

Reporting in SFDC - Viewing existing dashboards in SFDC (depends on profile)

Overview

In this section, you will find information about how to view, create and refresh a dashboard. You will also see where to find the dashboard for the sales representatives and the sales managers.

Concerned profiles:

ALL

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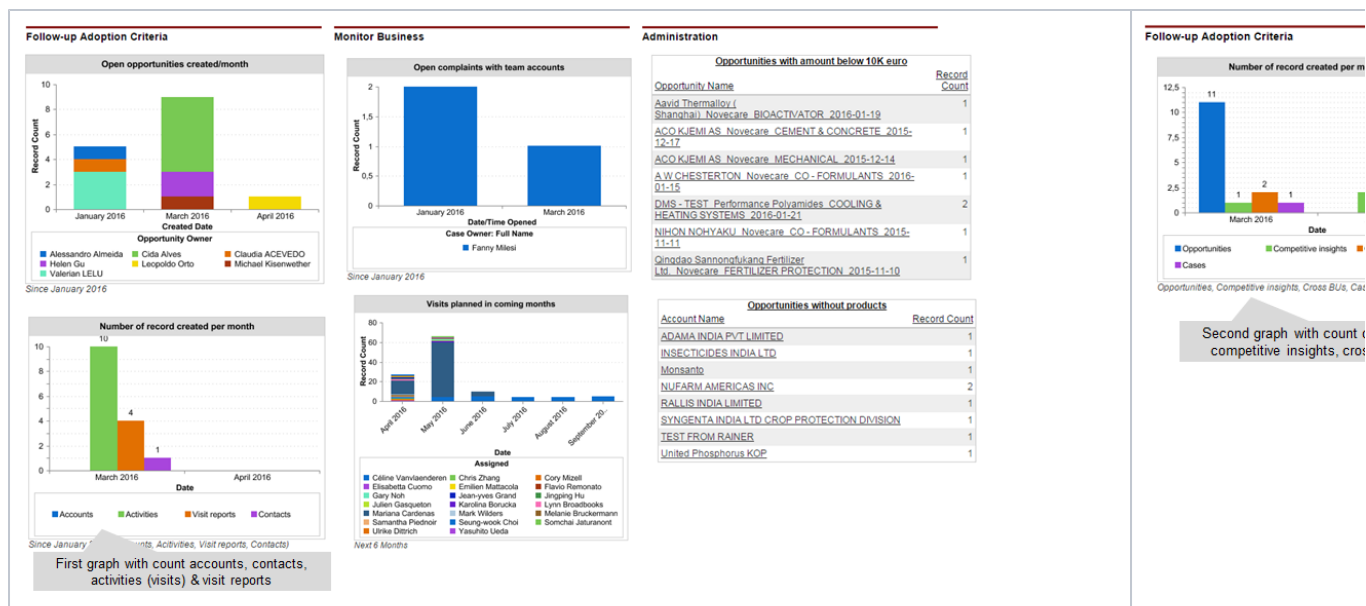
Step By Step

How to find Dashboards

The screenshot shows the Salesforce interface with the 'Dashboards' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Quality dashboards' with a 'Show Feed' button. A search bar is present, and a dropdown menu is open, displaying a list of dashboards. A red box highlights the search bar and the dropdown menu. A callout bubble points to the search bar with the text 'Use the search bar to find your dashboard'. The dropdown menu is divided into sections: 'Recently Viewed', 'Aroma Dashboards', 'Coatlis Dashboards', and 'Commercial Roadmap'. The 'Aroma Dashboards' section is highlighted, showing 'Aroma Performance Adoption Dashboard', 'KA - Aroma Ingredients Business', and 'KA - Aroma Performance Solutions Business'. The 'Coatlis Dashboards' section shows 'Coatlis Adoption dashboard'. The 'Commercial Roadmap' section is partially visible at the bottom. To the right of the search bar, there is a bar chart titled 'Customer Visits without Visit Report' showing record counts for various categories.

