

SFDC Sales Dashboard configuration

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| Full report view | |
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| Report: Accounts with no activities for current month | |
| Columns: | |
| Fillers: | |
| Full report view | |
| Dusinet. Accounts with no uclivities jor current month | |
| Dashboara Filtering | |



Overview

All dashboards in SFDC are created by first building a report and then adding the report to SFDC Dashboards. They are inserted as dashboard tile, "dashlet", to the SFDC dashboards.

The dashboard screenshot below shows 7 dashlets, that are composed of 7 different SFDC reports. Each tile has a different visualization suce as metric component, table, bar graph, stacked column, funnel, donut chart, etc.) that best represents the KPIs or key data points to drive action.

The next few pages show the details on how to create the report and dashboards but clearly defined steps in SFDC report builder and dashboard setup. The report set up focuses on showing the report types, filters and columns to create the report and chart. The dashlet set up illustrates how to add the newly created report to the SFDC dashboard.







Assumptions

- Customer has installed the 6sense SFDC APP and has synched 6sense scores to the SFDC Account, Lead and Contact objects
- The 6sense Account, Contact and Lead scoring field names in this document have a different naming convention than the fields in your SFDC instance. Please adjust and using the matching field names from your SFDC instance
- The SFDC report configurations assume "All Accounts", "All Leads", "All Contacts" as the default to allow the admin to build and see all records. Please set up customized views by BDR, BDR Manager by selecting "My Own Accounts, Leads, Contacts" for the individual, or "My Team Accounts, Leads, or Contacts" depending on the report type
- As a best practice, when naming the reports or dashboards, add a prefix such as "Sales Manager" when the report is filtered for "My team's accounts, leads, contacts", "My Sales" for "My leads, accounts, contacts" or "Sales All" for "All accounts, leads or contacts".
- Use the correct reports are selected based on BDR, BDR Manager or BDR ALL reports when creating the Dashboards,
- This configuration guide assumes Sales ALL view but allows for a Sales filter at the dashboard level.



Report: In Market Accounts

1) In salesforce lightening view click on the reports tab, click on new report.

| - | All 🔻 Q. Search Salesforce | 🖈 🖬 ? 🌣 🖡 🐻 |
|--|--|---|
| PSA Home Contacts V Accounts V Regions V | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix Reports 🗸 More 🔻 🔘 |
| Reports | | |
| 5 items | Q Search recent reports | New Report New Report (Salesforce Classic) New Folder 2 + |

- 2) Select the account object from the list.
- 3) Add 6s Account Buying Stage to the Group Rows

Columns:

- 6s Account Buying Stage
- Account Name
- 6s Account Intent Score
- 6s Account Profile Fit
- 6s Company Industry
- 6s Company LinkedIn Url
- 6s Company Revenue Range

Filters:

- All accounts
- Created Date(current and previous month)
- 6s Account Buying Stage (equals 'Awareness', 'Consideration', 'Decision', 'Purchase')







| RE Sa | agar Accounts In | Market Report | Accounts | | | Got Feedback | k? うご Add Chart | Save & Run Save | Close Run | | | | |
|----------|--------------------|---------------|-----------------------------|--|---------------------------|--------------------------|-------------------------------------|---------------------------|--------------------------|--|--|--|--|
| > | ≡ Outline | 🔻 Filters 2 | Previewing a limited number | r of records. Run the report to see everything. Update Preview Automatically 🔨 | | | | | | | | | |
| ields | 6 | * | 6s Account Buying Stage 🕇 💌 | Account Name | 6s Account Intent Score 💌 | 6s Account Profile Fit 💌 | 6s Company Industry | 6s Company LinkedIn URL 💌 | 6s Company Revenue Range | | | | |
| LE. | GROUP ROWS | | Awareness (1) | DotDigital | 49 | Strong | Business Services | | \$25M - \$50M | | | | |
| | Add group | Q | Subtotal | | 49 | | | | | | | | |
| | 6s Account Buying | Stano X | Consideration (4) | Dell Tech | 59 | Strong | Software and Technology | | \$5B+ | | | | |
| | os Account buying | Stuge A | | Walter Surface Technologies | 56 | Strong | Electrical/Electronic Manufacturing | | \$25M - \$50M | | | | |
| | GROUP COLUMN | 5 | | Sprout | 66 | Moderate | Business Services | | \$25M - \$50M | | | | |
| | Add group | Q | | Unknown | 69 | Moderate | Healthcare and Medical | | \$50M - \$100M | | | | |
| | | | Subtotal | | 250 | | | | | | | | |
| | | | Decision (12) | Snappy | 80 | Weak | Consumer Goods and Services | - | \$5M - \$10M | | | | |
| | Columns | • | | Clear Value BV | 83 | Moderate | Business Services | | \$1 - \$1M | | | | |
| | Add column | Q | | The Click Exchange | 78 | Weak | | • | • | | | | |
| | Account Name | × | | LUCID Citra Komunika | 71 | Weak | | | | | | | |
| | # 6s Account Inter | nt Score X | | mailop | 75 | Weak | Business Services | • | \$5B+ | | | | |
| | 6s Account Profile | Fit × | | Thompson Hine | 75 | Moderate | Business Services | | \$100M - \$250M | | | | |
| | 6s Company Indus | try × | | RapidDeploy | 75 | Strong | Software and Technology | | \$10M - \$25M | | | | |
| | 6s Company Linked | dIn URL × | | Prospect-Experience | 71 | Weak | | • | • | | | | |
| | 6s Company Reven | ue Range X | | Shift Technology | 71 | Moderate | Software and Technology | | \$1M - \$5M | | | | |
| | | | | Art of Problem Solving | 75 | Weak | Retail and Distribution | • | \$1-\$1M | | | | |
| | | | | Prudent American Technologies Inc | 71 | Moderate | Electrical/Electronic Manufacturing | | \$1M - \$5M | | | | |
| | | | | Gubagoo | 84 | Strong | Software and Technology | • | \$1M - \$5M | | | | |
| | | | Subtotal | | 909 | | | | | | | | |
| | | | Purchase (3) | Siemens Healthineers | 86 | Strong | Electrical/Electronic Manufacturing | | \$5B+ | | | | |
| | | | | | | | | | | | | | |

4) Add the chart in order to see the analytics. Save report as 'In Market Accounts' and run the report.

