

A2111 - Convergence Reports and Dashboards

Overview

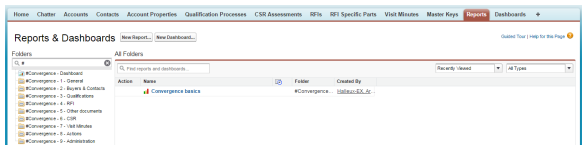
Reports bring the opportunity to analyse several objects in one time, with filtering options. Dashboards aggregate graphics data such as charts, on one readable page.

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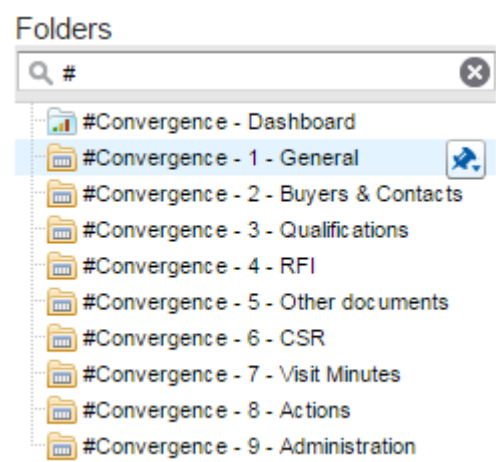
Where are Reports and dashboard?

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



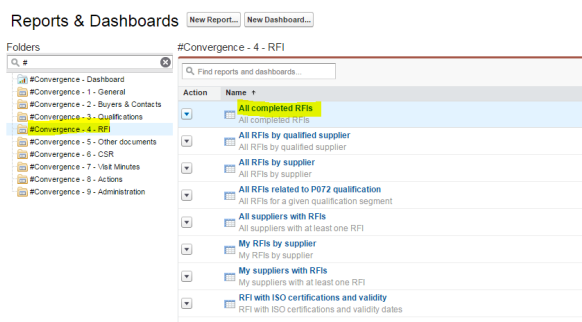
Reports and Dashboards are categorized in folders :

- #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.

All completed RFIs

Report Generation Status: Complete

Report Options:

Summarize information by: None Show All accounts

Time Frame: Date Field Created Date Range Custom From To

[Run Report](#) [Hide Details](#) [Customize](#) [Save As](#) [Printable View](#) [Export Details](#) [Subscribe](#)

Filtered By: [Edit](#)
 RFIId contains RFI: [Clear](#)
 AND Status equals Completed: [Clear](#)
 AND Is Active equals True: [Clear](#)

Flag	RFIId	Account Name	Status	Is Active	Created Date	Created By: Full Name	Last Modified Date	Last Modified By: Full Name
RFI	RFI-0000015	SULZER CHEMTECH AG	Completed	✓	15/09/2016	Christian Soulliat	15/09/2016	Christian Soulliat
RFI	RFI-0000014	SULZER CHEMTECH AG	Completed	✓	14/09/2016	Christian Soulliat	15/09/2016	Christian Soulliat

Grand Totals (2 records)

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.

All completed RFIs

Report Generation Status: Complete

Report Options:

Summarize information by: None Show All accounts

Time Frame: Date Field Created Date Range Custom From To

[Run Report](#) [Hide Details](#) [Customize](#) [Save As](#) [Printable View](#) [Export Details](#) [Subscribe](#)

Filtered By: [Edit](#)
 RFIId contains RFI: [Clear](#)
 AND Status equals Completed: [Clear](#)
 AND Is Active equals True: [Clear](#)

Flag	RFIId	Account Name	Status	Is Active	Created Date	Created By: Full Name	Last Modified Date	Last Modified By: Full Name
RFI	RFI-0000015	SULZER CHEMTECH AG	Completed	✓	15/09/2016	Christian Soulliat	15/09/2016	Christian Soulliat
RFI	RFI-0000014	SULZER CHEMTECH AG	Completed	✓	14/09/2016	Christian Soulliat	15/09/2016	Christian Soulliat

Grand Totals (2 records)

Confidential Information - Do Not Distribute

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

All completed RFIs

Report Generation Status: The report returned no results.

Report Options:

Summarize information by: None Show My accounts

Time Frame: Date Field Created Date Range Custom From To

[Run Report](#) [Hide Details](#) [Customize](#) [Save As](#) [Printable View](#) [Export Details](#) [Subscribe](#)

Filtered By: [Edit](#)
 RFIId contains RFI: [Clear](#)
 AND Status equals Completed: [Clear](#)
 AND Is Active equals True: [Clear](#)

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

Home [Chatter](#) [Accounts](#) [Contacts](#) [Account Properties](#) [Qualification Processes](#) [CSR Assessments](#) [RFIs](#) [RFI Specific Parts](#) [Visit Minutes](#) [Master Keys](#) [Reports](#) [Dashboards](#)

Reports & Dashboards [New Report...](#) [New Dashboard...](#)

Folders: [All Folders](#)

Actions: [All completed RFIs](#) [Convergence leads](#)

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

Create New Report

Select Report Type

[Accounts & Contacts](#)

[Accounts and Prependant Segment](#)

[Accounts and VIP GBU Request](#)

[Contacts & Accounts](#)

[Contacts & Accounts and Prependant Segment](#)

[Contacts & Accounts and VIP GBU Request](#)

[Accounts with Partners](#)

[Accounts with Partners and Prependant Segment](#)

[Accounts with Partners and VIP GBU Request](#)

