



Lead and Opportunity Management Dashboards for Salesforce, by CloudAmp

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Report Name	Dashboard Name	Report Filter 1 (Ownership)	Report Filter 2 (Date Range)	Report Filter 3	Report Filter 4	Report Filter 5	Notes
Leads by Day	Lead Dashboard	All Leads	Created Last 60 Days				
Leads by Week	Lead Dashboard	All Leads	Created Last 120 Days				
Leads by Month	Lead Dashboard	All Leads	Current & Prev CY				
Leads by Status	Lead Dashboard	All Leads	Created Last 90 Days				
Last 10 Leads	Lead Dashboard	All Leads	Row Limit 10				
Leads by Week by Creator (Last 120 Days)	Lead Dashboard	All Leads	Created Last 120 Days				
Leads Converted by Week	Lead Dashboard	All Leads	Created Current CY	Converted = True			
Lead Conversion Rate	Lead Dashboard / Sales Team & Pipeline Dashboard	All Leads	Created Last 90 Days				New July 2024
Opportunities by Stage	Opportunity Dashboard	All Opps	Current & Next Qtr.	Opp Status Open			
Revenue Closed this Quarter	Opportunity Dashboard	All Opps	Close Date Current CQ	Opp Status Closed Won	Probability All		
Opportunities Closed per Month (Won/Lost)	Opportunity Dashboard	All Opps	Close Date Current CY	Opp Status Closed	Probability All	Row Limit 10	
Top 10 Open Opportunities	Opportunity Dashboard	All Opps	All Time	Opp Status Open	Probability All	Row Limit 10	
Last 10 Won Opportunities	Opportunity Dashboard	All Opps	Close Date Current CY	Opp Status Closed Won	Probability All	Row Limit 10	
Average Age of Opportunities	Opportunity Dashboard	All Opps	Current & Next CQ	Opp Status Open	Probability All		
Open Opps by Close Date and Stage	Opportunity Dashboard	All Opps	All Time	Opp Status Open	Probability All		New July 2024
Opportunity Win Rate (this Qtr)	Opportunity Dashboard / Salesteam Lead & Deal Dashboard	All Opps	Close Date Current CQ	Opp Status Closed	Probability All		New July 2024
Opportunity Win Rate (by Month)	Sales Team & Pipeline Dashboard	All Opps	Close Date Current & Prev CY	Opp Status Closed	Probability All		New July 2024
Open Opps by Close Date and Rep	Sales Team & Pipeline Dashboard	All Opps	All Time	Opp Status Open	Probability All		New July 2024
Won Opps by Qtr. by Rep	Sales Team & Pipeline Dashboard	All Opps	Close Date Current & Prev CY	Opp Status Closed Won	Probability All		New July 2024
Lost Opps by Qtr by Rep	Sales Team & Pipeline Dashboard	All Opps	Close Date Current & Prev CY	Opp Status Closed	Probability All	Opp Stage Closed Lost	New July 2024
Leads Created by Rep, Last 90 Days by Wk	Sales Team & Pipeline Dashboard	All Leads	Created Last 90 Days				New July 2024
Leads Created by Rep	Sales Team & Pipeline Dashboard	All Leads	Close Date Current & Prev CY				New July 2024
Leads Converted by Rep, Last 90 Days by Wk	Sales Team & Pipeline Dashboard	All Leads	Created Last 90 Days	Converted=True			New July 2024
Leads Converted by Rep	Sales Team & Pipeline Dashboard	All Leads	Close Date Current & Prev CY	Converted=True			New July 2024
Activities on Leads	Sales Team & Pipeline Dashboard	All Leads	Current CY	Completed Activities	Tasks and Events	Assigned Role contains Sales	New July 2024
Completed Activities	Sales Team & Pipeline Dashboard	All Activities	Current CY	Completed Activities	Tasks and Events	Assigned Role contains Sales	New July 2024
Won Opp Size by Sales Rep	Sales Team & Pipeline Dashboard	All Activities	Close Date Current CY	Opp Status Closed Won	Probability All		New July 2024