

# 7 Salesforce Dashboards You Need To Grow and Manage Your Sales Pipeline

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## Build these 7 Salesforce dashboards

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# Introduction

The state of your sales pipeline can say a *lot* about your business.

By creating visibility into your pipeline, you can better understand the status of sales efforts, ensure that teams are planning the right sales activities, and improve overall forecasting.

We've compiled 7 Salesforce dashboards that we believe will create this visibility, helping you to manage and grow your sales pipeline more effectively. We've broken it down into three sections that will reveal insights into not only your pipeline, but your team's performance and data's health:

1. Pipeline Visibility
2. Pipeline Planning
3. Pipeline Cleaning

Each dashboard is built from what we believe are the three most important metrics for success — the goal is to help you build upon these insights to create dashboards that meet the unique needs of your team and organization.

Let's get started!

# Before you begin

## Overview of Reports and Dashboards

Salesforce is equipped with many powerful features, two of which work together to help you view, organize, and analyze your data: Reports and Dashboards.

### Reports

A report returns a set of data that meets criteria defined by the user.

### Dashboards

A dashboard displays this data visually as components.

In order to build the following dashboards, we'll first need to set up the necessary reports. We'll quickly walk through this process as a refresher. If you're already a reporting whiz, then you can skip to Page 7.

## How to create a report in Salesforce

1. Click on Reports tab
2. Click *New Report*
3. Select object
4. Click *Create*
5. Select filters, including date field, range, table type, and columns
6. Name the report
7. Click *Save* to create the report

## How to create a dashboard in Salesforce

1. Click on Dashboards tab
2. Click *Go To Dashboard List*
3. Click *New Dashboard*
4. Select the data source
5. Select the component type
6. Select the parameters
7. Name the dashboard
8. Click *Save* to create the dashboard

We'll show you how to set up each report and customize your dashboard components.

# Pipeline Visibility

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Understand the state of  
your sales activity from  
top to bottom.

# 1 State of The Union Dashboard

Gain visibility into sales success across the organization.

The State of The Union Dashboard reveals the status of sales efforts over time, but also what's on the horizon. It's a simple way to show how sales is contributing to the success of your organization. You'll create the following reports: *Sales History - Monthly Comparison*, *Total Sales Closed - This Month*, and *Individual Sales*.

## STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Sales History - Monthly Comparison</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Closed / Won</li><li>• Probability = All</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current and Previous CY (or FY if you run on a fiscal year)
<b>Table Type</b>	Matrix
<b>Columns</b>	<ul style="list-style-type: none"><li>• Close Date 1 (group dates by calendar month in year)</li><li>• Close Date 2 (group dates by calendar year)</li><li>• Amount (sum this field)</li><li>• Account Name</li><li>• Opportunity Name</li><li>• Any additional column you need</li></ul>

<b>Report Name</b>	<b>Total Sales Closed - This Month</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Closed / Won</li> <li>• Probability = All</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	This Month
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Close Date (group dates by calendar day in month)</li> <li>• Opportunity Name</li> <li>• Amount</li> <li>• Account Name</li> </ul>

<b>Report Name</b>	<b>Individual Sales</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Closed / Won</li> <li>• Probability = All</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Calendar Year or Fiscal Year
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Owner</li> <li>• Amount (sum this field)</li> </ul>



## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

Sales Report - Monthly Comparison	
Component Type	Horizontal Bar Chart
Parameters	<ul style="list-style-type: none"><li>• Y-Axis: Close Date 1 and Close Date 2</li><li>• X-Axis: Sum of Amount</li><li>• Show Values: Checked</li></ul>

Total Sales Closed - This Month	
Component Type	Gauge Chart
Parameters	<ul style="list-style-type: none"><li>• Measure: Sum of Amount</li><li>• Show Range: Checked</li><li>• Set your segment ranges</li></ul>

Individual Sales	
Component Type	Horizontal Bar Chart
Parameters	<ul style="list-style-type: none"><li>• Y-Axis: Opportunity Owner</li><li>• X-Axis: Sum of Amount</li><li>• Show Values: Checked</li></ul>

## 2 Sales Team Dashboard

Gain visibility into the sales team's pipeline.

