

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
- Related articles
- Need help?

Concerned profiles:

Sales - Marketing

Step By Step

The screenshot shows the Salesforce Reports & Dashboards interface. The 'New Report...' button is highlighted with a red box. The page displays a list of folders and reports on the left, and a table of reports on the right.

Left Panel: Folders and Reports

- Folders:**
 - United Public Reports
 - My Personal Custom Reports
 - My Personal Dashboards
 - Company Dashboards
 - CRP Commercial Roadmap
 - CRP Commercial Roadmap
 - CRP Quotation
 - CRP SAMPLES
 - CRP SAMPLES
 - Customer Request Dashboard
 - Customer Requests
 - Dashboard Sales Rep
 - VPN adoption
 - Public Dashboard Folder
 - SaaS Delivery Toolkit Dashboards
 - SaaS Delivery Toolkit Reports
 - Sales Rep Reports
 - SaaS User Support
 - SaaS Adoption Dashboard
 - SaaS Adoption Reports
- Reports:**
 - Opportunity Products with Market Segment
 - Ops with MS - Aurora
 - Market Segmentation Dashboard
 - Ops with MS - Aurora GBU Segmentation
 - Ops with MS - EP GBU Segmentation
 - Ops with MS - EP
 - Ops with MS - EP Segm
 - PI Requirements
 - Customer Request Dashboard
 - Total Customer Requests Open and Closed
 - Total Customer Requests Open and Closed in Percentage
 - Percentage of requests by type
 - Percentage of request closed within th
 - Solve Users Adoption Dashboard

Right Panel: Report Table

Action	Name	Folder	Created By
+	Opportunity Products with Market Segment	My Personal C	Ciao, Christian
+	Ops with MS - Aurora	My Personal C	Ciao, Christian
+	Market Segmentation Dashboard	My Personal D	Ciao, Christian
+	Ops with MS - Aurora GBU Segmentation	My Personal C	Ciao, Christian
+	Ops with MS - EP GBU Segmentation	My Personal C	Ciao, Christian
+	Ops with MS - EP	My Personal C	Ciao, Christian
+	Ops with MS - EP Segm	My Personal C	Ciao, Christian
+	PI Requirements	My Personal C	Ciao, Christian
+	Customer Request Dashboard	Customer Req	Ciao, Christian
+	Total Customer Requests Open and Closed	Customer Req	Ciao, Christian
+	Total Customer Requests Open and Closed in Percentage	Customer Req	Ciao, Christian
+	Percentage of requests by type	Customer Req	Ciao, Christian
+	Percentage of request closed within th	Customer Req	Ciao, Christian
+	Solve Users Adoption Dashboard	Solve Adopt	Deneest, Ama

on the GBU Segment at ion fields. In order to do so, the user clicks on the **R e p o r t s** tab and then clicks on the **N e w R e p o r t** button.

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

Create New Report

Select Report Types to Hide

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	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
Grand Total:		\$705,000	\$185,000	\$269,000	\$1,159,000

Cancel Create

• The user clicks on Show Details and then clicks on Remove All Columns

Report Type: Opportunities with Products

Unsaved Report

Guided Tour | View Tutorial | Help for this Page

Save Save As Close

Report Properties Add Report Type **Unsaved Report**

Fields

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
- Last Modified Alias
- Opportunity Name
- Type
- Opportunity Record Type
- Lead Source
- Primary Partner
- Opportunity Currency
- Amount
- Amount (converted)
- Closed
- Won
- Closed Date
- Closed Date (2)
- Last Stage 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

