FD - Lightning home page

Version Control

Version	Date	Description	Author
v.1	18.06.2018	Creation	Sophie Millet
v.2	26.02.19	Update winter19	Julien Andréoli

Home Page Components & Layout

Components

The view is split into 2 tabs "Business" and "Service". The tab is automatically selected based on the organizational role of the user connected:

- For 'Sales' it will be Busniess tab
- For 'Customer service representative' it will be Service tab
- For any other role it will be Business

Tab	Name	Description	Standard / Custom
Business	My Ongoing Visit Reports	List view of opened visit reports	Custom
	My Ongoing Event	List of event not associated to visit report	Custom
	My Expiring Opportunities	List view of opened opportunities that are expiring	Custom
	My Opportunities Without Product or Forecast	List view of opened opportunities to be completed	Custom
	My Renewal Quotes	List of quotes about to expire and requiring renewal	Custom
	My Pending Quotes	List of quotes about to sent to customer	Custom
	My Pending Conversion Requests	List view of drafted conversion requests	Custom
	Tasks	Component to access tasks by date or status	Standard
Service	My Open Complaints	List view of opened complaints	Custom
	My Open Sample Requests	List view of opened complaints	Custom
	My Open Leads	List view of opened leads	Custom
	My Open Customer Requests	List view of opened customer requests	Custom
	My Open Customer Specific Requirements	List view of opened customer specific requirements	Custom
	Highlights	Cross-accounts view for the accounts which the user is related to (part of the account team)	Custom

	Items to Approve	Component to list records requiring approval	Standard
	Events	Component to access events of the day	Standard

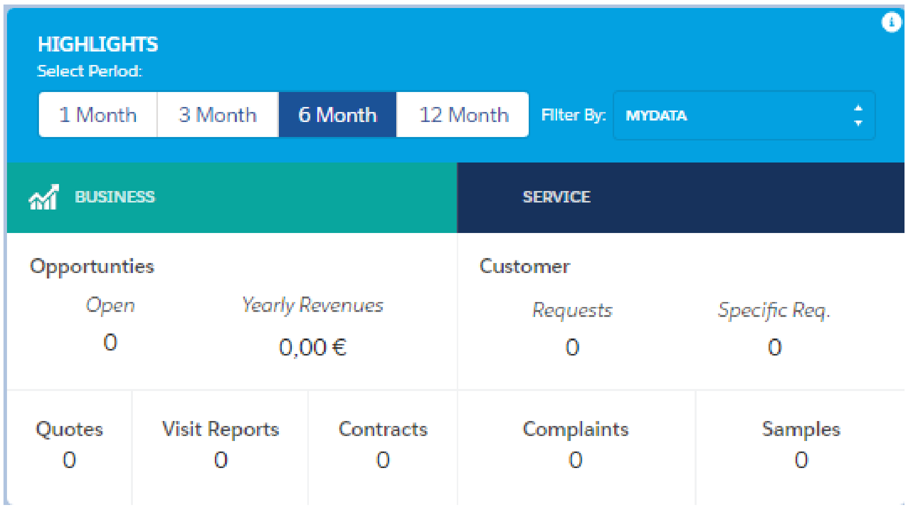
Custom Features

Highlights

The Home page highlight component appears in his home page and provides cross-accounts view for the accounts which the user is related to.

Counts are based on account team membership. An active user will only see counted records related to accounts where he's a team member.

This component is not displayed for admin and GBU data steward because of performance issues.



If an object is not used by a GBU, the count on objects never apply and the value "N/A" is displayed against the object instead of a number. The definition of those custom settings are listed here.

	Aroma Performance	Coatis	Fibras	Novecare	Performance Polyamides	Peroxides	Silica	Soda Ash & Derivatives	Special Chem	Corporate	Solvay Energy Services
Opportunities											
Quotes											N/A
Contracts											
Visit Reports											
Customer Requests						N/A		N/A	N/A		
CSR		N/A	N/A		N/A	N/A	N/A	N/A	N/A	N/A	N/A
Complaints											
Samples											N/A

If the count of an object is 0, the 0 is not clickable.

If the count of an object is > 0, the figure is clickable is will open a modal view listing the details of the objects :


Open Opportunities (1)

NAME	ACCOUNT	RECORD TYPE	EXPECTED YEARLY REVENU	CLOSE DATE	STAGE	OWNER	GBU	BU
fgjhfj	COSMOCIENCIA ESPECI...	Growth-Product Requirin...	60 300,00 €	06-mai-2018	1 - Qualify	Novecare Lightning	Novecare	Coatings

Every figure is clickable and redirect the user to the correct list view (only items that are counted on the highlight component)