The Sales Team Dashboard shows what opportunities are currently in the pipeline. It's also a great way to create some healthy competition by incentivizing reps to fill up their pipelines with the most opportunities. You'll create the following reports: *Sales Pipeline*, *Annual Sales By Industry*, and *New Opportunities By Lead Source*.

### STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Sales Pipeline</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Any</li><li>• Probability = All</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Opportunity Owner</li><li>• Account Name</li><li>• Amount (sum this field)</li><li>• Close Date</li><li>• Group By: Stage</li></ul>

<b>Report Name</b>	<b>Annual Sales By Industry</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Closed / Won</li> <li>• Probability = All</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Name</li> <li>• Account Name</li> <li>• amount (sum this field)</li> <li>• Group By: Industry</li> </ul>

<b>Report Name</b>	<b>New Opportunities By Lead Source</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Any</li> <li>• Probability = All</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Name</li> <li>• Account Name</li> <li>• Amount (sum this field)</li> <li>• Close Date</li> <li>• Stage</li> <li>• Created Date</li> <li>• Opportunity Owner</li> <li>• Group By: Lead Source</li> </ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

Sales Pipeline	
Component Type	Gauge Chart
Parameters	<ul style="list-style-type: none"><li>• Measure: Sum of Amount</li><li>• Show Range: Checked</li><li>• Set your segment ranges</li></ul>

Annual Sales By Industry	
Component Type	Legacy Table
Parameters	<ul style="list-style-type: none"><li>• Industry</li><li>• Sum of Amount</li><li>• Show Chatter Photos: Checked</li><li>• Sort Rows By: Value Descending</li></ul>

New Opportunities By Lead Source	
Component Type	Horizontal Bar Chart
Parameters	<ul style="list-style-type: none"><li>• Y-Axis: Lead Source</li><li>• X-Axis: Sum of Amount and Average Amount</li><li>• Show Values: Checked</li></ul>

# 3 Sales Rep Dashboard

Gain visibility into an individual sales rep’s pipeline.

The Sales Rep Dashboard provides sales reps with performance metrics, allowing them to clearly understand the state of their pipeline. Likewise, it holds reps accountable to their goals and activities — especially if they share this dashboard with their manager. You’ll create the following reports: *Total Closed This Month*, *Bottom Of Funnel*, and *Sales Activities Last Week*.

## STEP 1: Build the Reports

*(refer to page 4 for report creation steps)*

<b>Report Name</b>	<b>Total Closed This Month</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Closed / Won</li><li>• Probability = All</li><li>• Opportunity Owner = [Name of Sales Rep]</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	This Month
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Opportunity Name</li><li>• Total Contract Value (sum this field)</li><li>• Account Name</li><li>• Group By: Close Month</li></ul>

<b>Report Name</b>	<b>Bottom Of Funnel</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Open</li> <li>• Probability = All</li> <li>• Opportunity Owner = [Name of Sales Rep]</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Owner</li> <li>• Account Name</li> <li>• Opportunity Name</li> <li>• Total Contract Value (sum this field)</li> <li>• Close Date</li> <li>• Group By: Stage</li> </ul>

<b>Report Name</b>	<b>Sales Activities Last Week</b>
<b>Object Name</b>	Activities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Activities</li> <li>• Activity Status = Complete</li> <li>• Probability = Tasks and Events</li> <li>• Assigned = [User]</li> </ul>
<b>Date Field</b>	Date
<b>Range</b>	Last Week
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Group By: Assigned</li> <li>• Company / Account</li> <li>• Contact</li> <li>• Lead</li> <li>• Opportunity</li> </ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

