

Customer 360° dashboard



Overview

- [Link to the dashboard](#)
- [Onboarding video](#)
- [Starting guide](#)

General Description

Customer 360 Dashboard has been engineered to provide a full and comprehensive view on external sales, by [Customer \(corporate group\)](#).

A new concept of direct / indirect sales has been introduced for each Customer at Corporate Group level. For a given Corporate Group :





1. [Direct Sales](#) : when SoldTo Group = Corporate Group code
2. [Indirect Sales](#) : when ShipTo KA = Corporate Group code (and SoldTo Group <> Corporate Group Code).

=>Each Customer we want to see in the drop down list needs to be added in the dashboard configuration file, otherwise Corporate Group / SoldTo / ShipTo will only be accessible using the search bar, and direct / indirect sales split can't be performed.

Authorization & Rights

Ask for your access using the [Access form](#)

See the list of approvers in the Access Management section at the bottom of the page

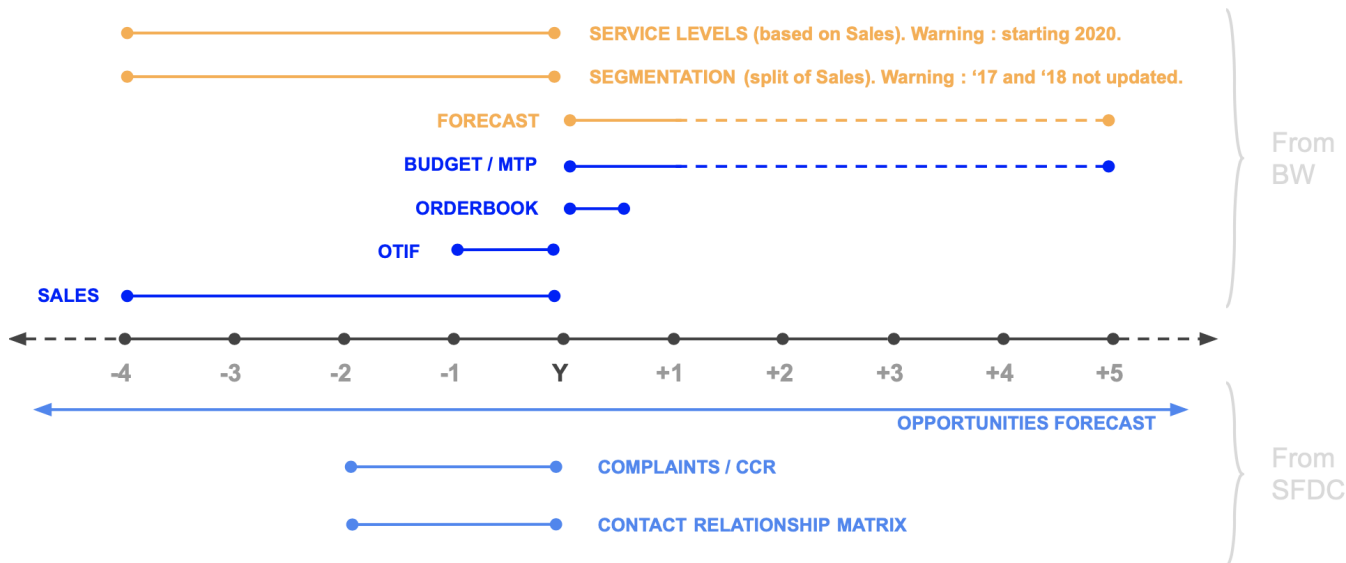
| Financial | Customer Experience & Interaction | Opportunities | Segmentation | |
|--|--|---|--|---|
|  <ul style="list-style-type: none"> • Revenue • Volume • ICM • Orderbook • Forecast • Budget • Opportunities • Payment Terms • Overdues • DSO / Best DSO |  <ul style="list-style-type: none"> • OTIF • NPS • Complaints • Contact Relationship Matrix and Interactions |  <ul style="list-style-type: none"> • Weighted / Unweighted expected revenue • # of opportunities • Weighed revenue at stake • Top opportunities • Details of opportunities + links to SFDC |  <ul style="list-style-type: none"> • Split of sales by GBU segment • Split of sales by Corporate segment • Segment evolution between 2 periods | <ul style="list-style-type: none"> • Dev • tar • g • Top • Nan • Dev • SCF |

Dimensions

| Sales Report (Sales, OB, Budget, MTP, forecast) | Complaints | Opportunities | Service Levels |
|--|--|--|--|
| <p style="text-align: center;">Overdues ★</p> <p style="text-align: center;">OTIF ★</p> | | | |
| <ul style="list-style-type: none"> • Customer (direct indicators) = Corporate Sold-To Group ★ • Customer (indirect indicators) = Ship-To KA (excl. what is counted as direct based on Corp. Sold-To Group) • For overdues ★, assumption is made that Customer = Payer Group | <ul style="list-style-type: none"> • Customer = Corporate Sold-To Group • No "indirect" indicators | <ul style="list-style-type: none"> • Customer (direct indicators) = Corporate Sold-To Group • No "indirect" indicators | <ul style="list-style-type: none"> • Customer (direct indicators) = Corporate Sold-To Group • No "indirect" indicators |