| Report: Accounts Sagar Accounts In | n Market Report | | | | S-411-4777-011-10-S | 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 | Q C Y C Edit V |
|---|------------------|---------------------------|--------------------------|-------------------------|---------------------------|---------------------------------------|--|
| Total Records Total 6s Account 844 47,872 | Intent Score | | | | | | |
| | | | | | | | ¢ |
| | | | Sum of 6s Account Intent | Score: 48K | | | Display As Ber Column Stacked Bar Line Donut Furnet Chart Title |
| 6s Account Buying Stage 🕇 💌 | Account Name | 6s Account Intent Score 💌 | 6s Account Profile Fit 💌 | 6s Company Industry | 6s Company LinkedIn URL 💌 | 6s Company Re | Value |
| Awareness (301) | DotDigital | 49 | Strong | Business Services | , | \$25M - \$50M | Sum of 6s Account Intent Score |
| | HAVI | 48 | Strong | Business Services | 3 | \$5B+ | 6s Account Buying Stage |
| | Yellow Pages Inc | 46 | Strong | Business Services | - | \$500M - \$1B | |
| | Buildertrend | 47 | Strong | Software and Technology | • | - | Show Percentages |
| _ | CPI Security | 46 | Strong | Business Services | • | \$50M - \$100M | Combine Small Groups into "Others" |
| Row Counts 📿 Detail Rows I | Subtotals Grand | i Total 🔽 🔿 | | | | | |



5) Update the annotations for X and Y axis



6) Once the report is ready, we will create a new dashboard.



Dashlet: In Market Accounts

- This dashlet depicts the number of accounts in the market across all the buying stages.
- 1) Search for dashboard in the SFDC App tile icon



2) Create a new dashboard and name it

| PSA P | Home | Contacts 🗸 | Accounts 🗸 | Regions 🗸 | Practices \lor | Groups 🗸 | Projects 🗸 | Timecards 🗸 | Expense Reports 🗸 | Billing Event Generation | Skills Matrix | Dashboards 🗸 | More 🔻 | 0 |
|---------------------------------|------|------------|------------|---------------|------------------|----------|------------|----------------------------|---------------------|--------------------------|---------------|---------------|------------|------|
| Dashboards Recent 4 items | | | 788-71(-> | /////>:\\\\÷1 | | く、ノ出いフ | | (; / / <u>`</u> \\\\\\\\// | 1997 - JUNE-JI (- Z | Q. Search recent dashboa | rds | New Dashboard | New Folder | \$ · |

| New Dashboard | |
|----------------------------------|--|
| | KA Home Contacts v Accounts v Regions v Practices v Groups v Projects v Timecants v Expense Reports v Billing ExertsGeneration Stills Matrix Databoards v More * |
| *Name Sagar sales dashboard | Segurise dehtered / + Comparent + Rev. () () () Sea v Dan |
| Description | |
| | |
| Folder | |
| Private Dashboards Select Folder | |
| Cancel | |

3) After creating a dashboard click on add component in order to add the report as a tile(dashlet) in the dashboard. Adjust the color accordingly.



| Sum of 6s Account Intent Score: 48x | 6s Account Buying Stage Awareness Consideration Decision Purchase |
|---|---|
| ola 6k View Report (Sagar Accounts In Market Repo | ort) |
| | Gr |



Report: In Market Account Contact

1) In salesforce lightening view click on the reports tab, click on new report.

| ٠ | | | | | All 🔻 🛛 | ्र Search Sal | esforce | | |] | | *- | ∎ ? ⊅ | : <u> </u> | 6 |
|-------------------|------|------------|------------|-----------|------------------------|---------------|------------|-------------|---------------------|--------------------------|---------------|--------------------|----------|------------|----|
| PSA | Home | Contacts 🗸 | Accounts 🗸 | Regions 🗸 | Practices \checkmark | Groups 🗸 | Projects 🗸 | Timecards 🗸 | Expense Reports 🗸 | Billing Event Generation | Skills Matri | Reports 🗸 | More 🔻 | SAMAN THE | 0 |
| Reports Recent | | | | | 1 | 2//// | | Q Sea | arch recent reports | New Report | New Report (S | alesforce Classic) | New Fold | er \$ | ** |

- 2) Select the Contacts & Account object from the list.
- 3) Add 6s Account Buying Stage to the Group Rows

Columns:

- Account Name
- Billing Country
- Industry
- Website
- # of validated Contacts

Filters:

- All accounts
- Created Date(current and previous month)
- 6s Account Buying Stage (not equal to 'Target')
- Do Not Call (equals False)



| R | EPORT ▼ nMarket Accounts v | vith Contacts | F I | REPORT ▼ nMarket Accoun | ts with Contacts |
|-------|-------------------------------|---------------|--------|---------------------------------------|------------------------------|
| < < | ≡ Outline | 🛛 Filters | | | |
| Field | Groups | ÷ | ls < | ≡ Outline | T Filters 3 |
| | GROUP ROWS | | elo | | |
| | Add group | Q | ίΞ | Filters | ▼ |
| | 6s Account Buying Sta | age × | | Add filter | Q |
| | GROUP COLUMNS | | | Show Me | |
| | Add group | Q | | All accounts | |
| | | | | Created Date | |
| | Columns | | | Current and Pre (May 1, 2020 | vious Month Jun 30, 2020) |
| | Add column | Q | | | |
| | Account Name | × | | 6s Account Buyir | ng Stage × |
| | Billing Country | × | | | 0 |
| | Industry | × | | Do Not Call | × |
| | Website | × | | equals False | |
| | # # of Validated Con | tacts × | | | |

| - Outline | Filters | Previewing a limited number | of records. Run the re | port to see everything. | | | | Update Preview Automatically |
|---|------------------------------|-----------------------------|------------------------|-------------------------|-----------------------------|---|---------------------------|------------------------------|
| Filters | V | | | | | | | |
| Add filter | Q | | | | Contactr | Available for Outroach | | |
| Show Me | | | | | Record Cour | nt | | 6s Account Buying Si |
| All accounts | | | | | | | | Consideration |
| Created Date Current and Pre (May 1, 2020 - J | vious Month Jun 30, 2020) | | | | | den er en | | Decisior Purchase |
| 6s Account Buyin not equal to Tar | g Stage × | | | | 11 (55%) 20 | 6 (30%) | | |
| Do Not Call equals False | × | | | | | | | |
| | | | | | | | | |
| | | 6s Account Buying Stage 🕇 💌 | Account Name 💌 | Billing Country 💌 | Industry 💌 | Website | # of Validated Contacts 💌 | |
| | | Consideration (2) | Button | US | Software and Technology | https://www.usebutton.com/ | 0 | |
| | | | Very Good Security | United States | Computer Software | http://verygoodsecurity.com | 0 | |
| | | Subtotal | | | | | | |
| | | Decision (6) | Achievers | Canada | Software and Technology | http://achievers.com | 0 | |
| | | | bell | Canada | Telecommunications Services | http://bell.ca | 0 | |
| | | | bell | Canada | Telecommunications Services | http://bell.ca | 0 | |
| | | | bell | Canada | Telecommunications Services | http://bell.ca | 0 | |
| | | | bell | Canada | Telecommunications Services | http://bell.ca | 0 | |
| | | | | | | | | |