Filter Language: English

Date Field: Close Date

Range: Current FQ

From: 10/1/2016

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 - Qualify	20 %	5/01/2016	RHODAMEEN T 201	1	EUR 0.00	EUR 0.00
TEST PRE	-	EUR 2,000.00	5/01/2016	1 - Qualify	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 - Qualify	20 %	5/01/2016	TESTPRODUCT	1	EUR 50.00	EUR 50.00
In-Per 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
In-Per 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	5/01/2016	1 - Qualify	20 %	14/01/2016	TESTPRODUCT	1	CDK 0.00	EUR 0.00
ef	-	-	5/01/2016	1 - Qualify	20 %	5/01/2016	-	-	-	-
ef	-	EUR 1,221.00	5/01/2016	1 - Qualify	20 %	7/01/2016	(RR) METHYL DIPHOS	1	EUR 1,221.00	EUR 1,221.00
ef	-	EUR 1,221.00	5/01/2016	1 - Qualify	20 %	7/01/2016	TECHNYL A 118 V50 BLACK S1	1	EUR 0.00	EUR 0.00
ef	-	-	5/01/2016	1 - Qualify	20 %	20/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Qualify	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
4594	-	-	13/01/2016	1 - Qualify	20 %	13/01/2016	-	-	-	-
4594	-	EUR 14,140.00	13/01/2016	1 - Qualify	20 %	13/01/2016	TESTPRODUCT	1	EUR 14,140.00	EUR 14,140.00
jijcdthn	-	-	12/01/2016	1 - Qualify	20 %	6/01/2016	-	-	-	-
jijcdthn	-	-	12/01/2016	1 - Qualify	20 %	14/01/2016	-	-	-	-
enjherty	-	EUR 25,536.00	8/01/2016	2 - Negotiate	50 %	8/01/2016	TESTPRODUCT	1	EUR 25,536.00	EUR 25,536.00

• For

om the left pane, the user can then add relevant columns such as Opportunity Name, Product Name, Market, Segment, Application

Report Type: Opportunities with Products
Unsaved Report

Save Save As Close Report Properties Add Report Type Run Report

Fields: All Fields Add
Show: All opportunities Opportunity Status: Open Probability: All
Date Field: Close Date Range: All Time From To
Filter Language: English

Opportunity Name contains "chris, aroma, ep"

Preview Tabular Format Show Remove All Columns

Opportunity Name	Product Name	Market	Segment	Application	End Use	GBU Segmentation 1	GBU Segmentation 2
Chris Opportunity	Dummy Product EP	TESTPRODUCT	LIGHTWEIGHTING	EXTERNAL PARTS	WRITE WATER TREATMENT VULCUS	PRODUCTION	ML & GDS EDUCATION'S VULC
Chris Opportunity	Dummy Product EP	-	-	-	-	-	-
Chris Opportunity	Dummy Product EP	AUTOMOTIVE	LIGHTWEIGHTING	EXTERNAL PARTS	EXTERNAL DOOR HANDLES	EXTERNAL PARTS	LIGHTWEIGHTING
Chris Opportunity	Dummy Product EP	-	-	-	-	-	-
Opportunity Aroma	TESTPRODUCT	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	BEVERAGES/ HOT TEA	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity Aroma 3	TESTPRODUCT	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	SWEET GOODS/ BAKERY/ BISCUITS	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity Aroma 3	TESTPRODUCT	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	HEALTH CARE	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity Aroma 4	TESTPRODUCT	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	DAIRY/ OTHERS	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity Aroma 4	TESTPRODUCT	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	BEVERAGES/ CONCENTRATES	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity Aroma 4	test for demo	FOOD	FLAVOR & FLAVOR FORMULATION	FLAVOR	BEVERAGES/ WATER	FLAVOR	FLAVOR & FLAVOR FORMULATION
Opportunity EP	TESTPRODUCT	AUTOMOTIVE	LIGHTWEIGHTING	EXTERNAL PARTS	SUN ROOF FRAME	EXTERNAL PARTS	LIGHTWEIGHTING
Opportunity EP 2	TESTPRODUCT	CONSUMER GOODS	SPORTS & LEISURE	BATTERY (NON AUTO)	BICYCLE	BATTERY (NON AUTO)	SPORTS & LEISURE
Opportunity EP 3	TESTPRODUCT	INDUSTRIAL APPLICATIONS	INDUSTRIAL EQUIPMENT	INDUSTRIAL EQUIPMENT PARTS	ATTACHMENTS TAILOR	INDUSTRIAL EQUIPMENT PARTS	INDUSTRIAL EQUIPMENT

Grand Totals (3 records)

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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.

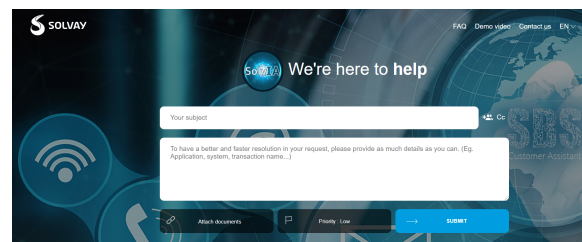
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Related articles

- [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.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