

# Reporting on GBU Segmentation Fields in SFDC.

## Overview

## Table of content

In this section, you will find information about:

- How to create a report based on GBU segmentation
- How to delete a request

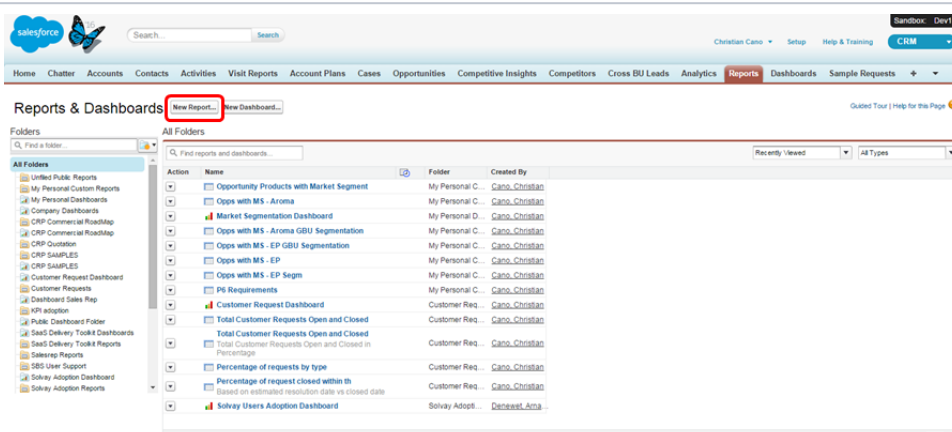
- [Step By Step](#)
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Concerned profiles:

Sales - Marketing

## Step By Step

• The user can make reports on the opportunities with products and users



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• The user chooses Opportunities with Products Report Type and clicks on the Create button.

## Create New Report

Select Report Types to Hide

Select Report Type

Quick Find

- Accounts & Contacts
- Opportunities
  - Opportunities and Cross BU Lead
  - Opportunities and End Use
  - Opportunities and Account Plan
  - Opportunities and GBU
  - Opportunities and BU
  - Opportunities and BU Region
  - Opportunities and Template Language
  - Opportunities with Products**
  - Opportunities with Products and Cross BU Lead
  - Opportunities with Products and End Use
  - Opportunities with Products and Account Plan
  - Opportunities with Products and GBU
  - Opportunities with Products and BU
  - Opportunities with Products and BU Region

Preview

**Opportunity - Product Report**

Price	Product Name			
Opportunity Stage	Generators	Widgets	Service Plans	Grand Total
Qualification	\$125,000	\$75,000	\$115,000	\$315,000
Need Analysis	\$350,000	\$67,000	\$89,000	\$506,000
Negotiations	\$230,000	\$43,000	\$65,000	\$338,000
<b>Grand Total:</b>	<b>\$705,000</b>	<b>\$185,000</b>	<b>\$269,000</b>	<b>\$1,159,000</b>

Cancel Create

• The user clicks on Show Details and then clicks on Remove All Columns to clean the Report.

Report Type: Opportunities with Products

Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields All

Quick Find

Drag and drop to add fields to the report

Bucket Fields

- Add Bucket Field
- Opportunity Information
  - Created By
  - Created Alias
  - Last Modified By
  - Opportunity Name
  - Type
  - Opportunity Record Type
  - Lead Source
  - Primary Name
  - Opportunity Currency
  - Amount
  - Amount (converted)
  - Closed
  - Won
  - Close Date
  - Close Date (2)
  - Close Month
  - Last Step Change Date
  - Next Step
  - Stage
  - Probability (%)
  - Fiscal Period
  - Fiscal Year
  - Age
  - Stage Duration
  - Forecast Category

Filters Add

Show All opportunities Opportunity Status: Open Probability: All

Date Field: Close Date Range: Current FQ From: 1/1/2016 To: 31/3/2016

To add filters, click Add

Preview Tabular Format Show Remove All Columns

Opportunity Name	Type	Amount	Close Date	Stage	Probability (%)	Created Date	Product Name	Quantity	Target Unit Price	Target Unit Price (converted)
TEST PRE	-	EUR 2,000.00	5/01/2016	1 - Quality	20 %	5/01/2016	RHODAMEEN T 201	1	EUR 0.00	EUR 0.00
TEST PRE	-	EUR 2,000.00	5/01/2016	1 - Quality	20 %	5/01/2016	RHODAMEEN T 201	1	EUR 2,000.00	EUR 2,000.00
TEST PRE 2	-	EUR 50.00	20/01/2016	1 - Quality	20 %	5/01/2016	TESTPRODUCT	1	EUR 50.00	EUR 50.00
InPer Product Sales 2	-	EUR 472,500.00	26/03/2016	2 - Sample Testing	30 %	19/01/2016	test for demo	1	EUR 472,500.00	EUR 472,500.00
InPer Product Sales 2	-	EUR 472,500.00	26/03/2016	2 - Sample Testing	30 %	19/01/2016	test for demo	1	EUR 0.00	EUR 0.00
test ashish	-	CDK 0.00	30/01/2016	1 - Quality	20 %	14/01/2016	TESTPRODUCT	1	CDK 0.00	EUR 0.00
et	-	-	5/01/2016	1 - Quality	20 %	5/01/2016	-	-	-	-
et	-	EUR 1,221.00	5/01/2016	1 - Quality	20 %	7/01/2016	(RR) METHYL OUPHOS	1	EUR 1,221.00	EUR 1,221.00
et	-	EUR 1,221.00	5/01/2016	1 - Quality	20 %	7/01/2016	TECHNYLA 118 V50 BLACK S1	1	EUR 0.00	EUR 0.00
et	-	-	5/01/2016	1 - Quality	20 %	20/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Quality	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
4594	-	-	13/01/2016	1 - Quality	20 %	13/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Quality	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
jjkothn	-	-	12/01/2016	1 - Quality	20 %	6/01/2016	-	-	-	-
jjkothn	-	-	12/01/2016	1 - Quality	20 %	14/01/2016	-	-	-	-
enherthy	-	EUR 25,536.00	8/01/2016	2 - Negotiate	50 %	8/01/2016	TESTPRODUCT	1	EUR 25,536.00	EUR 25,536.00

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### Market Segmentation - Delete a Request

•What if a Request needs to be deleted ?

Only the Administrator can delete a Request. If a Request is erroneous, that simply rejecting the Request is not sufficient and needs to be completely deleted from the system, a « Need Help » needs to be created to request this from the Support Team.

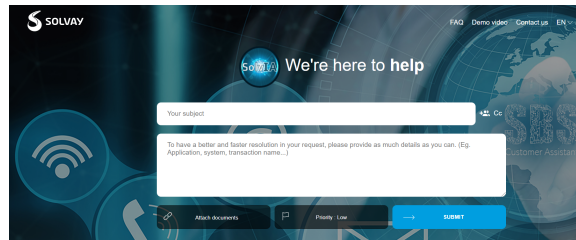
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## Related articles

- [Market Segmentation: Presentation](#)
- [Requesting a New End-Use](#)
- [Requesting a Change to a Corporate Segmentation](#)
- [Create a New Opportunity](#)
- [Reporting in SFDC – Create reports in SFDC](#)

## Need help?

To request any support or if you have identified a bug or incident , please create a Freshdesk ticket using Solvia platform : <https://solvia.solvia.com/>



*you can copy users with email address , default priority is Low , then Submit . We advise you to put keywords in subject to ease dispatching to correct Agent : CRM - Complaint for example*