4) Save the report as 'In Market Account Contact'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.



| Bar | Column | Stacked Bar | Stacked Column | | | | | | | | |
|---------------------------------|---------------------------------|-----------------|-------------------|--|--|--|--|--|--|--|--|
| Line | Line Donut Funnel Scatter Plot | | | | | | | | | | |
| Chart Attributes Chart Title | | | | | | | | | | | |
| Contacts A Value | Contacts Available for Outreach | | | | | | | | | | |
| Record Co | unt | | • | | | | | | | | |
| Sliced By | | | | | | | | | | | |
| 6s Account | t Buying Sta | ige | • | | | | | | | | |
| Show Valu | ues | | | | | | | | | | |
| Show Per | centages | | | | | | | | | | |
| Combine | Small Group | os into "Others | 5" | | | | | | | | |
| Show Tota | al | | | | | | | | | | |
| Legend Position | | | | | | | | | | | |
| Right | | | • | | | | | | | | |



Dashlet: In Market Account Contact

- This dashlet depicts the number of contacts associated with accounts in the market across all the buying stages filtered by account owner
- 1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.
 - 1) Go to the previously created sales dashboard

| | All 👻 🔍 Search Salesforce | | x 🖬 🤉 🕸 🛉 🔘 |
|---|--|---|-----------------------|
| PSA Home Contacts V Accounts V Regions V | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix | Dashboards 🗸 More 🔻 🕼 |
| Dashboard Sagar sales dashboard As of Jun 11, 2020 12:15 PM-Viewing as Sagar Shah | AT NORMA INTELE INVASIANT PETERSAANAAT NORMA INTELE INVASIANT P | 277-5411347 XXXIII 70017 - 773X5 + 6 | ollow Refresh Edit V |
| Sagar Accounts In Market Report Sum of 65 Account Intent Score 48k 20k 9.6 6 View Report (Sagar Accounts In Market Report) | Stage Stage 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'In-Market Accounts with Contacts' report

| PS | A Home Contacts 🗸 | Accounts v Regions v Practices v Groups v Projects v Timecards v Expense R | eports 🗸 Billing Event Generation Skills Matrix Dashboards 🗸 More 🔻 |
|-------------|-----------------------------------|---|---|
| Sagar sales | s dashboard | | + Component + Filter 5 8 Save 🔻 |
| Sagar Ac | counts in Market Report | / × | × |
| | | Select Report | |
| | Reports | Q. Search Reports and Folders | Reports and Folders 🔻 |
| | Recent Created by Me | Sagar In Market Account with Contacts Sagar Shah - Jun 11, 2020 12:25 PM - Private Reports | |
| | Private Reports Public Reports | InMarket Accounts with Contacts Peter Shum - May 20, 2020 3:52 AM - CLC - Adoption | |
| View Rept | All Reports | Sagar Accounts In Market Report Sagar Shah - Jun 11, 2020 9:54 AM - Private Reports | |
| | Folders Created by Me | In Market Accounts Peter Shum - May 20, 2020 3:41 AM - CLC - Adoption | |
| | Shared with Me | Missing TimeCards Consultants Peter Shum - Jun 8, 2020 4:05 PM - 1.E) Customer Success Reports | |
| | Airoiddis | Consultants' Project Staffing Details Peter Shum - Jun 5, 2020 8:32 AM - 1.E) Customer Success Reports | |
| | | PSA Timecard Hours By Person By Week Peter Shum - Jun 4, 2020 1:24 PM - PSA Smart Start Reports | |
| | | HUBSPOT CUSTOMERS | |
| | | | Cancel Select |



3) Add this new report to the dashboard

| Sagar sales dashboard | | | + Component | + Filter | 5 년 😫 Save 🔻 Done | 8 |
|--|--|---|--|-----------------|----------------------|---|
| Sagar Accounts In Market Report | | Add Component | Î | | | |
| Sum dis Account Intent Scare Ads. Co. | Report Sagar In Market Account with Contacts Use chart actings from report Diplay As Diplay As Sum of a of Validated Contacts Value Sum of a of Validated Contacts Conta | Preview Sagar In Market Account with Contacts Sum of if of Waldated Contact | un fluying Stape Awarense B Decision C Purchase D | | | |
| | | c | Cancel Add | | | |
| BA Home Contacts V Accounts V Re | egions 🗸 Practices 🗸 Groups 🗸 | Projects \checkmark Timecards \checkmark Expense Reports \checkmark | Billing Event Generation | Skills Matrix D | ashboards 🗸 More 🔻 🌘 | 0 |
| Sagar sales dashboard 🥒 | | | + Component | + Filter | 5 C \$ Save ▼ Done | е |
| Sagar Accounts in Market Report | X X Sagar In Market Ac | count with Contacts | | | | |
| Sum of 6s Account Intent Score - 48k Co 20k 0 k 0 k 0 k 0 k 0 k 0 k 0 k 0 | Sun of a nsideration Decision Purchase 711 | d'Valdated Contacts 177 177 2.4K 80 | | | | |
| View Report (Sagar Accounts In Market Report) | View Report (Sagar In Ma | ket Account with Contacts) | | | | |
| | | | | | | |



Report: In Market Account No Opportunities

1) In salesforce lightening view click on the reports tab, click on new report.

| | All 🔻 Q. Search Salesforce | ** 🖬 ? 🌣 🖡 🐻 |
|--|--|---|
| $\overset{\bullet\bullet\bullet\bullet}{\overset{\bullet\bullet\bullet\bullet}{\overset{\bullet\bullet\bullet\bullet}{\overset{\bullet\bullet\bullet}{\overset{\bullet\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}{\overset{\bullet}}{\overset{\bullet}{\overset{\bullet}}}}}}}}$ | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix Reports 🗸 More 💌 🕕 |
| <u>1977 (7777)</u> 1977 - Martin Martin, 1977 - Martin Martin, 1977 - Martin Martin, 1977 - Martin Martin, 1977 - Martin Martin, 19 | NSWIC <i>IIIIC - JINSETI (771125</i> ,11577 NSWIC <i>IIIIC - JINSETI (7</i> | |
| Reports | | |
| Recent | Q Search recent reports | New Report New Report (Salesforce Classic) New Folder 👳 - |
| 5 items | | |