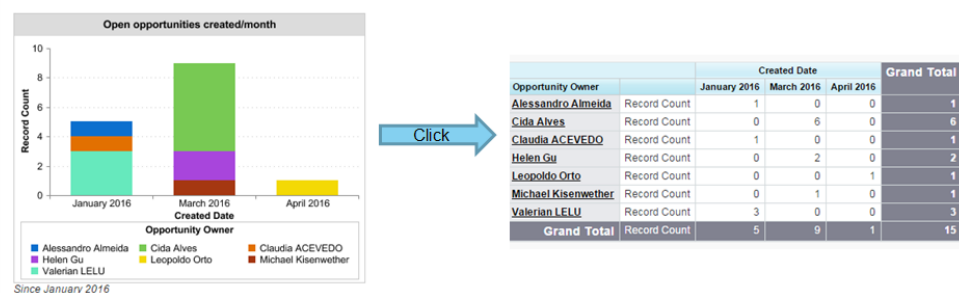
Category	Record Count
Novarecare	821
Special Chem	166
Performance ..	105
Peroxides	90
Soda Ash & D...	88
Aroma Perfor..	43
Fibras	41
Silica	33
Coatlis	23
...	9

Dashboard Folders



You can get a detailed view by clicking on the chart.

Example:



By clicking on 'View Details' on top of the page, you can see the list of records (e.g. opportunities) with the link to the record page.

BDM Dashboard

The DBM Dashboard has been developed specifically for **Business Development Managers** to manage and monitor **opportunities linked to their** area, region, stage, type, expected revenue.

Column 1:

- Opportunities by region

Column 2:

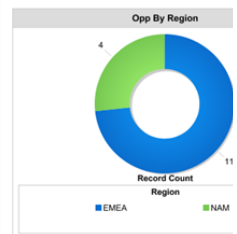
- Opportunities by stage
- Opportunities by type

Column 3:

- Opportunities by expected revenue



Here I can see
only **data I have
access to**.



This dashboard will be located in '*BDM dashboard*' folder, and be named "**BDM dashboard**". This is a dynamic dashboard, used by all GBUs.

KAM Dashboard

The KAM Dashboard has been developed to manage and monitor activities and records in Salesforce linked to Key Accounts of the GBU. In this dashbo

Column 1:

- # of visit reports in the last 6 months
- Last 10 visit reports
- # of ADP created
- # of competitive insights

Column 2:

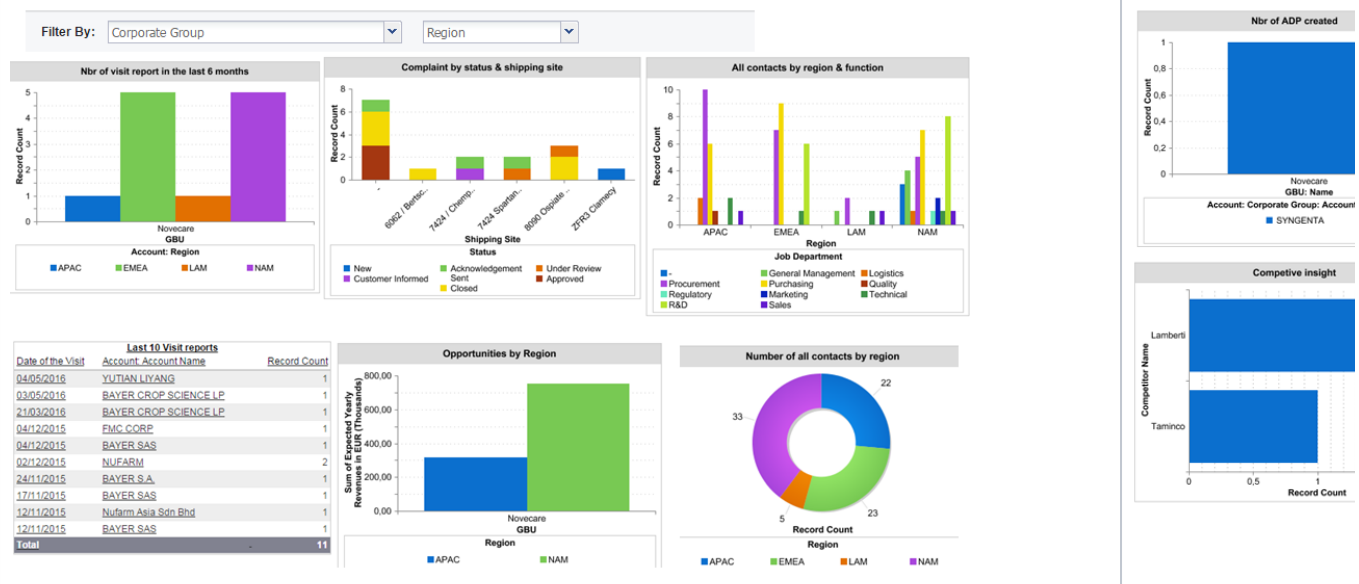
- # of complaint by status & shipping site
- Opportunities by region
- Last 10 opportunities

Column 3:

- All contacts by region & function
- # of contact by region
- # of contact per job department
- Opportunity by end use



Here I can see
only **data I have
access to**.