| | | | |
|---|---|---|--|
| <ul style="list-style-type: none"> • Year   • Quarter   • Month Year   | <ul style="list-style-type: none"> • Year • Quarter • Month Year | <ul style="list-style-type: none"> • Opport. Close date • Opport. Forecast Y • Opport. Target First Delivery date | <ul style="list-style-type: none"> • Month Year |
| <ul style="list-style-type: none"> • GBU   • Grp of Act.   • Activity • Company (PRS) • Plant • Sales Rep | <ul style="list-style-type: none"> • GBU | <ul style="list-style-type: none"> • GBU • Grp. of Act. • Opport. Owner | <ul style="list-style-type: none"> • GBU • Grp. of Act. • Plant • Plant Zone • Manuf. Plant • Market Cluster • Team Cluster |
| <ul style="list-style-type: none"> • Customer (see upper) • SoldTo Group • SoldTo • ShipTo Group  • ShipTo  • ShipTo KA • Region (shipTo) • Country (shipTo) • Group Segment • GBU Segment • <u>Only Overdues</u> :  Payer and Payer Group (PRS) | <ul style="list-style-type: none"> • Customer (see upper) • Corporate Group • ShipTo | <ul style="list-style-type: none"> • Customer (see upper) • Corporate Group • OEM Corporate Group • Account • Region | <ul style="list-style-type: none"> • Region (ShipTo) ? • Sold-To Group • Sold-To • Group Segment • GBU Segment |
| <ul style="list-style-type: none"> • Product Hier. • GBU Prod. Fam. • Product (lv14) • Material (lv15) • Market • Segment • Application • End-use | | <ul style="list-style-type: none"> • Product (lv14) • Market • Segment • Application • End-use | |
| <ul style="list-style-type: none"> • GBU dimensions (Sales Only) : <ul style="list-style-type: none"> ◦ AERO Market ◦ AERO Program ◦ AERO Specification | | | |
| <ul style="list-style-type: none"> • Consolidated (Y/N) • Restated scope • Data scope  • Data source  • Source System | <ul style="list-style-type: none"> • Justified (Y/N) • Motive • Severity • Internal Complaint (Y/N) | <ul style="list-style-type: none"> • Opport. ID • Opport. Name • Opport. Active Status • Opport. Business Type • Stage Group • Stage • Opportunity Visibility • Data Source | <ul style="list-style-type: none"> • Service Level |

Period of Analysis



| | |
|-------------------------------------|---|
| Financials | Sales : from Y-4 to Y (YTD) Orderbook : from M to M+6 (M+2 in the graphs, M+6 in report) Budget / MTP / Forecast : from M to M+12, more if the GBUs load more (max. 5 years) |
| Cust. Exp & Interactions | OTIF : Y and Y-1 NPS : depends on the NPS campaigns entered in the flat file. No filter on dashboard side. CCR / Complaints : from Y-2 to Y Contact Relationship Matrix and Interactions : from Y-2 to Y |
| Opportunities | No limit. The forecast years depends on each opportunity (from - to +). |
| Segmentation | Based on the sales : from Y-4 to Y (YTD). Warning : segmentation dimension is not updated before 2019. It becomes accurate starting 2019. |
| Service Levels | Based on the sales : from Y-4 to Y (YTD). Warning : the service level data starts in 2020 only. |

Currencies, units and exchange rate

| Financial | Customer Experience & Interaction | Opportunities | Segmentation | Service Levels |
|--|-----------------------------------|--|--|------------------|
| <ul style="list-style-type: none"> • EUR • USD | N/A (No revenue) | <ul style="list-style-type: none"> • EUR • USD | <ul style="list-style-type: none"> • EUR • USD | Fees in k€ |
| CAR3 (past) CAR4 (future) | N/A (No revenue) | TBC | CAR3 (based on sales) | N/A (No revenue) |
| <ul style="list-style-type: none"> • T • k Lb • Sh. T | N/A (No volume) | <ul style="list-style-type: none"> • T • k Lb • Sh. T | <ul style="list-style-type: none"> • T • k Lb • Sh. T | N/A (No volume) |

Refresh frequencies and sources

| Financial | Customer Experience & Interaction | Opportunities | Segmentation | Service Levels |
|---|--|---|---|---|
| <ul style="list-style-type: none"> • Daily for current month and previous month • Weekly (in the Week-end) for earlier data | <ul style="list-style-type: none"> • Daily for CCR, OTIF, Contact Matrix and Interactions • Manually at each NPS campaign (yearly) for NPS | <ul style="list-style-type: none"> • Daily | <ul style="list-style-type: none"> • Daily for current month and previous month • Weekly (in the Week-end) for earlier data | <ul style="list-style-type: none"> • Daily |
| All data from BW | <ul style="list-style-type: none"> • BW for CCR (Orderlines), OTIF • SFDC (Core / iCare) for CCR (complaints) and Matrix and Interactions • Flat file for NPS | <ul style="list-style-type: none"> • SFDC (Core / iCare) | All data from BW (based on sales) | Services Levels defined in SAP and tracked in BW |

Further Improvements:

WO000000632900

We have pulled 5 years of historical data for following GBU's and went to production on DEC 19th 2024.

CH = Special Chem, SI = Silica, SD = Soda Ash, CT= Coatis, PE = Peroxides

WO000000739810

Added "sales office" dimension in the filter. This went live on Dec 19th 2024.

Field added in below Application:

Query: \$(VS_QLIK_ENV)_QVSBS_BW_QRY_MVCOPA01_0004

Application: Extractor: QVSBS_BW_QRY_MVCOPA01_0004_1_COMMON

Application: QVSBS_BW_QRY_MVCOPA01_0004_2_C360

Application: Customer 360 Dashboard - SLV