- 2) Select the Account with Opportunities object from the list.
- 3) Add 6s Account Buying Stage to the Group Rows

Columns:

- Account Name
- 6s Account Intent Score
- 6s Account Profile Fit
- Industry

Filters:

- All accounts
- Current FQ
- 6s Account Buying Stage (not equal to 'Target')
- Opportunityid (equals "")





| RI Ir | PORT V Market Accoun | ts No Opportun | ities 🖌 Accounts with Opport | unities | | | Got Feedba | ick? 🔿 👌 😮 Save 🔻 Close Run |
|----------|--|----------------|------------------------------|---------------------------------------|---------------------------|--------------------------|-------------------------|--|
| > | ≡ Outline | ▼ Filters ③ | Previewing a limited number | of records. Run the report to see eve | rything. | | | Update Preview Automatically 💙 🔍 |
| | Filters | | | | | | | zột |
| | Add filter | Q | | | Awaran | ore Consideration No O | notunition | |
| | Show Me All accounts | | | | Rec | ord Count | pportunities | 6s Account Buying Stage |
| | Created Date Current FQ (May 31, 2020) | 1, 2020 - Jul | | | 129 | 2 (10%) | | Awareness Consideration Decision |
| | 6s Account Buying not equal to Targ | g Stage × | | | 9 (45%) | 20 (25%) | | Purchase 🥚 |
| | Opportunity ID equals "" | × | | | | | | |
| | | | 6s Account Buying Stage 🕇 💌 | Account Name | 6s Account Intent Score 💌 | 6s Account Profile Fit 💌 | Industry | |
| | | | - (2) | Unknown | - | | - | |
| | | | | Unknown | | | | |
| | | | Subtotal | | | | | |
| | | | Awareness (2) | Yellow Pages Inc | 46 | Strong | Software and Technology | |
| | | | | Buildertrend | 47 | Strong | Computer Software | |
| | | | Subtotal | | | | | |
| | | | Consideration (5) | Walter Surface Technologies | 56 | Strong | Business Services | |
| | | | | Sprout | 66 | Moderate | Business Services | |
| | | | | Unknown | 69 | Moderate | Healthcare and Medical | |
| | | | | 5 H.T. I | | ~ | | |
| | | | Row Counts 🔍 Detail Ro | ws 💙 Subtotals 🗹 G | rand Total 🔽 🔾 | | | Currency: USD |

4) Save the report as 'In Market Account No Opportunities'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.

| Bar | Column | Stacked Bar | Column | | | | | | |
|------------------|-----------------|----------------|--------------|--|--|--|--|--|--|
| | 0 | Ŧ | | | | | | | |
| Line | Donut | Funnel | Scatter Plot | | | | | | |
| Chart Attributes | | | | | | | | | |
| | | | | | | | | | |
| Awareness | s-Considerat | tion No Opp | ortunities | | | | | | |
| Value | | | | | | | | | |
| Record Co | unt | | • | | | | | | |
| Sliced By | | | | | | | | | |
| 6s Accoun | t Buying Sta | age | - | | | | | | |
| Show Val | ues | | | | | | | | |
| Show Per | rcentages | | | | | | | | |
| Combine | Small Group | os into "Other | 5" | | | | | | |
| Show Tot | al | | | | | | | | |
| Legend Posit | Legend Position | | | | | | | | |
| Right | | | • | | | | | | |



Dashlet: In Market Account No Opportunities

- This dashlet depicts the number of accounts in the market across all the buying stages filtered by account owner, that did not open the opportunities yet
 - 1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.
 - 1) Go to the previously created sales dashboard

| | All 🔻 🔍 Search Salesforce | | 🗶 🖬 🏅 🏠 👘 |
|---|--|--|------------------------|
| PSA Home Contacts V Accounts V Regions V P | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix | Dashboards 🗸 More 🔻 🕕 |
| Dashboard Sagar sales dashboard As of Jun 11, 2020 12:15 PM Viewing as Sagar Shah | | + R | ollow 🔊 Refresh Edit 🔻 |
| Sagar Accounts In Market Report | * ? O??? Z#292 O??? Z | | |
| Sum of 6s Account Intent Score: 48k |))(7.9729/0)(6)(2)(7.9729) | | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'In-Market Accounts No Opportunity' report

| Sagar sales | A Home Contacts ∨ Acco dashboard | Ints Regions Practices Groups Projects Timecards Expense Reports Billing Event Generation Skil + Component + Component | s Matrix Dashboards ∨ More ▼ + Filter 5 0 \$ Save ▼ |
|-----------------------------------|-------------------------------------|---|--|
| Sagar Acc | ounts In Market Report | Sagar In Market Account with Contacts | × |
| | | Select Report | |
| | Reports | Q. Search Reports and Folders | Reports and Folders 🔻 |
| | Recent Created by Me | Sagar In Market Accounts No Opportunity Sagar Shah - Jun 14, 2020 2:56 PM - Private Reports | |
| Private Reports Public Reports | | In Market Accounts No Opportunities Peter Shum - May 20, 2020 4:15 AM - CLC - Adoption | |
| View Repo | All Reports | Accounts No Activity This Month Peter Shum - May 20, 2020 8:53 AM - CLC - Adoption | |
| | Folders Created by Me | Activities By BOFU BY REP Peter Shum - May 20, 2020 4:18 AM - CLC - Adoption | |
| | Shared with Me | In Market Accounts No Activity This Quar Peter Shum - May 20, 2020 4:04 AM - CLC - Adoption | |
| | | Activities By Stage This and Prev Quarte Peter Shum - May 20, 2020 3:51 AM - CLC - Adoption | |
| | | InMarket Accounts with Contacts Peter Shum - May 20, 2020 3:52 AM - CLC - Adoption | |
| | | In Market Accounts | |
| | | | Cancel Select |



3) Add this new report to the dashboard





Report: Activities by stage for this and previous quarter

1) In salesforce lightening view click on the reports tab, click on new report.