Adoption Dashboards

The objective of adoption dashboards is to monitor the usage of [Salesforce.com](https://www.salesforce.com) in terms of logins, objects created and quality of objects created and updated. These reports allow to take action when there is any issue in adoption and to monitor whether licenses are justified.

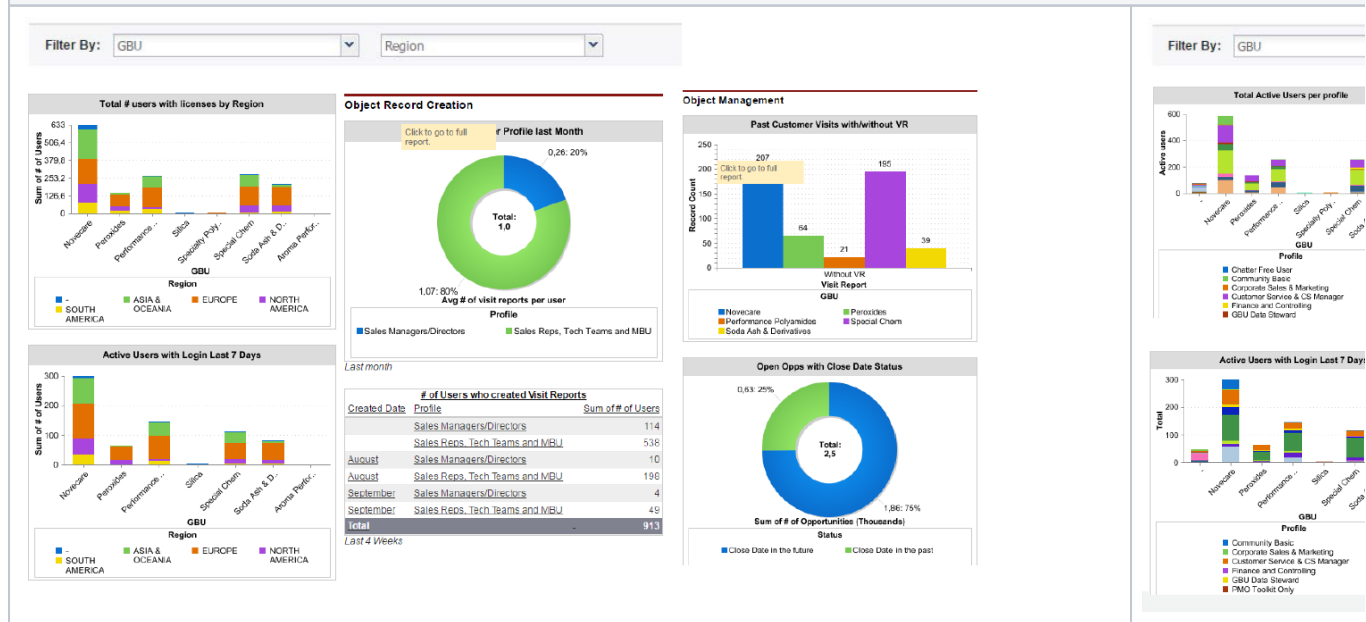
There are 3 types of adoption dashboards:

