# 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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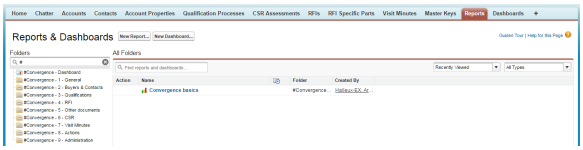
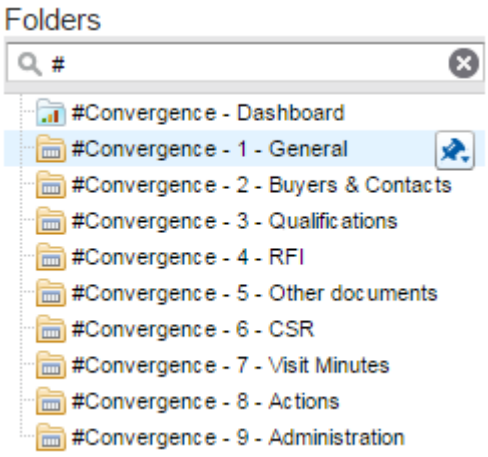
## Where are Reports and dashboard?

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



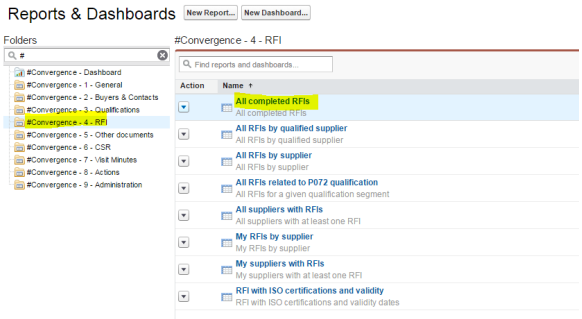

Reports and Dashboards are categorized in folders :

#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

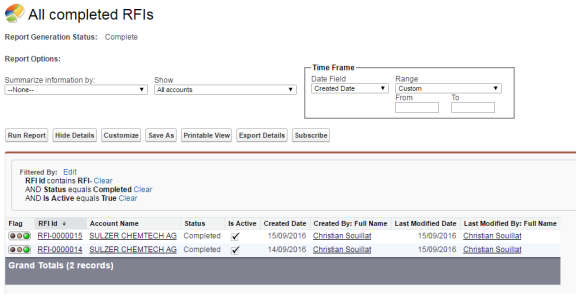



## General navigation

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



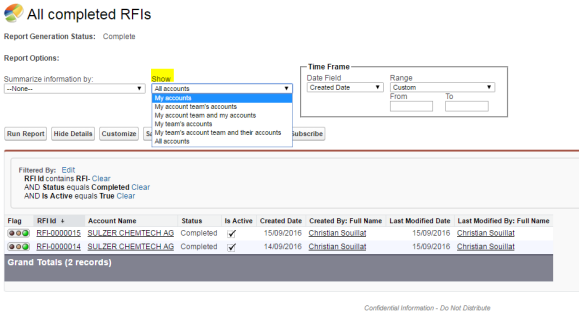

Your Report is now displayed.



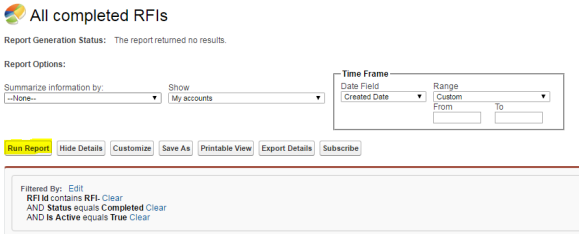

Feel free to use the **filters**.

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

The Time Frame is another example of Reports filters.



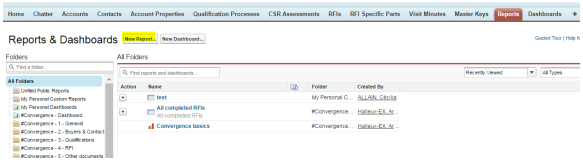

Every time you use filters, press "**Run Report**" to apply changes.



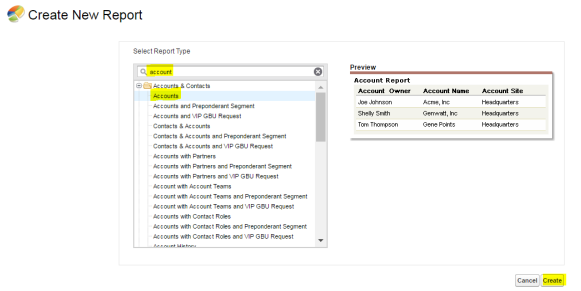

# New Reports

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

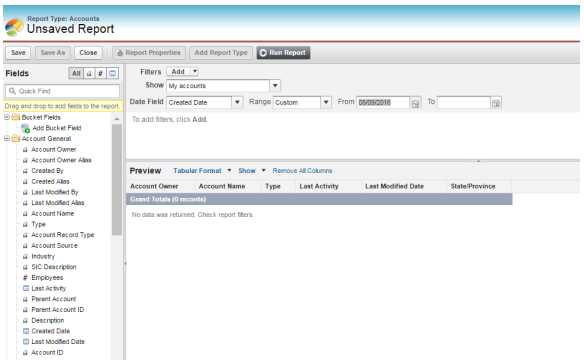
**Click** on the Customize button of any Report