| | All 🔻 Q. Search Salesforce | 🗶 🖬 ? 🌣 🖨 🕲 |
|---|--|---|
| PSA Home Contacts \lor Accounts \lor Regions \lor | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix Reports 🗸 More 🔻 🕕 |
| Reports | ANNO <i>MUT - DUSETT (</i> | |
| Recent | Q Search recent reports | New Report New Report (Salesforce Classic) New Folder 🔯 - |
| 5 items | | |

- 2) Select the Activities with Accounts object from the list.
- 3) Add 6s Account Buying Stage and Type field to the Group Rows
- 4) Columns:
 - Account Name
 - Subject
 - 6s Account Profile Fit
 - 6s Account Intent Score
- 5) Filters:
 - Show Me(all activities)
 - Current and Previous FQ
 - 6s Account Buying Stage (not equal to 'Target')
 - Show (Open Activities)
 - Show(Tasks and Events)

| ≡ Outline ▼ | Filters 3 | ≡ Outline | Filters 3 | 🔗 Pre | viewing a limited number of records | s. Run the re |
|------------------------|------------------|---------------------------------------|--------------------------|-------|-------------------------------------|---------------|
| Groups | Ê | Filters | ▼ | | | |
| Add group | Q | Add filter | Q | | | |
| 6s Account Buying Stag | e × | | | ţ | 6 | |
| Туре | × | All activities | | d Cor | 3 | |
| IIII GROUP COLUMNS | | Date | | ç | | |
| Add group | Q | Current and Prev 2020 - Jul 31, 20 | vious FQ (Feb 1,)20) | Edit | Filter | × |
| Columns | • | Show Open Activities | | Show | v pen Activities | • |
| Add column | Q | Show | | | | |
| Subject | × | Tasks and Events | 5 | × | Open Activities | |
| Account Name | × | 6s Account Buying | g Stage | - | Completed Activities | |
| 6s Account Profile Fit | × | not equal to Tar | get | 6s . | Open & Completed Activities | |
| # 6s Account Intent Sc | ore × | | | | | (O) |



| Outline Tilters | 3 | Previewing a limited number | er of records. Run the re | port to see everythi | ing. | | | | | | Update Preview | Automatically |
|---|-----------------------|---|--|--|---------------------|--------------------|------------------|---|--|------------|---|---------------|
| oups | 亩 | | | | | | | | | | | |
| Add group | Q, | 6 tune | | | | | | | | | | |
| s Account Buying Stage | × | 20 3 | | | | | | | | | | |
| /pe | × | o Reco | | | | | | | | | | |
| GROUP COLUMNS | | | Call | ٺ | ö | ö | 1 | Call | | ö | ö | ö |
| Add group | Q | - A | J | | | | 6 | | | | | ٩ |
| | | | | | | 6s Ac | count Buying Sta | age > Type | | | | |
| | | | | | Type 🧧 On | line Meeting 🔳 Cal | ll 📒 Email 📒 | Onsite 📒 - 📒 Linked | IIn | | | |
| lumns | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Add column | Q | 6s Account Buying Stage 🕇 💌 | Туре 🕇 🔍 💌 | Subject | | | • | Account Name | 6s Account Profile Fit 💌 | 6s Accou | nt Intent Score 💌 | |
| Add column | Q, X | 6s Account Buying Stage ↑ | Type ↑ ▼ Online Meeting (2) | Subject Call | | | | Account Name Prevalent Inc. | 6s Account Profile Fit v | 6s Accour | nt Intent Score 💌 24 | |
| Add column ubject ccount Name | Q. × × | 6s Account Buying Stage ↑ v Awareness (2) | Type ↑ ▼ Online Meeting (2) | Subject Call Call | | | | Account Name Prevalent Inc. Kasasa | 6s Account Profile Fit V Strong Strong | 6s Accour | nt Intent Score 💌 24 22 | |
| Add column ubject ccount Name s Account Profile Fit | Q × × × | 6s Account Buying Stage ↑ ▼ Awareness (2) | Type ↑ Online Meeting (2) Subtotal | Subject Call Call | | | ¥ | Account Name Prevalent Inc. Kasasa | 6s Account Profile Fit V Strong Strong | 6s Accour | nt Intent Score 💌 24 22 46 | |
| Add column ubject ccount Name s Account Profile Fit 6s Account Intent Score | Q' × × × × | 6s Account Buying Stage 🕇 💌 Awareness (2) Subtotal | Type ↑ ▼ Online Meeting (2) Subtotal | Subject Call Call | | | V | Account Name Prevalent Inc. Kasasa | 6s Account Profile Fit V Strong Strong | 6s Accour | nt Intent Score 👻 24 22 46 46 | |
| Add column ubject ccount Name s Account Profile Fit 6s Account Intent Score | Q x x x x | 6s Account Buying Stage † 💌 Awareness (2) Subtotal Consideration (6) | Type ↑ ▼ Online Meeting (2) Subtotal | Subject Call Call Call | | | | Account Name Prevalent Inc. Kasasa Skilljar | 6s Account Profile Fit V Strong Strong Strong | 6s Accour | nt Intent Score 24 22 46 46 67 | |
| Add column ubject ccount Name s Account Profile Fit 6s Account Intent Score | Q X X X X | 6s Account Buying Stage ↑ Awareness (2) Subtotal Consideration (6) | Type † Type † Online Meeting (2) Subtotal Call (1) Subtotal | Subject Call Call Call | | | • | Account Name Prevalent Inc. Kasasa Skilljar | 6s Account Profile Fit v Strong Strong Strong | 6s Accour | nt Intent Score 24 22 46 46 67 67 67 | |
| Add column ubject ccount Name s Account Profile Fit 6s Account Intent Score | Q X X X X | 6s Account Buying Stage ↑ Awareness (2) Subtotal Consideration (6) | Type † Type † Online Meeting (2) Subtotal Call (1) Subtotal Email (1) | Subject Call Call Call Reach Back in Ear | ty April 2020 to en | 5080 | | Account Name Prevalent Inc. Kasasa Skilljar WhiteHat Security | 6s Account Profile Fit v Strong Strong Strong Strong | 6s Accourt | nt Intent Score 👻 24 22 46 46 67 67 67 | |
| Add column ubject ccount Name s Account Profile Fit 6s Account Intent Score | Q × × × × | 6s Account Buying Stage ↑ Awareness (2) Subtotal Consideration (6) | Type † • Online Meeting (2) Subtotal Call (1) Subtotal Email (1) Subtotal | Subject Call Call Call Call Reach Back in Ear | ty April 2020 to en | 2080 | V | Account Name Prevalent Inc. Kasasa Skilljar WhiteHat Security | 6s Account Profile Fit v | 6s Accourt | nt Intent Score 👻 24 22 46 46 67 67 61 61 | |
| Add column ubject ccount Name s Account Profile Fit 66 Account Intent Score | Q X X X X | 6s Account Buying Stage ↑ Awareness (2) Subtotal Consideration (6) | Type + Image: Control of the section | Subject Call Call Call Call Reach Back in Ear Discovery Call | ty April 2020 to en | zage | ¥ | Account Name Prevalent Inc. Kasasa Skilijar WhiteHat Security Kira Systems | 6s Account Profile Fit V Strong Strong Strong Weak | 6s Accour | nt Intent Score 👻 24 22 46 46 67 67 61 61 61 64 | |