Total Closed This Month	
Component Type	Line Chart
Parameters	<ul style="list-style-type: none"><li>• Y-Axis: Sum of Amount</li><li>• X-Axis: Close Month</li><li>• Cumulative: Checked</li><li>• Show Axis Label: Checked</li><li>• Show Values: Checked</li></ul>

Bottom Of Funnel	
Component Type	Gauge Chart
Parameters	<ul style="list-style-type: none"><li>• Minimum: [Enter Value]</li><li>• Middle: [Enter Value]</li><li>• Maximum: [Enter Value]</li><li>• Show %: Checked</li><li>• Show Total: Checked</li></ul>

Sales Activities Last Week	
Component Type	Table
Parameters	<ul style="list-style-type: none"><li>• Display Units: Whole Units</li><li>• Drill Down To: Source Reports</li><li>• Column 1: Account Owner</li><li>• Column 2: Count</li><li>• Show Total: Checked</li><li>• Show Chatter Photos: Checked</li></ul>

# Pipeline Planning

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Plan the right activities so your team can focus on what's most important.



# 4 Monday Morning Dashboard

Gain visibility into the sales team's pipeline.

The Monday Morning Dashboard displays results from the previous week and current month, giving everyone on the sales team a peek into performance, progress, and the state of the pipeline. By understanding what happened, sales reps can plan the right activities to keep the pipeline full and flowing. You'll create the following reports: *Monthly Sales By Individual*, *Sales Activities to Opportunities Last Week*, and *Bottom Of Funnel*.

## STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Monthly Sales By Individual</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Closed / Won</li><li>• Probability = All</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	This Month
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Group By: Opportunity Owner</li><li>• Account Name</li><li>• Total Contract Value (sum this field)</li><li>• Age (average)</li></ul>

<b>Report Name</b>	<b>Sales Activities to Opportunities Last Week</b>
<b>Object Name</b>	Activities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Activities</li> <li>• Activity Status = Completed</li> <li>• Probability = Tasks and Events</li> </ul>
<b>Date Field</b>	Date
<b>Range</b>	Last Week
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Group By: Assigned</li> <li>• Company / Account</li> <li>• Contact</li> <li>• Opportunity</li> </ul>

<b>Report Name</b>	<b>Bottom Of Funnel</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Open</li> <li>• Probability = All</li> <li>• Stage = Proposal and Negotiation</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Owner</li> <li>• Account Name</li> <li>• Opportunity Name</li> <li>• Total Contract Value (sum this field)</li> <li>• Close Date</li> <li>• Group By: Stage</li> </ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

### Monthly Sales By Individual

<b>Component Type</b>	Horizontal Bar Chart
<b>Parameters</b>	<ul style="list-style-type: none"><li>• X-Axis: Opportunity Owner</li><li>• Y-Axis: Sum of Amount</li></ul>

### Sales Activities to Opportunities Last Week

<b>Component Type</b>	Table
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Display Units: Whole Units</li><li>• Drill Down To: Source Reports</li><li>• Column 1: Account Owner</li><li>• Column 2: Count</li><li>• Show Total: Checked</li><li>• Show Chatter Photos: Checked</li></ul>

### Bottom Of Funnel

<b>Component Type</b>	Gauge
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Minimum: [Enter Value]</li><li>• Middle: [Enter Value]</li><li>• Maximum: [Enter Value]</li><li>• Show %: Checked</li><li>• Show Total: Checked</li></ul>

# 5 Daily Pipeline Dashboard

Allow sales reps to understand their key activities and priorities.

The Daily Pipeline Dashboard reveals a sales rep's key activities and priorities in the pipeline, enabling them to take action on what's most important. You'll create the following reports: *Total Closed This Month*, *Activities Completed This Week*, and *Neglected Opportunities*.

## STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Total Closed This Month</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Closed / Won</li><li>• Probability = All</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	This Month
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Group By: Close Month (make sure you group by Calendar Day in Month)</li><li>• Opportunity Name</li><li>• Amount</li><li>• Account Name</li></ul>

<b>Report Name</b>	<b>Activities Completed This Week</b>
<b>Object Name</b>	Activities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Activities</li> <li>• Show: Completed</li> <li>• Show: Task and Events</li> </ul>
<b>Date Field</b>	Date
<b>Range</b>	This Week
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Subject</li> <li>• Priority</li> <li>• Status</li> <li>• Task</li> <li>• Company / Account</li> <li>• Group By: Assigned</li> </ul>

<b>Report Name</b>	<b>Neglected Opportunities</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Open</li> <li>• Probability = All</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Group By: Opportunity Owner</li> <li>• Opportunity Name</li> <li>• Close Date</li> <li>• Amount</li> <li>• Account Name</li> </ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

Total Closed This Month	
Component Type	Gauge Chart
Parameters	<ul style="list-style-type: none"><li>• Measure: Sum of Amount</li><li>• Show Range: Checked</li><li>• Set your segment ranges</li></ul>

Activities Completed This Week	
Component Type	Donut Chart
Parameters	<ul style="list-style-type: none"><li>• Value: Record Count</li><li>• Sliced By: Assigned</li><li>• Label Groups: No Labels</li></ul>

Neglected Opportunities	
Component Type	Vertical Bar Chart
Parameters	<ul style="list-style-type: none"><li>• X-Axis: Opportunity Owner</li><li>• Y-Axis: Record Count</li></ul>

# Pipeline Cleaning

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Keep your data healthy  
by holding sales reps  
accountable.

# 6 Data Diagnostics Dashboard

Reveal missing data from accounts, leads, and opportunities.

The Data Diagnostics Dashboard reveals which fields are left blank and who is responsible for completing them. It not only holds sales reps accountable for their data, but enforces a hard reality: "If it's not in Salesforce, it doesn't exist." You'll create the following reports: *Opportunities Past Due*, *Opportunities Without Open Activities*, and *Opportunities By Stage Age*.

## STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Opportunities Past Due</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Open</li><li>• Probability = All</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Group By: Opportunity Owner</li><li>• Opportunity Name</li><li>• Amount</li><li>• Close Date</li><li>• Stage</li><li>• Age</li></ul>



<b>Report Name</b>	<b>Opportunities Without Open Activities</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Open</li> <li>• Probability = All</li> <li>• Add Cross Filter: Opportunities without Activities</li> </ul>
<b>Date Field</b>	Created Date
<b>Range</b>	All Time
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Group By: Opportunity Owner</li> <li>• Opportunity Name</li> <li>• Amount</li> <li>• Close Date</li> <li>• Stage</li> </ul>

<b>Report Name</b>	<b>Opportunities By Stage Age</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Any</li> <li>• Probability = All</li> <li>• Stage Duration &gt; 90</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current CY or Current FY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Opportunity Owner</li> <li>• Account Name</li> <li>• Opportunity Name</li> <li>• Stage Duration</li> <li>• Amount</li> <li>• Close Date</li> <li>• Group By: Stage</li> </ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

### Opportunities Past Due

<b>Component Type</b>	Horizontal Bar Chart
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Y-Axis: Opportunity Owner</li><li>• X-Axis: Record Count</li><li>• Show Values: Checked</li></ul>

### Opportunities Without Open Activities

<b>Component Type</b>	Horizontal Bar Chart
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Y-Axis: Opportunity Owner</li><li>• X-Axis: Record Count</li><li>• Show Values: Checked</li></ul>

### Opportunities By Stage Age

<b>Component Type</b>	Funnel Chart
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Value: Record Count</li><li>• Stage: Show Values</li></ul>

# 7 Clean Your Room Dashboard

Keep sales rep accountable for sales activities.

The Clean Your Room Dashboard provides insights into the quality and reliability of your sales pipeline. It holds sales reps accountable for keeping all of their data as up to date and accurate as possible in Salesforce. You'll create the following reports: *Push Counts - Too Many By Rep*, *Close This Month - No Activity Last 7 Days*, and *Stale Opportunities*.

