

Sales history advanced dashboard – Setup Guide

Installation

You just need to follow the steps and automatically, this will create:

- a new report folder : sales history advanced reports containing 6 reports:



Reports
Sales history advanced reports

Folder Sales history advanced reports [Edit](#) [Create New Folder](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W |

[Create New Custom Report](#) [Create Report With Report Builder](#)

Action	Report Name ↑	Description
Edit Del Export	Sales history - # won opps vs value	Monthly history of sales comparing the number of won opps and the total value
Edit Del Export	Sales history - Daily sales history	Comparison on the sales history of each month day per day
Edit Del Export	Sales history - history of the growth	Month per month growth analysis
Edit Del Export	Sales history - monthly comparison	Monthly comparison of sales in the last 2 years
Edit Del Export	Sales history - Monthly sales summary	Monthly sales summary comparing total amount, max amount and average
Edit Del Export	Sales history - Win rate history	Win rate history vs target

- a new dashboard folder : sales history advanced dashboard containing the following dashboard

