

06. Sales Reporting & Analytics



Added Value

- Other advantages:

- ## What you need to know to start...

Qlik

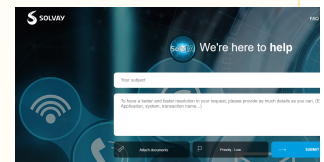
- Limited to no visibility

Profiles	SFDC	QuickView
 Sales	Sales Reps Dashboard Dashboard allows me to pilot activities in one glance : • Customer visits & object creation • Complaints for your accounts • Opportunities • Tasks → You can see only your own activities & figures	Order Book Sales Performance Overdue & DSO Opportunities
 Sales Managers / executives	Sales Manager dashboards Dashboards allowing managers to pilot activities in one glance for the team (N-1). Customer visits & visit reports, complaints, Opportunities, etc.	
 Customer Service, Quality, Prof.	Adoption dashboards (4 in total) Dashboard allowing to follow the adoption of the system in the GBU / Region in terms of logins, creation of objects, management of objects	
	PCR dashboard Dashboard showing the PCR objectives in terms of logins & object creation	
	Complaints	Complaints

- Introduction SFDC & Qlikview
- Reporting in SFDC - Definition
- Reporting in SFDC - Viewing existing dashboards in SFDC (depends on profile)
- Reporting in SFDC – Create reports in SFDC
- Reporting in SFDC – Select the right Report Type
- Qlikview - Analytics
- Reporting in SFDC - Viewing existing reports in SFDC (depends on profile)

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.solvay.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