6) Save report as 'Activities by stage for this and previous quarter'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.

| Juart Inte | | |
|----------------|-------------|----------|
| | | |
| | | |
| <-Axis | | |
| 6s Account B | uying Stage | • |
| Туре | • | × |
| -Axis | | |
| Record Coun | t | • |
| Chavy Deferre | | |
| Show Refere | ence Line | |
| Reference Line | Value | |
| 0 | | |
| + Measure | | |
| Show Value | ~ | |
| Show values | 5 | |
| egend Position | 1 | |
| Bottom | | • |
| | | |



Dashlet: Activities by stage for this and previous quarter

• This dashlet depicts the activities by stage for the accounts across buying stages

1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.

1) Go to the previously created sales dashboard

| | All 🔻 🔍 Search Salesforce | × · · · · · · · · · · · · · · · · · · · |
|---|--|--|
| PSA Home Contacts V Accounts V Regions V R | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor Billing E | Event Generation Skills Matrix Dashboards 🗸 More 🔻 🕚 |
| Dashboard Sagar sales dashboard As of Jun 11, 2020 12:15 PM Viewing as Sagar Shah | ANNO 11847 - ARASAR A AMASANG ENNING INTER-ANASAR AMASA | + Follow Refresh Edit V |
| Sagar Accounts In Market Report | | |
| Sum of 6s Account Intent Score: 48k 12k 20k 2.0k 2.0k 2.0k Vew Report (Sagar Accounts in Market Report) | | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'Activities by stage for this and previous quarter' report

| ::: P | SA Home Contacts 🗸 Accounts | \vee Regions \vee Practices \vee Groups \vee | Projects 🗸 Timecards 🗸 | Expense Reports 🗸 🗸 | Billing Event Generation | Skills Matrix | Dashboards | ✓ More | • |
|-----------|-----------------------------------|--|------------------------|---------------------|--------------------------|---------------|------------|----------------------------|-----------------|
| Sagar sal | es dashboard | | | | + Component | + Filter | ಿ | 🕸 Save | Done |
| Sagar A | ccounts In Market Report | InMarket Accounts w | vith Contacts | / × | Sagar In Market Acc | counts No Op | portunity | | × /> |
| | | | Select Report | | | | | | ng Stage - 🌑 |
| | Reports | Q Search Reports and Folders | | | | | Reports a | nd Folders 🔻 | ness ition |
| | Recent Created by Me | SagarActivitiesByStageThisPrevQuarter Sagar Shah - Jun 14, 2020 3:13 PM - Private Reports | | | | | | | hase ● |
| | Private Reports Public Reports | Activities By Stage This and Prev Quarte Peter Shum - May 20, 2020 3:51 AM - CLC - Adoption | | | | | | | |
| View Repo | All Reports | Sagar In Market Accounts No Opportunity Sagar Shah - Jun 14, 2020 2:56 PM - Private Reports | | | | | | | |
| | Folders Created by Me | In Market Accounts No Opportunities Peter Shum - May 20, 2020 4:15 AM - CLC - Adoption | | | | | | | |
| | Shared with Me | Accounts No Activity This Month Peter Shum - May 20, 2020 8:53 AM - CLC - Adoption | | | | | | | |
| | All Folders | Activities By BOFU BY REP Peter Shum - May 20, 2020 4:18 AM - CLC - Adoption | | | | | | | |
| | | In Market Accounts No Activity This Quar Peter Shum · May 20, 2020 4:04 AM · CLC - Adoption | | | | | | | |
| | | InMarket Accounts with Contacts | | | | | | | |
| | | | | | | | Cancel | Select | |
| | | | | | | | | | |



3) Add this new report to the dashboard





Report: In market accounts no activities this quarter

1) In salesforce lightening view click on the reports tab, click on new report.

| ٠ | All 🔻 🔍 Search Salesforce | ★ 🖬 ? 🌣 🖡 🐻 |
|--|--|---|
| Since PSA Home Contacts \checkmark Accounts \checkmark Regions \checkmark | Practices \checkmark Groups \checkmark Projects \checkmark Timecards \checkmark Expense Reports \checkmark | Billing Event Generation Skills Matrix Reports 🗸 More 🔻 🚳 |
| NETTER COMPANIES AND AND AND COMPANIES AND C | ARMICE TRUSTICE CONFERENCE ARMICE TRUSTICE | CHERNIELC ANNUMBLE THE CHERNEL HELC ANNUTHER . |
| Reports | | |
| Recent | Q. Search recent reports | New Report New Report (Salesforce Classic) New Folder 🚓 - |
| 5 items | | |
| 5 Kents | | |

- 2) Select the Accounts object from the list.
- 3) Add 6s Account Buying Stage field to the Group Rows

Columns:

- Account Name
- Sub-type
- CRM
- MAP
- BDR
- CSM
- 6s Account Intent Score
- 6s Account Profile Fit
- Last Activity

Filters:

