FD - P2. Sales Reporting and Analysis

NEW / Next release

R-2314 / Change about massa risus, vestibulum in nunc vitae, sagittis dignissim est.

1. Functional Process

Process Overview

Reporting process in composed of several streams:

- *SFDC standard reporting* please refer to dedicated wiki section in User Guide
- *Analytics (Qlikview)* please refer to dedicated wiki section in User Guide
- ***Visit Preparation Report***
- ***360° Customer View***

Definition & use cases

Definition

Visit Preparation Report and *360° Customer View* are two features design to gather in a single layout data from Salesforce and from Analytics.

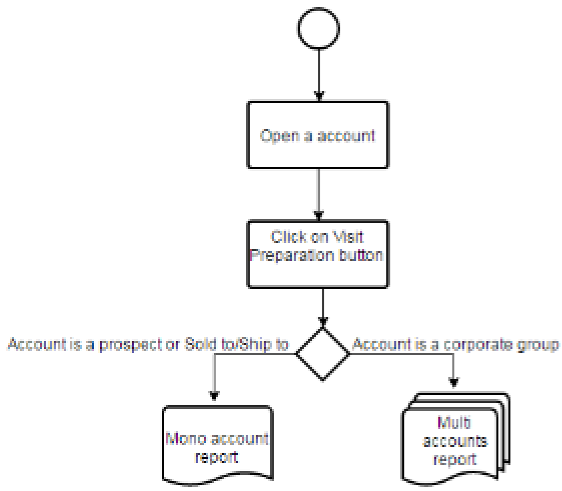
- ***Visit Preparation Report*** : the generation of the report is done via a button on account page. If the account is a Sold To, Ship To, Sold To/Ship To, or a prospect the report is mono-account. We display only the data of the account. If the account is a corporate group, the report is multi-accounts, and the data shown gather all information of all child accounts of the corporate account.
- ***360° Customer View:*** the generation of the report is done via a link in the list view of the object. The report generated is multi-accounts, based on the list of accounts defined by the user.

Use cases

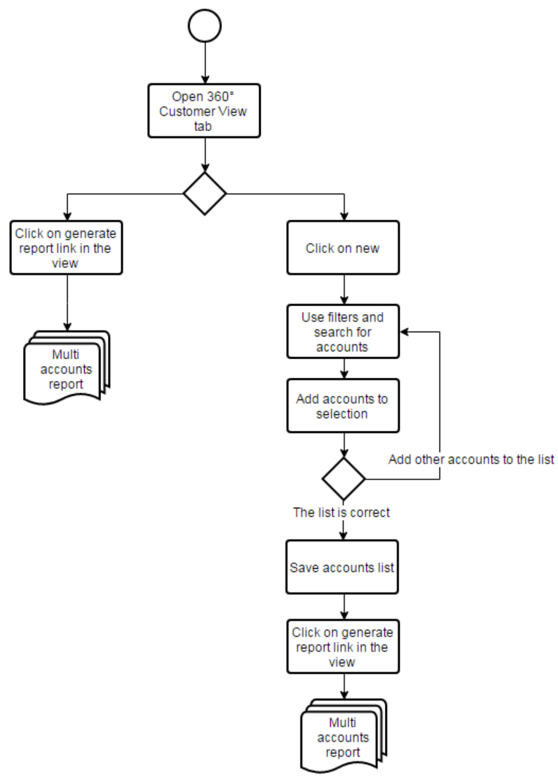
- Have a complete vision of activities between Solvay and a specific customer to prepare his visit.
- Help Salesreps to monitor their portfolios.
- Help manager could have a global vision on the sales rep achievements.

Flows

Visit Preparation report

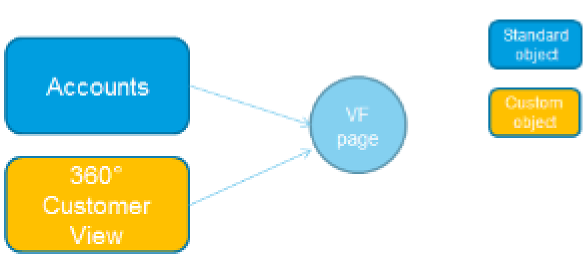


360° Customer View



2. Data Model & security

Main objects



There is only one custom object for the two processes. It allows users to create their own list of accounts and share it with other users before generating the report.

PRS ID & RCS ID are sent to Analytics to get the data of involved accounts.

Note that Visit Preparation Report and 3600 Customer View use the same Visual Force page with different parameters.

Security model

Who can create?	Any user can create an account list.
Who can see?	Users can see the account lists they own. Managers in the role hierarchy can also see.
Who can update?	Users can update the account lists they own. Managers in the role hierarchy can also edit.
Who can delete?	Users can delete the account lists they own.

