



Install Free Lead and Opportunity Dashboards for Salesforce: Demo & Docs

See how you can accelerate your GTM efforts by installing these free [Lead, Opportunity and Sales Team Dashboards](#), and get a head start on understanding your sales and marketing data in Salesforce.

You can install these free dashboards from CloudAmp in just a few minutes.

Watch the demo video for proof (it takes just 3 minutes 33 seconds), or follow the steps below if you prefer documentation. There is never any cost to use the dashboards, they are yours completely free.

Dashboard Installation Demo Video

 CloudAmp Lead and Opportunity Dashboards Installation Video

How to Install the Salesforce Dashboards

To install CloudAmp's [FREE Lead and Opportunity Dashboards for Salesforce](#) app, just follow these easy steps:

1. Go to the listing for the [lead and opportunity dashboards](#) on the Salesforce AppExchange

2. Click the **Get it Now** button

Get It Now



👍 **Protip:** Production or Sandbox?

Our recommendation is to install the lead and opportunity management dashboards in your **Production** Salesforce Org, so you can immediately see your data loaded in the dashboards.

To install in production, click the “Get it Now” button:

[Get It Now](#)

The app consists only of Salesforce reports and dashboards, all 100% Salesforce native, with no code or integrations to other systems. So generally you can just install in Production, and proceed with customizing the reports to fit your organization’s needs.

Larger companies may have a change management process around making configuration changes to Salesforce, regardless of how small the changes are.

For those companies, installing in **Sandbox** is likely to be a better first step. You will of course need a sandbox, preferably a Partial or Full Sandbox so that you can see the dashboards with some of your own data.

To install in sandbox, click the “Try it Free” button on the AppExchange listing (this is slightly misleading, since the “Get it Now” button also allows you to try it free -- our dashboards app never requires payment).

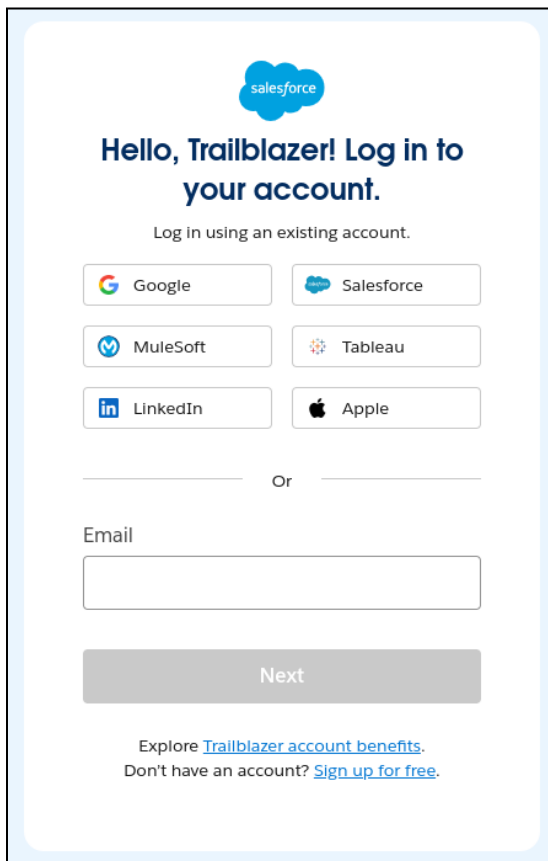
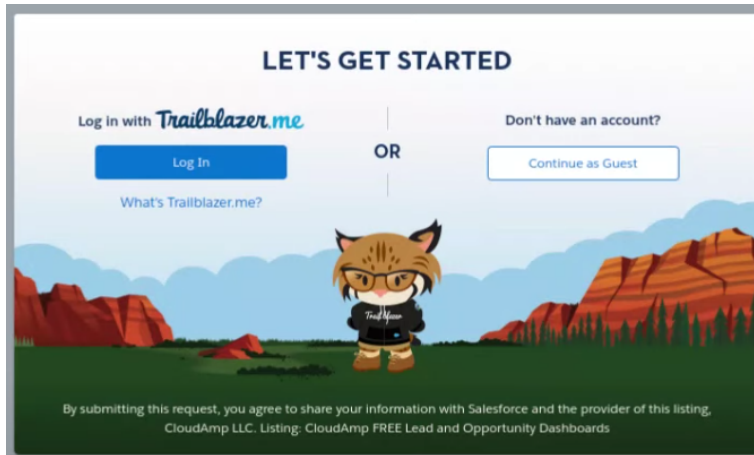
[Try It Free](#)

Installing in a sandbox that doesn’t have some of your data, or in a developer account is generally not recommended, since the dashboards are only interesting or useful when there is data to populate their reports and charts.