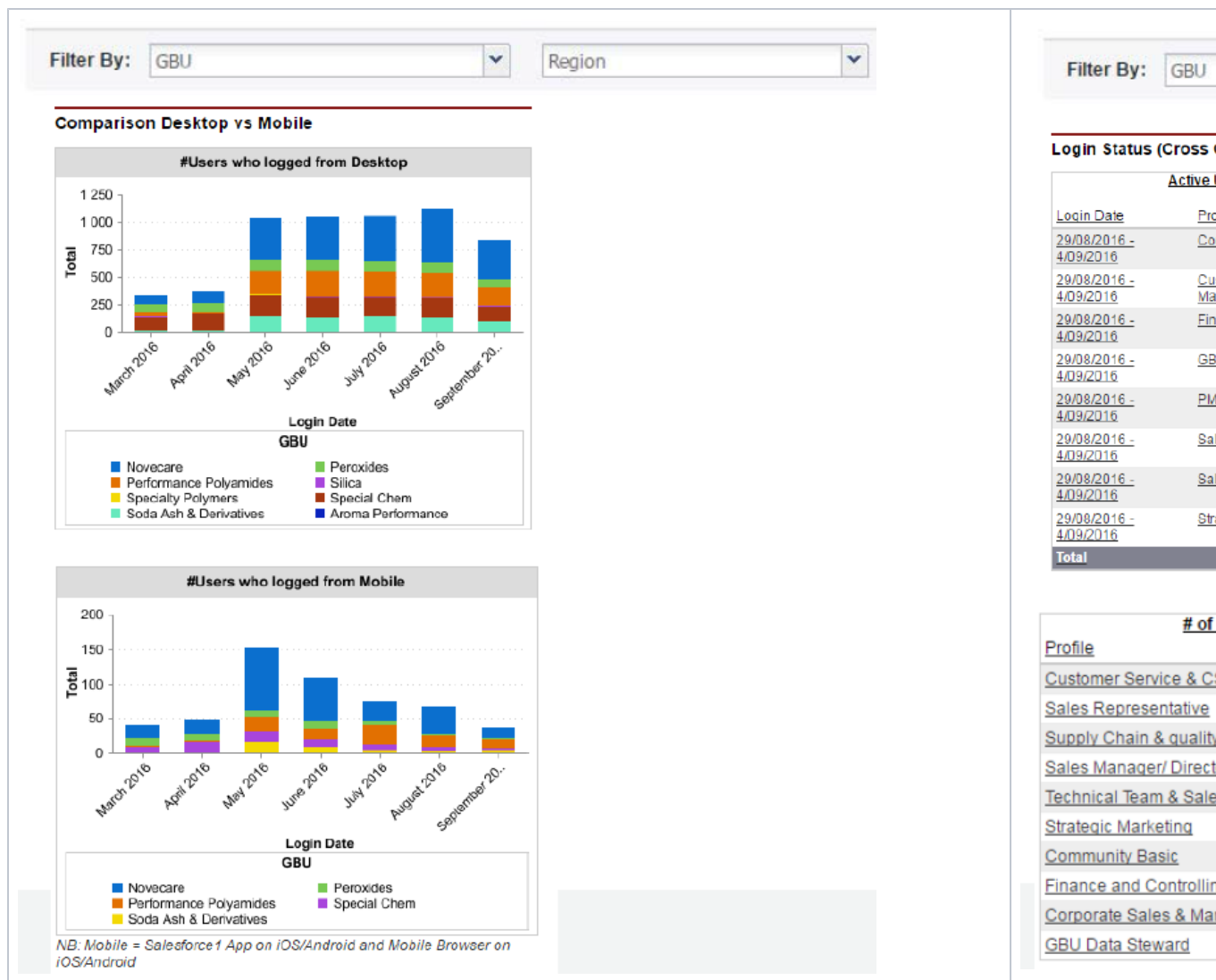
•**Solvay Adoption & Executives Dashboard:** can be used by managers & CRM Champions (will be soon merged with the Solvay Executive Dashboard) to monitor the adoption figures by GBU and/or Region

•**Solvay User Adoption Dashboard:** Can be used by the management and CRM Champions to follow up adoption figures user by user. Attention: Access to all users may be restricted for legal reason (e.g. not allowed to display data to all for German Work Council)

•**Corporate CRM Program Dashboard:** Shows overall adoption figures for GBUs with monthly evolution. Is used mainly by the CRM Project Team but can be used by CRM Champions and GBU management.

Solvay adoption & executive dashboard





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Related articles

- [Introduction SFDC & Qlikview](#)
- [Reporting in SFDC - Definition](#)
- [Qlikview - Analytics](#)
- [Reporting in SFDC – Create reports in SFDC](#)
- [Opportunity with end use \(report\)](#)
- [Reporting on GBU Segmentation Fields 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