If a user want to share a list of accounts with specific users, he has to use standard button "Share".
Note that the data users can see in the report (from Qlikview/SFDC) is exactly the same the user can see if he uses Qlikview/SFDC directly.

3. Custom buttons & features

Visit Preparation Report buttons

"Visit Preparation Report" button

This button on the account page allows to generate the report.

"EUR/USD" buttons

This buttons control the currency displayed in the graphs of opportunity and quote section.

"My GBU/All GBUs" buttons

This buttons control the data displayed:

- My GBU: the user sees only the data which correspond to his GBU.
- All GBUs: the user sees the data of his GBU and the records which are "shared".

"Print" button

This button on the report itself allows to print the page or to save it as PDF document using browser feature.

360° Customer View buttons

Filter section - "Search"

This button launch a search on accounts corresponding to the filters. a list of 30 accounts is then displayed in the "Search Result" section. To see more accounts, a "next page" option is available.

Filter section - "Clear"

This button clear the value of all filters.

Selection & search results section - "Add to selection"

In the "Search Result" section, users can tick one or several accounts. Users can also select all the 30 accounts in once by ticking the global checkbox at the top of the section. The button " Add to selection" will then transfer all the selected accounts from the *search results* to the *selection* section.

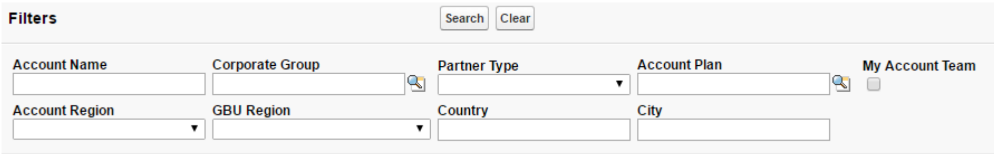
Selection & search results section - "Remove from selection"

In the "Selection" section, users can tick one or several accounts. Users can also select all accounts in once by ticking the global checkbox at the top of the section. The button " remove from selection" will then remove all the selected accounts from *selection* section.

"Save View" button

This button allows the user to save his list of accounts. He will then be able to generate a multi-accounts report from this list.

360° Customer View filters



- *Account Name* Displays all accounts whose name is starting with *
- *Corporate Group* Lookup on accounts filtered on Corporate Group: it displays all child accounts of the corporate account selected in the search result section.
- *Partner type* Displays only accounts with the partner type selected.
- *Account Plan* Displays all the accounts related to the account development plan selected. Note that when this filter is used, all other filters are disabled?
- *My Account Team* Displays all accounts where the user is in the account team.
- *Account region* Displays all accounts with the region selected.
- *GBU Region* Displays all accounts with the GBU Region selected (table from utility used by Peroxides & Soda Ash).
- *Country* Displays all accounts whose country is starting with *
- *City* Displays all accounts whose city is starting with *

Note that the filter logic between filters is a "AND".

4. Specific rules & automation

Visit Preparation Report

The report is composed of 3 parts:

1. Analytics highlights & Sales Performance
2. Analytics Sold & Pending
3. SFDC highlights & details

The two Analytics sections are only displayed if the account is an SAP customer. There are only two currencies available EUR/USD.

Filters of SFDC section:

- Opportunities all open opportunities
- Visit reports If "My GBU" is selected, the last 3 VR corresponding to the GBU of the user are shown with the executive summary. If "All GBUs" is selected the last 3 VR corresponding to the GBU of the user are shown with the executive summary AND the last 3 shared VR of other GBUs are shown without executive summary.
- Complaints Open complaints & closed last 6 months
- Customer requests Open customer request & closed last 6 months
- Sample requests Open sample request & closed last 6 months
- Quotes Accepted & expiration date last 12 months, or open quotes, or Expiration date in the future

Note that if there is no record to display, the section is hidden.

360° Customer View Report

The report is composed of 2 parts:

1. Analytics highlights & Sales Performance (the data is aggregated for all accounts selected).
2. SFDC highlights & details

The Analytics section is only displayed if the account is an SAP customer. There are only two currencies available EUR/USD.

Filters of SFDC section:

- Opportunities All open opportunities sorted by Expected yearly revenue descending
- Visit reports Last 10 visit reports sorted by date of the visit descending. The executive summary is displayed only for the 3 most recent VR.
- Complaints Open complaints & closed last 6 months sorted by severity
- Customer requests Open customer request sorted by created date
- Sample requests Open sample request & closed last 6 months sorted by creation date
- Quotes Accepted & expiration date last 12 months or Open quotes or Expiration date in the future sorted by “Price Validity to” date descending.

In tables, Account, country, and city are added for multi-accounts report. The graphs of opportunity and quote sections are hidden for multi-accounts report.

Note that if there is no record to display, the section is hidden.

5. History

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Last modifications :

User	Last Update
Julien Andreoli-ext	3312 days ago
BRAHIM, Walid	
KANJA-ext, Zakaria	
NWANGWU, Daniel	