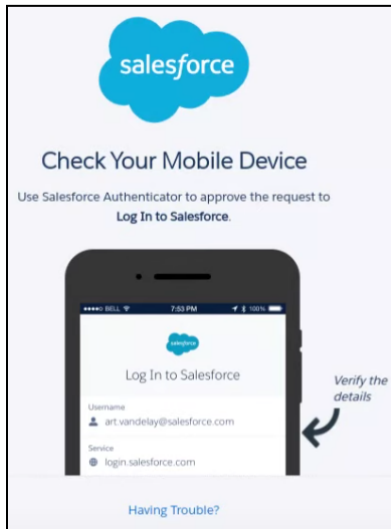
3. **Login** to Salesforce

Your Trailblazer login connects to all of your Salesforce accounts



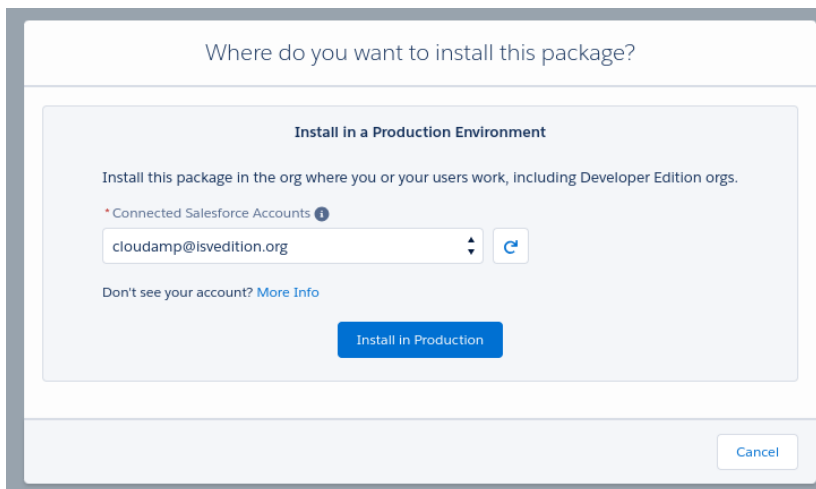


4. Authenticate (if required)



5. Choose your Salesforce Org (if required)

- a. This step is only required if you have login access to more than one Salesforce production environment.





6. Select the checkbox that you agree to the terms and conditions
 - a. Click the **Confirm and Install** button

Confirm Installation Details

[Review the customization guide](#) for installation and configuration steps.

Package	Lead and Opportunity Dashboards by CloudAmp (CloudAmp Dashboards)	Username	cloudamp@isvedition.org
1.7 / 1.7.0		Version	
Subscription	Free	CloudAmp Dashboards 1.7 / 1.7.0	
Duration	Does Not Expire	Organization	CloudAmp LLC
		Number of Subscribers	Site-wide

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	David	* Company	CloudAmp LLC
* Last Name	Hecht	* Country	United States
Job Title	Founder	* State/Province	California
* Email	david@cloudamp.com		
Phone			

☐ I have read and agree to the terms and conditions.

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

☒ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)

7. **Login** to Salesforce again
8. Authenticate again (if required)
9. Choose your installation type
 - a. We recommend **Install for All Users**

 **Install Lead and Opportunity Dashboards by CloudAmp**
By CloudAmp LLC

 ☐ Install for Admins Only	 ☒ Install for All Users	 ☐ Install for Specific Profiles...
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[Install](#) [Cancel](#)

App Name	Publisher	Version Name	Version Number
Lead and Opportunity Dashboards by CloudAmp	CloudAmp LLC	CloudAmp Dashboards 1.6	1.6

Additional Details [View Components](#)