[Account with Account Teams](#)

[Account with Account Teams and Prependant Segment](#)

[Account with Account Teams and VIP GBU Request](#)

[Accounts with Contact Roles](#)

[Accounts with Contact Roles and Prependant Segment](#)

[Accounts with Contact Roles and VIP GBU Request](#)

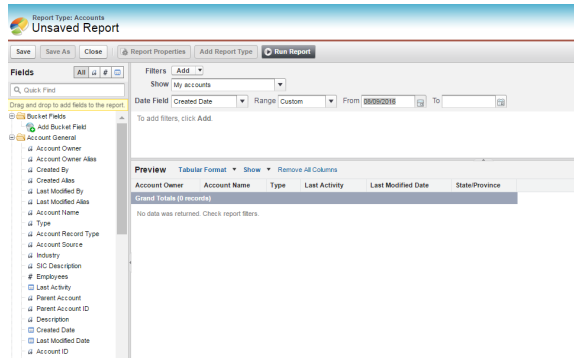
[Account Allocation](#)

Preview

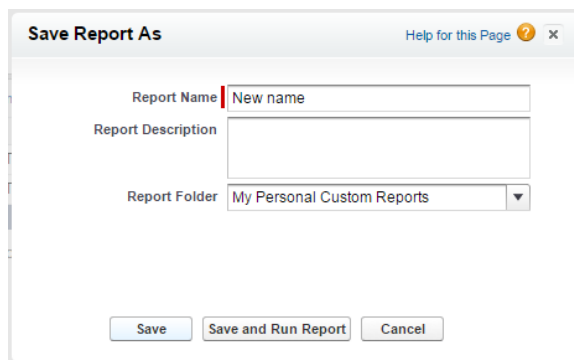
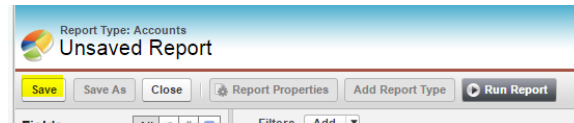
Account Owner	Account Name	Account Site
Joe Johnson	Acme, Inc	Headquarters
Shelly Smith	General, Inc	Headquarters
Tom Thompson	Gene Parts	Headquarters

[Cancel](#) [Create](#)

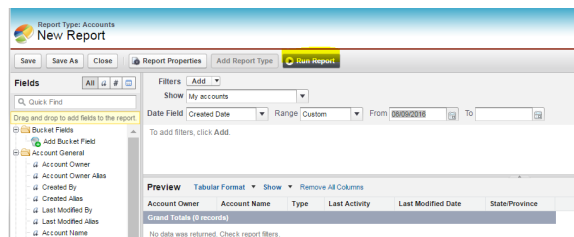
Here is your new Report page.



Choose a new name for you new Report.



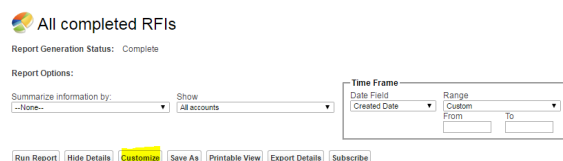
Save your Report.And then Run Report.



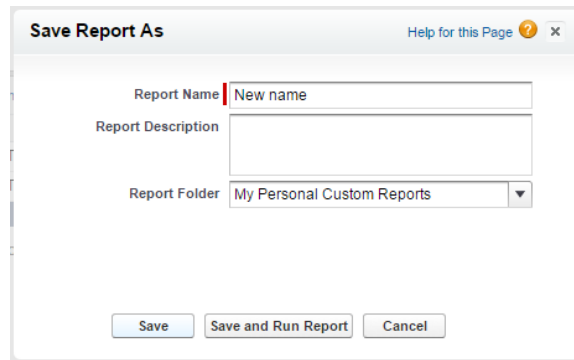
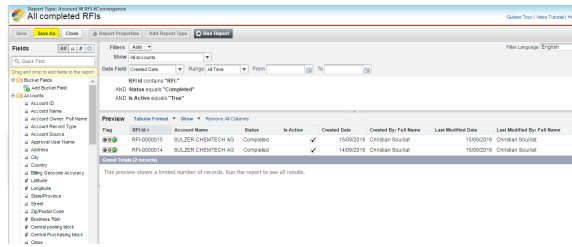
Customize Reports

Fell free to customize any Report.

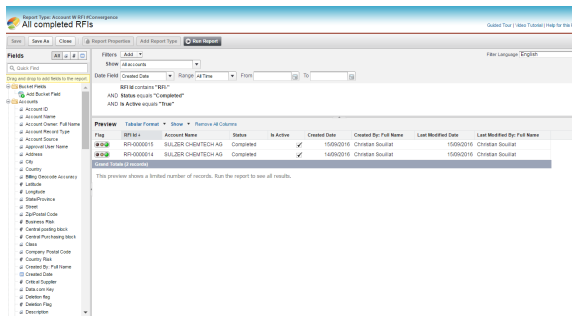
Click on the Customize button of any Report



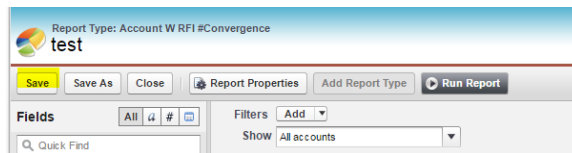
Choose a new name for you cloned report.



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.