- Show Me(all activities)
- Created date (ALL TIME)
- 6s Account Buying Stage (Contains 'Decision', 'Purchase')
- Last Activity (Less than this quarter)



| < < | ≡ Outline ▼ Filters | 2 | > | ≡ Outline | Filters 2 | Previewing a lin | nited number | of records. Run the repor |
|-------|----------------------------|---|--------|-----------------------------------|------------------|-------------------|---------------|---------------------------|
| Field | Groups | 啬 | -ields | Filters | | 6s Account Buying | Stage 🕇 💌 | Account Name |
| | | | - | | | Decision (13) | | SHIFT Communications |
| | Add group | Q | | Add filter | Q | | | |
| | 6s Account Buying Stage | × | | | | | | Synthio |
| | GROUP COLUMNS | | | Show Me All accounts | | Filter by Last Ac | tivitv | x |
| | Add group | Q | | | | | | |
| | | | | Created Date All Time | | Operator | | |
| | Columns | - | | 6s Account Buyir | ng Stage | less than | | • |
| | Add column | Q | | contains purcha | ase, decision × | | | |
| | Account Name | × | | | | Туре | Relative Dat | e Use calendar date |
| | Sub-type | × | | Last Activity less than THIS (| OUARTER × | Value 🔻 | THIS QU | ARTER |
| | CRM | × | | | | | Entor a relat | ine data like VEC |
| | MAP | × | | | | | | ST WEEK or NEXT |
| | BDR | × | | | | | 30 DAYS. Fo | r a list of supported |
| | CSM | × | | | | | values, see t | he Salesforce help. |
| | # 6s Account Intent Score | × | | | | | | |
| | 6s Account Profile Fit | × | | | | | Í | Cancel Apply |
| | Last Activity | × | | | | LOCKED | | Apply |

| \equiv Outline | Y Filters 2 | Previewing a limited number | of records. Run the report to see ev | erything. | | | | | | Update Pre | view Automatically 🗸 | |
|----------------------|---------------------------|-----------------------------|--------------------------------------|-----------|------------|-------------------|-----------------------|-------|-------------------|------------|-----------------------|------|
| Groups | â | | | | | | | | | | 1 | ¢ |
| Add group | Q | 0 | 1 2 | 3 4 | 5 | Record Count 6 | 7 | 8 | 9 | 10 | 11 1 | 12 |
| 6s Account Buying S | itage × | | | | | | | | | | | |
| GROUP COLUMNS | | BO Decision | | | | | | | | | | |
| Add group | Q | Buyin | | | | | | | | | | |
| | | Purchase | | | | | | | | | | |
| Columns | • | Ű | | | | | | | | | | |
| Add column | Q | | | | | | | | | | | |
| Account Name | × | 6s Account Buying Stage 🕇 💌 | Account Name | Sub-type | CRM 💌 | MAP | BDR | CSM 💌 | 6s Account Intent | Score 🕹 💌 | 6s Account Profile Fi | it 💌 |
| Sub-type | × | Decision (12) | Instapage | Prospect | • | Marketo | Julia Monet Rodriguez | • | | 84 | Strong | |
| CRM | × | | SHIFT Communications | Prospect | Salesforce | Marketo | Karsten Wethington | • | | 84 | Strong | |
| MAP | × | | Synthio | Prospect | • | Pardot | Karsten Wethington | • | | 81 | Strong | |
| BDR | × | | Scalyr | Prospect | - | · | Karsten Wethington | • | | 81 | Strong | |
| CSM | × | | TripActions | Prospect | • | • | Stella Woo | · | | 80 | Strong | |
| # 6s Account Intent | Score × | | Prontoforms | Prospect | | | Karsten Wethington | | | 78 | Strong | |
| 6s Account Profile F | it × | | NEC Display Solutions | Prospect | - | | Arianny Arias | - | | 73 | Strong | |
| Last Activity | × | | DialogTech | Prospect | • | | Karsten Wethington | • | | 72 | Strong | |
| | | | Silicon Valley Bank | Prospect | Salesforce | Marketo | Jack Hazelton | • | | 71 | Strong | |



4) Save the report as 'In market accounts no activities this quarter'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.

| Display As | Column | Stacked Bar | Stacked Column | | | | |
|-----------------------------|---------------------------------|-------------|-------------------|--|--|--|--|
| Line | Donut | Funnel | Scatter Plot | | | | |
| Chart Attrib Chart Title | Chart Attributes Chart Title | | | | | | |
| Y-Axis | t Buying Sta | 199 | | | | | |
| X-Axis | t buying Sta | ige | | | | | |
| Record Co | unt | | - | | | | |
| Show Ref | Show Reference Line Show Values | | | | | | |
| | Remov | e Chart | | | | | |



Dashlet: In market accounts no activities this quarter

• This dashlet depicts the accounts which are in market but have no activities associated with them

1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.

1) Go to the previously created sales dashboard

| - | All 👻 Q Search Salesforce | × 🖬 ? 🌣 투 😳 |
|---|--|--|
| PSA Home Contacts V Accounts V Regions V F | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix Dashboards 🗸 More 🔻 🖉 |
| Dashboard Sagar sales dashboard As of Jun 11, 2020 12:15 PM-Viewing as Sagar Shah | ANNAN JURIZ – JURIS II I. ZZZ BOLLET ANNAN JURIZ – JURIS II I. | + Follow Refresh Edit V |
| Sagar Accounts In Market Report Sum of 6s Account Intent Score 48k 20k 9.8 6 View Report (Bagar Accounts In Market Report) | · Personal Constant of the second secon | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'In market accounts no activities this quarter' report

| Sagar sales dashboard | / | | + Component + Filter | 508 | Save 🔻 |
|---------------------------------|--|-----|-------------------------------|-------------------|--------|
| Sagar Accounts In Market Report | InMarket Accounts with Contacts | / × | Sagar In Market Accounts No O | oportunity | × |
| | Select Report | | | | |
| Reports | Q Search Reports and Folders | | | Reports and Folde | ers 🔻 |
| Recent | | | | | |
| Created by Me | Sagar In Market Accounts No Activity Sagar Shah - Jun 14, 2020 3:24 PM - Private Reports | | | | |
| Private Reports | In Market Accounts No Activity This Quar | | | | |
| Public Reports | Peter Shum - May 20, 2020 4:04 AM - CLC - Adoption | | | | |
| View Repc All Reports | SagarActivitiesByStageThisPrevQuarter Sagar Shah - Jun 14, 2020 3:13 PM - Private Reports | | | | |
| Folders | Activities By Stage This and Prev Quarte | | | | |
| Created by Me | Peter Shum - May 20, 2020 3:51 AM - CLC - Adoption | | | | |
| Try refrest Shared with Me | Sagar In Market Accounts No Opportunity Sagar Shah - Jun 14, 2020 2:56 PM - Private Reports | | | | |
| All Folders | In Market Accounts No Opportunities Peter Shum - May 20, 2020 4:15 AM - CLC - Adoption | | | | |
| | Accounts No Activity This Month Peter Shum - May 20, 2020 8:53 AM - CLC - Adoption | | | | |
| | Activities By BOFU BY REP | | | | |





3) Add this new report to the dashboard



Report: Activities by BOFU by rep for this and previous quarter

1) In salesforce lightening view click on the reports tab, click on new report.