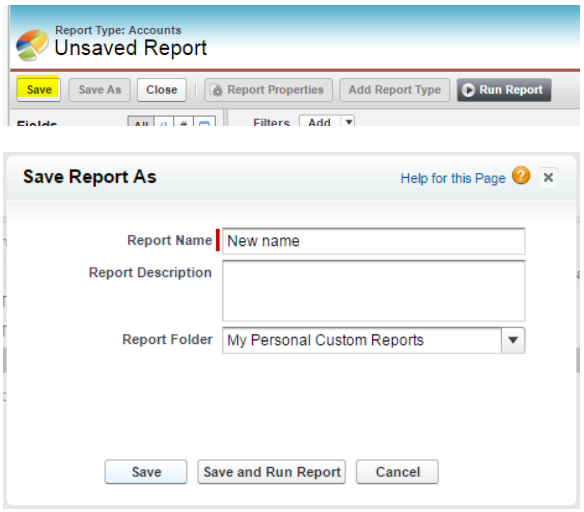

Choose the **object** you want to create your Report with. In this case, Accounts. Click on "Create".



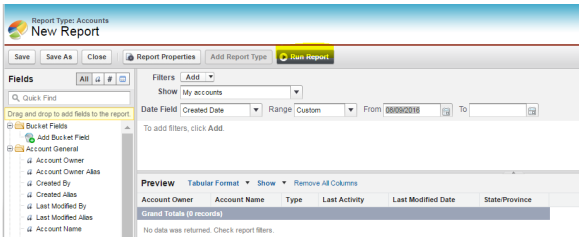

Here is your new Report page.




**Choose a new name** for you new Report.



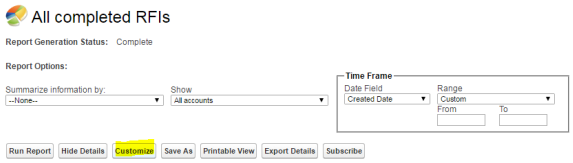

**Save** your Report.And then **Run Report**.



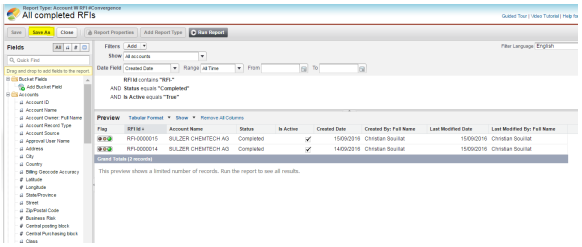

## Customize Reports

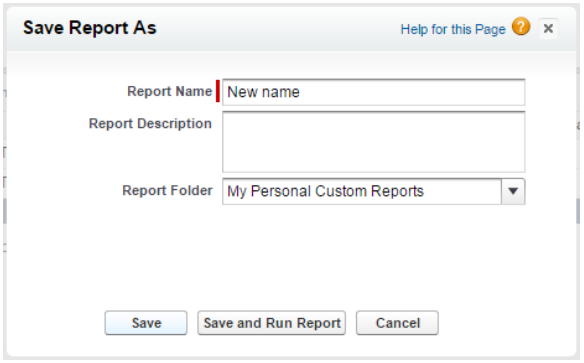
Fell free to customize any Report.

**Click** on the Customize button of any Report

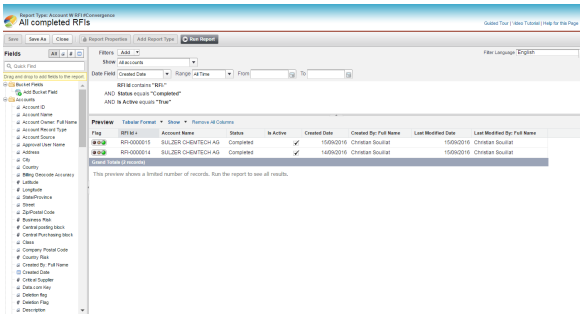



**Choose a new name** for you cloned report.

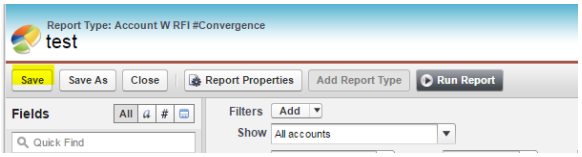





**Customize** fields and criteria. Contact the Service support for more information.



**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.*