10. Click **Done**

- a. If you get the message that it is taking too long to install

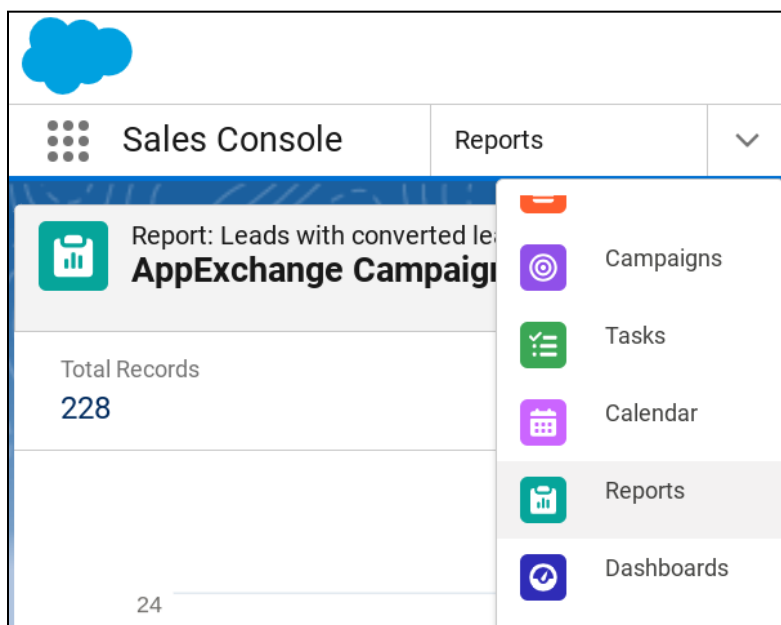
11. Go to the **Dashboards** tab

- a. Go to the **Dashboards** tab using the **App Launcher**



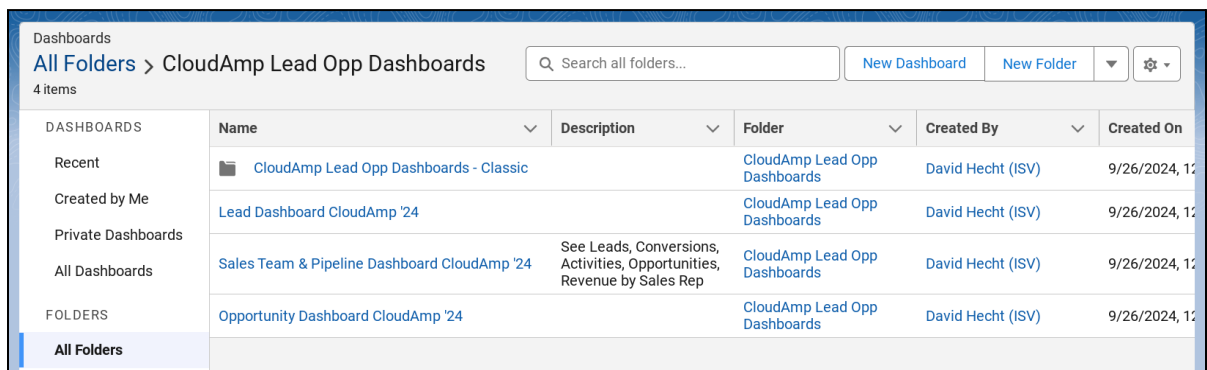
- b. Or

Select **Dashboards** from the down arrow beside your first tab if you are using Sales Console or Support Console



12. Click **All Folders** on the left navigation

13. Select the **CloudAmp Lead Opp Dashboards** folder





14. Click on one of the 3 dashboards
 - a. Choose Lead, Opportunity, or Sales Team
 - b. The Classic folder is the original 2014 version of Salesforce Classic users
15. Click **Refresh** top right
Dashboards in Salesforce do not automatically refresh data unless you click the button
16. Customize your dashboards
 - a. Click on any chart to view the underlying report
 - b. We recommend "Save as" to preserve copies of the original reports
 - c. Add filters to the reports as needed to fit your Salesforce data better
 - d. Top customization examples:
 - i. Add a filter to Lead reports to exclude certain types of leads, such as those from a tradeshow
 - ii. Add a filter to the Opportunity reports to only show certain custom opportunity stages or owners
 - iii. Add a filter to the sales team reports with the names of your sales reps only (by default it shows anyone with a sales role assigned to their user)
17. Questions? [Contact Us](#) for assistance!

Additional Resources

CloudAmp

- [Free Lead, Opportunity, and Sales Team Dashboards for Salesforce](#)
- [5 Big Ways to Maximize Your Salesforce Dashboards](#)
- [How to Customize Salesforce Dashboards](#)

Salesforce

- [Reports & Dashboards: Quick Look](#)
- [Reports & Dashboards for Lightning Experience](#)
- [Explore Lightning Experience Reports & Dashboards](#)