12 CHARTS

GSP SALES DASHBOARD (ENTERPRISE+)
CONFIGURATION GUIDE

TIPS FOR INSTALLING AND ADAPTING THE DASHBOARD

GSP.

GSP Sales Dashboard (Enterprise+)

Tips for installing and adapting the dashboard

The GSP Sales Dashboard (Enterprise+) package provides robust visibility of sales performance and the sales pipeline.

The package includes a comprehensive dashboard and underlying reports. It also includes three pipeline quality metrics for the Opportunity object that are also included in a dashboard chart.

Please note the package is intended for Enterprise Edition and above. This is because one of the reports (Short Term Pipeline Trend) requires the Historical Trending feature be enabled...

(don't worry, this is really easy to do).

Unfortunately, the Historical Trending feature is not available in Professional Edition. A version of the dashboard compatible with Professional Edition is also available here.

Incidentally, the dashboard is built in the salesforce Classic Interface. However it can be installed into a Lightning-enabled environment and adapted in the usual way.

The purpose of this document is to:

1. Explain to how to enable the Historical Trending feature.

2. Provide hints and tips on how specific charts and reports can be adapted to suit the specific needs of your business.

3. Highlight other free related resources and explain how to get further support from GSP.

So here we go.

1. Historical Trending
(Do this before installing the package).

To enable Historical Trending:

1. Click Setup.
2. Search for Historical Trending in the Setup search box.
3. Click Historical Trending.
4. Click on Opportunity.
5. Check the box marked Enable Historical Trending.
6. Click Save.

That's it. (If you've done this previously then you don't need to do anything).

2. Ways to adapt the reports

The dashboard and underlying reports are ready to use out-of- the-box.

Optionally there's several adjustments you can make based on your own business needs. Some of these adjustments apply to multiple reports (e.g. Summary levels), other relate to specific reports.

Report Timescales

Reports that show data on Closed Won opportunities are based on Current Financial Year. Feel free to modify this to a different period (e.g. Calendar Year) if appropriate.

The pipeline reports have no default timescale i.e. they show all pipeline opportunities. If you want the report to show only deals due to close in a given period (e.g. this quarter) then modify the timescale setting.

Summary Levels

Some reports summarize Opportunities at the individual Owner level. If your business has a large sales team then modify the report to 'Group By' Territory, Region, Country or any other field used to structure your sales team.

You may also want to adjust the reports to run on My Team's Opportunities or My Opportunities.

Sales Metrics

The package adds three fields to the Opportunity object that provide additional pipeline quality metrics.

Number of Close Date Month Extensions. Counts the number of times the Close Date has moved from one month to another.

Number of Days Since Last Stage Change. Number of days since the Opportunity Stage was last updated.

Days Open. Number of days the Opportunity has been open. Stops counting when the Opportunity is set to Closed.

We recommend adding these fields to the Opportunity Page Layout so that salespeople and sales managers can get insight into the quality of each deal. Adjust the Field Level Security of these three fields to make the information visible to relevant User Profiles.

The metrics will automatically start to count for new Opportunities created from the date the package is installed.

You can also update the pipeline quality metrics so that they start to apply for existing opportunities. To do this, use an Opportunity List View or the Apex Data Loader to update the "# Close Date Extensions" and "# Close Date Month Extensions" to 0.

Historical Stages

There are two charts the provide information on the trend in the size of the pipeline. These are the Long Term Pipeline Trend and the Short Term Pipeline Trend.

In both cases, the underlying report filters out the historical stages of Closed Won and Closed Lost.

If you have used additional Opportunity Stage values for Won or Lost (e.g. Qualified-Out) then we recommend adding these to the filter on both reports. This means that for each period, the chart and report will only show what was in the pipeline at the time.

Sales Versus Target

The Sales versus Target dashboard gauge has initial settings that determine the red, amber and green segments. Modify these values by clicking Edit on the Dashboard and the spanner symbol next to the gauge. Enter values appropriate to your business.

3. Additional Resources

Here are three additional resources that will help you use the dashboard and reports to drive sales performance.

12 Charts eBook

This eBook gives advice on how to use each dashboard chart effectively. It includes examples of the insights each chart provides to managers and salespeople.

You can download the eBook from this page on our website.

12 Charts blog post

This is our most popular blog post. It contains additional detail on each dashboard chart plus videos and further links to chart-specific blog post. A comprehensive resource.

Visit our blog post, 12 Charts That Should Be On Your Salesforce Dashboard for links to additional resources and chart-specific videos.

Further support from GSP

We provide a comprehensive range of services to help you get the most from salesforce and marketing automation platforms. Find out more on our website.

We also have a range of other Apps that will increase your salesforce benefits. These include the GSP Product Selection Wizard, Auto Price Book Selector and the Target Tracker. Visit our Apps page for more information.

We also welcome feedback and questions about the dashboard package.

Call us on **+44 203 280 3665** or visit our Contact Us page.