

A2111 - Convergence Reports and Dashboards

Overview

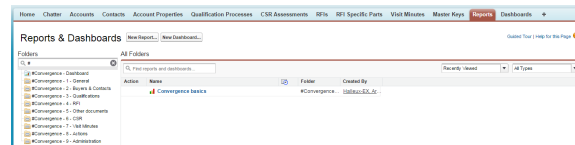
Reports bring the opportunity to analyse several objects in one time, with filtering options. Dashboards aggregate graphics data such as charts, on one readable page.

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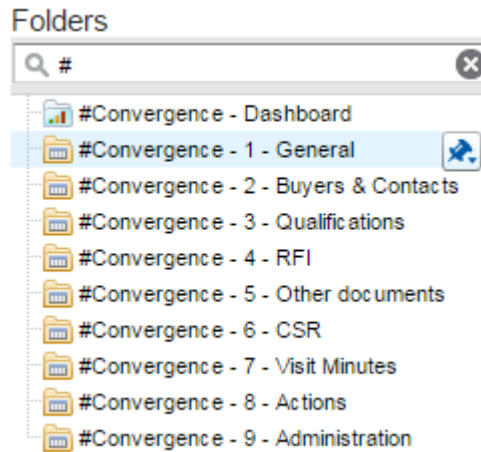
Where are Reports and dashboard?

Reports are accessible by the tab "Reports". Dashboard can be both found in the folder "**#Convergence**" - Dashboard" or via the tab "Dashboards"



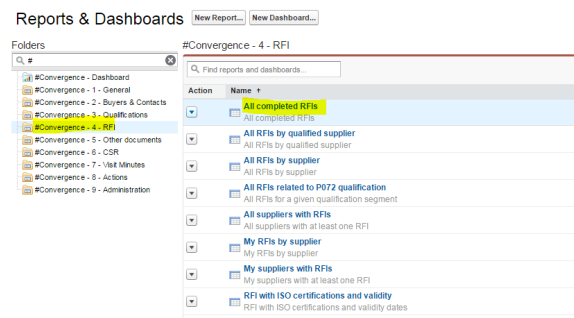
Reports and Dashboards are categorized in folders :

- #Convergence - Dashboard
- #Convergence - 1 - General
- #Convergence - 2 - Buyers & Contacts
- #Convergence - 3 - Qualifications
- #Convergence - 4 - RFI
- #Convergence - 5 - Other documents
- #Convergence - 6 - CSR
- #Convergence - 7 - Visit Minutes
- #Convergence - 8 - Actions

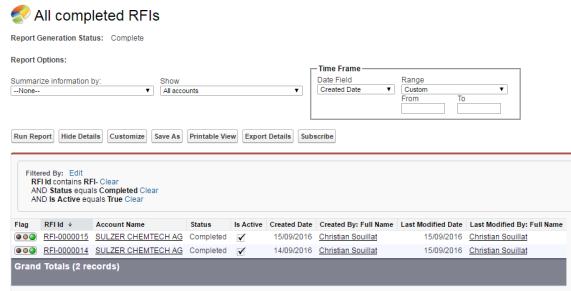


General navigation

To **open** a Report or a Dashboard, first open the folder and then click on the Report.



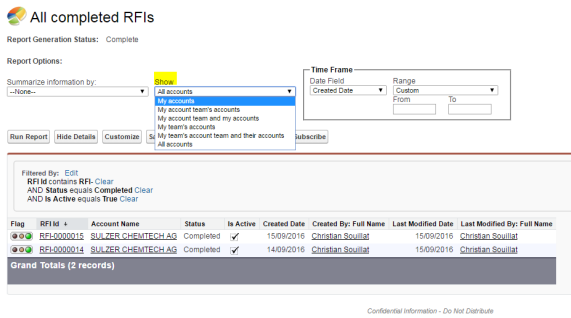
Your Report is now displayed.



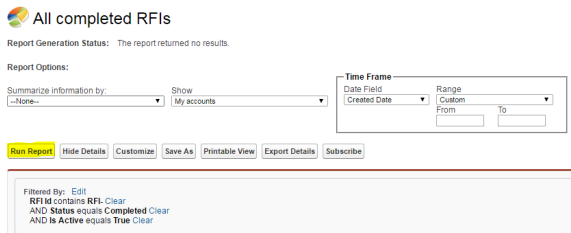
Feel free to use the **filters**.

The filter "Show" is useful to display only your objects for example.

The Time Frame is another example of Reports filters.



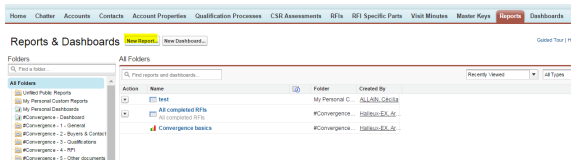
Every time you use filters, press "**Run Report**" to apply changes.



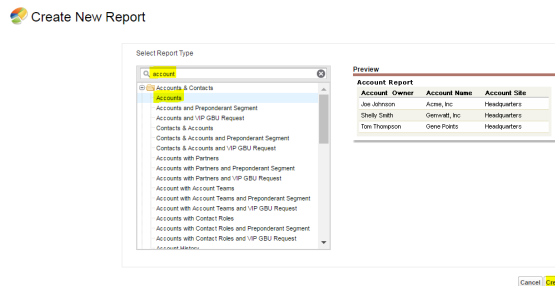
New Reports

Fell free to create a new Report. Otherwise, ask your Service Support with a Freshdesk ticket for further information.