## STEP 1: Build the Reports

(refer to page 4 for report creation steps)

<b>Report Name</b>	<b>Push Counts - Too Many By Rep</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"><li>• All Opportunities</li><li>• Opportunity Status = Any</li><li>• Probability = All</li><li>• Push Count &gt; 3</li></ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current and Next CY
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"><li>• Opportunity Owner</li><li>• Account Name</li><li>• Opportunity Name</li><li>• Amount</li><li>• Close Date</li><li>• Push Count</li></ul>

<b>Report Name</b>	<b>Close This Month - No Activity Last 7 Days</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Any</li> <li>• Probability = All</li> <li>• Last Activity &lt; 7 Days</li> <li>• Last Activity = ""</li> <li>• Filter Logic: 1 or 2</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	This Month
<b>Table Type</b>	Summary
<b>Columns</b>	<ul style="list-style-type: none"> <li>• Account Name</li> <li>• Opportunity Name</li> <li>• Amount (sum this field)</li> <li>• Close Date</li> <li>• Next Step</li> <li>• Group By: Opportunity Owner</li> </ul>

<b>Report Name</b>	<b>Stale Opportunities</b>
<b>Object Name</b>	Opportunities
<b>Filters</b>	<ul style="list-style-type: none"> <li>• All Opportunities</li> <li>• Opportunity Status = Any</li> <li>• Probability = All</li> <li>• Age &gt; 90 Days</li> </ul>
<b>Date Field</b>	Close Date
<b>Range</b>	Current and Next CY
<b>Table Type</b>	Summary

<b>Report Name</b>	<b>Stale Opportunities</b>
<b>Columns</b>	<ul style="list-style-type: none"><li>• Account Name</li><li>• Opportunity Name</li><li>• Amount (sum this field)</li><li>• Close Date</li><li>• Next Step</li><li>• Group By: Opportunity Owner</li></ul>

## STEP 2: Build the Dashboard

(refer to page 5 for dashboard creation steps)

<b>Push Counts - Too Many By Rep</b>	
<b>Component Type</b>	Legacy Table
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Columns: Opportunity Owner and Record Count</li><li>• Segment Ranges: 1 and 5</li><li>• Sort Rows By: Value Descending</li><li>• Title: Stuck and Stale</li><li>• Footer: Deals Pushed More Than 3x</li></ul>

  

<b>Close This Month - No Activity Last 7 Days</b>	
<b>Component Type</b>	Legacy Table
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Columns: Opportunity Owner and Record Count</li><li>• Segment Ranges: 3 and 5</li><li>• Sort Rows By: Value Descending</li><li>• Title: Reality Check</li><li>• Footer: Close This Month Without Activity in Last 7 Days</li></ul>

  

<b>Stale Opportunities</b>	
<b>Component Type</b>	Donut Chart
<b>Parameters</b>	<ul style="list-style-type: none"><li>• Value: Record Count</li><li>• Sliced By: Opportunity Owner</li><li>• Labeled Groups: Values</li></ul>

# Thanks for reading!

We hope this whitepaper has provided guidance on how to manage and grow a healthy sales pipeline by building effective dashboards in Salesforce. We'd love to hear your thoughts and feedback about how you've used or modified these dashboards to accommodate your sale's team needs and goals. Give us a shout on Twitter ([@galvintech](#)) or shoot us an email us at [inquiries@galvintech.com](mailto:inquiries@galvintech.com).

## About Galvin Technologies

We work with companies by delivering Salesforce implementations. Based out of Indianapolis, IN, Galvin provides professional Salesforce Consulting services to companies across the Midwest. We specialize in Salesforce consulting and administration services, as well as Pardot lead cultivation and marketing. Salesforce products we specialize in are Sales Cloud, Service Cloud, Salesforce Wave (Analytics), Pardot, App Cloud and more. Visit us at [galvintech.com](http://galvintech.com) to learn more about how we can help streamline your business with Salesforce.