

Sales KPIs Dashboard

Installation Guide



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Installing the Sales KPI Dashboard into your salesforce.com Environment

Sales KPI Dashboard 1.0

This Dashboard contains graphs to help you determine the efficiency of your operational business. The different components aggregate relevant sales key performance figures and help Sales Managers to take corrective actions where appropriate

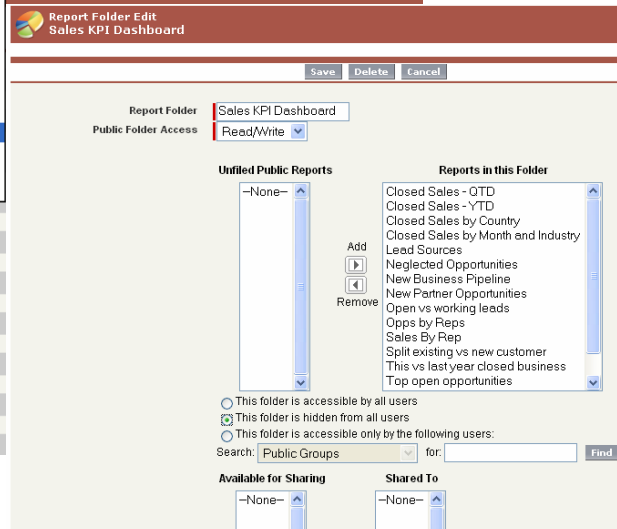
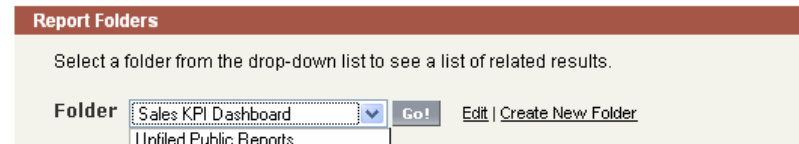
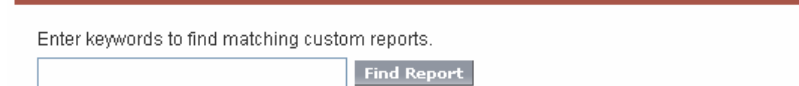
■ Setup

- ▶ Once you have clicked the install button on Appexchange (Get in now) the relevant dashboard components and their underlying reports will be installed in your productive salesforce.com environment
- ▶ Once the download has finished you will see a new Report folder called "Sales KPI Dashboard" under your Report Tab
- ▶ This Folder contains all the reports the different dashboard components refer to





Adjusting the Sales KPI Report Folder - Initial restricted Access through the Admin



■ Setup

- ▶ In order to restrict the access to these new reports choose the Sales KPI Dashboard folder and click on Edit
- ▶ Choose "This folder is hidden from all user".
- ▶ Only your admin user will have access to the reports and the Dashboard
- ▶ Customize the dashboard and the reports according to your needs
- ▶ Rollout the Sales KPI Dashboard to the users by a phased approach (add specific user profiles in the "Available for Sharing" section)
- ▶ Have fun and maximize the value of salesforce.com for your organization



Thank you



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