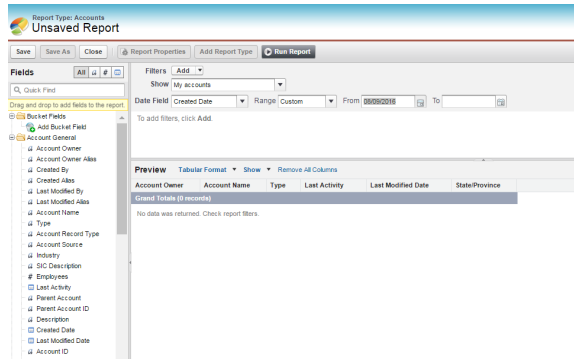
Click on the Customize button of any Report



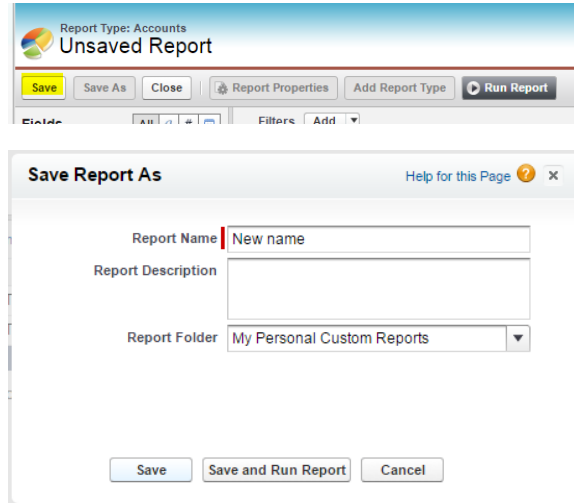
Choose the **object** you want to create your Report with. In this case, Accounts. Click on "Create".



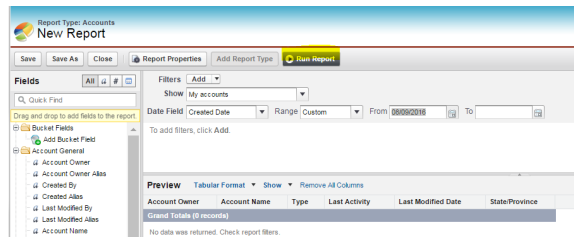
Here is your new Report page.



Choose a new name for you new Report.



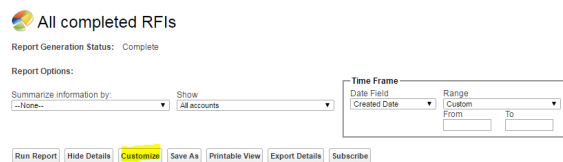
Save your Report. And then Run Report.



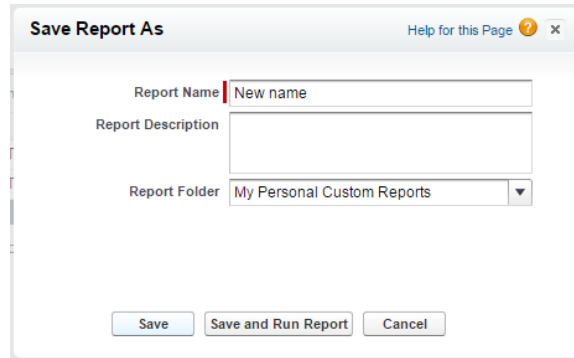
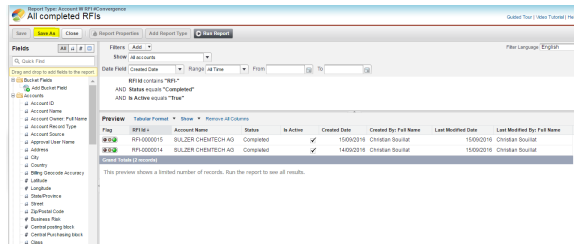
Customize Reports

Fell free to customize any Report.

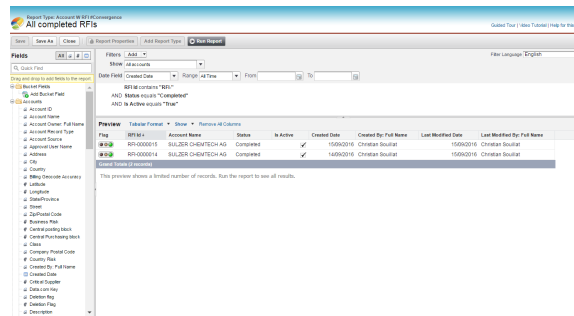
Click on the Customize button of any Report



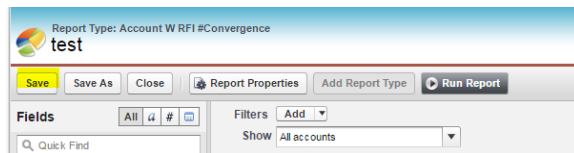
Choose a new name for you cloned report.



Customize fields and criteria. Contact the Service support for more information.



Save your Report. And then **Run Report**.



Related articles

- [A21 - Reporting](#)

Need help

How to ask for assistance?

Dear *SalesForce Convergence* user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
 - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
 - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
 - Process : Data & Analysis
 - PTP-Subprocess: Purchasing Tools Support
 - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

Convergence Team.