



ABC PHARMA

SAMPLE

Quick Reference Guide

November 2021

© 2021 LPW Training Services, LLC. All Rights Reserved

Contents

Logging In 3

Exporting Data 4

Saving Filters / Views..... 5

Sales Dashboard 6

Downloading Data to PowerPoint 7

Sales Detail 8

Competitor Dashboard 9

Calls Dashboard 10

Help & Support..... 11

SAMPLE

Logging In

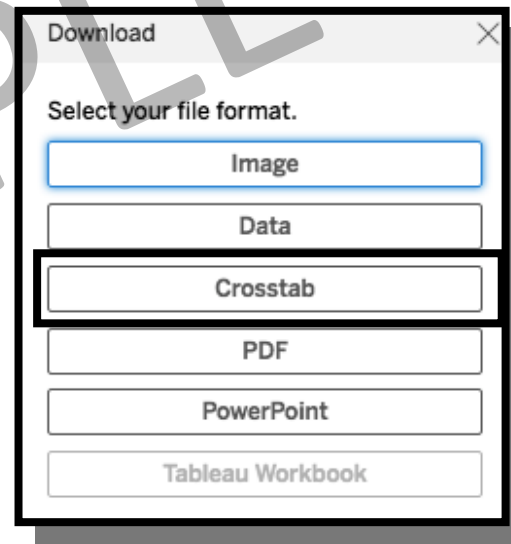
Logging in to XXXXXX

1. Enter the following URL in your browser:
<https://sso.online.xxxxx.com/public/xxx/SSO>
2. Bookmark this link.
3. Enter your **EMAIL ADDRESS** and your **PASS-WORD**.
4. Click in the '**Remember me**' checkbox.
5. Click the **Sign in** button.



Exporting Data to Excel

1. Select the desired Dashboard.
 2. Click **Download** from the toolbar.
 3. Select **Crosstab**.
 4. Select the desired worksheet(s).
 5. Select the desired format (Excel or CSV).
 6. Click the **Download** button.
 7. Name the file and save it to the desired file location.
 8. Click **Save**.
- Note:** The file is downloaded and available at the bottom of the screen.
9. Open the file and format, as desired.



ABC PHARMA

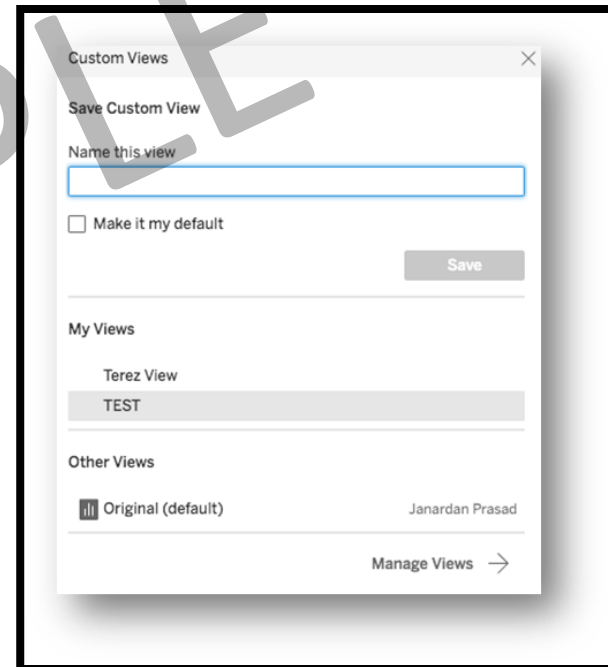


Saving Filters / Views

1. Select the desired Dashboard.
2. Select the desired filters.
 - a. Date
 - b. Account(s)
 - c. Sort By
3. Click the **View Selector** on the menu bar.
4. Enter a name for your view.
5. Click the **Save** button.
6. Click the **Make it my default** checkbox to set the view as your default for the selected dashboard.
7. Click **Manage Views** to Edit (*rename*) or Delete a saved view.



ABC PHARMA



veeva

Sales Dashboard

- **Data Source** - XXXXXX
- **New Account** – Accounts that prescribed within the last XX days
- **Inactive Account** – Accounts that once prescribed but have not prescribed within the last XX days
- **Contest** – Sales contest