- Opportunity list view fields :
    - Opportunity Name
    - Account
    - Opportunity Record Type
    - Expected Yearly Revenue (with currency)
    - Close Date
    - Stage
    - Owner Full Name
    - GBU
    - BU
- Quotes list view fields :
    - Quote Name
    - Status
    - Account
    - Opportunity
    - Quote Validity Date
    - Owner Full Name
    - Created Date
    - GBU
    - BU
- Visit reports list view fields :
    - Subject
    - Account
    - Contact
    - Date of the Visit
    - Owner Full Name
    - GBU
    - BU
- Contracts list view fields :
    - Contract Name
    - Record Type
    - Contract Start Date
    - Contract End Date
    - Status
    - Owner Full Name
    - GBU
    - BU
- Conversion requests (for Service only) list view fields :
    - Request Number
    - Record Type
    - Record Status
    - Account
    - Type of Account
    - Account status
    - Owner Full Name
    - GBU
    - BU
- Customer Requests list view fields :
    - Case Number
    - Account Name
    - Contact Name
    - Subject
    - Status
    - Priority
    - Date/Time Opened
    - Owner Full Name
    - GBU
    - BU
- Customer Specific Requirements list view fields :
    - Case Number
    - Account Name
    - Contact Name
    - Subject
    - Status
    - Priority
    - Date/Time Opened
    - Owner Full Name
    - GBU
    - BU
- Complaints list view fields :
    - Case Number
    - Account Name
    - Contact Name
    - Subject
    - Status
    - Priority
    - Date/Time Opened
    - Owner Full Name
    - GBU

- BU
- Sample Requests list view fields :
    - Case Number
    - Sold to Account Name
    - Contact Name
    - Status
    - Priority
    - Date/Time Opened
    - Owner Full Name
    - GBU
    - BU

Counts of objects are based on the number of records related to all accounts **where the active user is a team member**

Then, the following rules apply:

- Open Opportunities (not closed) where Creation Date > "time range" days ago, for instance creation date > April 28 if today is May 28 and time range is 1 month
- Quotes where where Creation Date > "time range" days ago
- Visit Reports where where Creation Date > "time range" days ago
- Contracts where where Creation Date > "time range" days ago
- Open Cases (not closed/inactive Complaints, Sample Requests, Customer Requests, Customer Specific Requirements) where Creation Date > "time range" days ago

Where "time range" is based on the number of months the user selected on the component.

Data are then filtered by :

- "My Data": The record will be counted if the active user is owner of the record
- "GBU": the record will be counted if the GBU of that record is the same as the one the user Selected (GBUs listed in the filter are the GBU listed in the multi GBU access field of the team member user record)
- "My Team Data": the record will be counted if Ithe active user is on the **record** team (Cases, Opportunities, etc) **or** if the active user is the owner

Custom list views

There is a limitation of 10 records on every list of the home page.

Every list is sorted with oldest records on the top (based on creation date).

My Expiring Opportunities

This component lists open opportunities of the last 12 months where the active user is the owner, with a past Close Date OR a past target date on one of the products (Targeted first delivery date), with 5 columns :

1. Opportunity name
2. Stage
3. Expected Yearly Revenue (with the user currency)
4. Close date
5. Targeted first delivery date (the first occurring)

My Opportunities Without Product or Forecast

This component lists open opportunities of the last 12 months where the active user is the owner, without a product or without a forecast, with 5 columns :

1. Opportunity name
2. Stage
3. Expected Yearly Revenue (with the user currency)
4. Product : A red flag if no products, nothing else
5. Forecast : A red flag if no forecasts, nothing else

My Ongoing Visit Reports

This component lists draft visit reports of the last 12 months where the active user is the owner of the last 12 months, with 4 columns :

1. Type of object / record type
2. Visit report subject / Event subject (link to the record)
3. Date of the visit / Date of the event
4. Contact

My Open Complaints

This component lists open complaints where the active user is the owner (or in a queue that is the owner), with 4 columns :

1. Subject
2. Severity icon (red flag for a Critical severity, orange flag for a Major severity)
3. Status
4. Ship-To Account

My Sample Requests

This component lists not closed sample requests where the active user is the owner (or in a queue that is the owner), with 4 columns :

1. Subject
2. Priority icon (red flag for a High priority)
3. Status
4. Sold-To Account

My Webforms

This component lists not closed webforms where the active user is the owner (or in a queue that is the owner), with 4 columns :

1. Subject
2. Shorten description
3. Status
4. Account name

My Pending Conversion Requests

This component lists “not cancelled” conversion requests where the active user is the owner (or in a queue that is the owner), older first (Created date), with 4 columns :

1. Request number (link)
2. Record Status
3. Account name (link)
4. Account status

My Open Customer Requests

This component lists open customer requests where the active user is the owner (or in a queue that is the owner), with 4 columns :

1. Subject
2. Priority icon (red flag for a High priority)
3. Status
4. Account Name

My Open Customer Specific Requirements

This component lists open customer specific requirements where the active user is the owner (or in a queue that is the owner), with 4 columns :

1. Subject
2. Priority icon (red flag for a High priority)
3. Status
4. Ship-To Account

Security

Who can see this home page ?

- Users on Lightning experience
- Users with an access to the app "CRM Lightning"