| | All 🔻 Q. Search Salesforce | *• 🖬 ? 🌣 🖡 🐻 |
|--|--|---|
| PSA Home Contacts V Accounts V Regions V | Practices \lor Groups \lor Projects \lor Timecards \lor Expense Reports \lor | Billing Event Generation Skills Matrix Reports 🗸 More 💌 🕕 |
| Reports Recent | Q Search recent reports | New Report New Report (Salesforce Classic) New Folder |
| 5 items | | |

- 2) Select the Activities with Accounts object from the list.
- 3) Add 6s Account Buying Stage and Assigned field to the Group Rows

Columns:

- Account Name
- Subject
- 6s Account Profile Fit
- 6s Account Intent Score

Filters:

- Show Me(all activities)
- Date (Current and Previous FQ)
- 6s Account Buying Stage (equals to 'Decision', 'Purchase')
- Show (Open Activities)
- Show(Tasks and Events)

| lds < | ≡ Outline ▼ Filters | 3 | > S | ≡ Outline ▼ Filters 3 |
|-------|----------------------------|----|-------|--|
| Fie | Groups | 啬 | Field | Filters |
| | Add group | Q | | Add filter Q |
| | 6s Account Buying Stage | × | | |
| | Assigned | × | | Show Me All activities |
| | GROUP COLUMNS | | | Data |
| | Add group | Q, | | Current and Previous FQ (Feb 1, 2020 - Jul 31, 2020) |
| | Columns | • | | Show Open Activities |
| | Add column | Q | | Show |
| | Subject | × | | Tasks and Events |
| | Account Name | × | | 6s Account Buying Stage |
| | 6s Account Profile Fit | × | | equals Decision, Purchase |
| | # 6s Account Intent Score | × | | |
| | | | | |



| s < | ≡ Outline ▼ Filter | rs 3 | Previewing a limited number | of records. Run the report to see ev | verything. | | | | | | | Update | Preview Automatically |
|-------|---------------------------|------|-----------------------------|---|-----------------------------|------------------|---|--------------|---|---------------------|----------------------------|---------------------|---|
| Field | Groups | 늡 | | | | | | | | | | | tột |
| | Add group | Q | | 0.05 | | | 2 | Record Count | - | | | | Assigned |
| | 6s Account Buying Stage | × | Decision Cou | rtney Thompson Derek Levine | 1 | 1.5 | 2 | 2.5 | 3 | 3.5 4 | 4.5 | 5 | Courtney Thompson 📒 Derek Levine 📕 |
| | Assigned | × | Assigne | Kyle Gutzler Kyle Hodgkins | | | | | | | | | Kyle Gutzler 📒 Kyle Hodgkins 📒 |
| | GROUP COLUMNS | | Susan Petersor | Michael Conn Schatschneider | | | | | | | | Suran D | Michael Conn 📒 |
| | Add group | Q | Purchase | Fapas Majumdar Ernest Owusu Maura Brady Michael Conn | | | | | | | | 30301 F | Tapas Majumdar Ernest Owusu Maura Brady |
| | Columns | • | | | | | | | | | | | |
| | Add column | Q | 6s Account Buying Stage ↑ 💌 | Assigned 🕇 | Subject | | | | | Account Name | 6s Acc | count Profile Fit 💌 | 6s Account Intent Score |
| | Subject | × | Decision (13) | Courtney Thompson (2) | First On: | ite Meeting | | | | InsightSquared | Strong | 3 | 8 |
| | Account Name | × | | | Discover | y Call | | | | ContentSquare | Strong | 3 | 8 |
| | 6s Account Profile Fit | × | | Subtotal | | | | | | | | | 16 |
| | # 6s Account Intent Score | × | | Derek Levine (5) | First On: | site Meeting | | | | General Motors | Strong | 3 | 7 |
| | | | | | Call with | AE to learn more | | | | Upland Software, Ir | c. Strong | 3 | 8 |
| | | | | | Call | | | | | Upland Software, Ir | c. Strong | 3 | 8 |
| | | | | | Discover | y Call | | | | CenturyLink | Strong | 3 | 8 |
| | | | | | Call w/ | Connor | | | | Epicor Software | Strong | 3 | 7 |
| | | | | Subtotal | | | | | | | | | 321 |
| | | | Row Counts 💙 Detail Ro | ws 💙 Subtotals 💙 | Grand Total | | | 2 011 1 | | 10 | <u>.</u> | P Conditional | Formatting Currency: USD |

4) Save report as 'Activities by BOFU by rep for this and previous quarter'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.

| Bar | Column | Stacked Bar | Column |
|------------------------------|--------------|-------------|--------------|
| Line | Donut | Funnel | Scatter Plot |
| Chart Attrib Chart Title | outes | | |
| Y-Axis 6s Accoun | t Buying Sta | ge | • |
| Assigned | | • | × |
| X-Axis | | | |
| Record Co | unt | | • |
| Show Ref | ference Line | | |
| Reference Li | ne Value | | |
| ο | | | |
| Show Val | ues | | |
| Legend Posit | ion | | |
| Right | | | • |



Dashlet: Activities by BOFU by rep for this and previous quarter

• This dashlet depicts the activities across accounts in decision and purchase buying stage by reps.

1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.

1) Go to the previously created sales dashboard

| | All 👻 🔍 Search Salestorce | |
|--|--|--|
| Dashboard Sagar sales dashboard As of Jun 11, 2020 12:15 PM-Viewing as Sagar Shah | acues < oroups < Projects < Immediates < Expense reports < | Dening event vente durin axino warux Dashobardis V More + + Follow N Refresh Edit + |
| Sagar Accounts In Market Report Sum of 6s Account Intent Score: 48k 20k 0 % 6 View Report (Sagar Accounts In Market Report) | | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'Activities by BOFU by rep for this and previous quarter' report

| Sagar sale | s dashboard | / | | + Component + | Filter 5 C 🏟 Save 🔻 |
|----------------|-----------------|--|-------------------|---------------|-----------------------|
| | 20к | Purchase | Decision Purchase | (1151%) | 312 D3 99%J |
| | | Select Re | eport | | |
| | Reports | Q Search Reports and Folders | | | Reports and Folders 🔻 |
| | Recent | | | | |
| /iew Repc | Created by Me | Sagar Activities By BOFO BY REP Sagar Shah - Jun 14, 2020 3:34 PM - Private Reports | | | |
| | Private Reports | Activities By BOFU BY REP | | | |
| 40 | Public Reports | Peter Shum - May 20, 2020 4:18 AM - CLC - Adoption | | | 18 |
| 10 Count 20 | All Reports | Sagar In Market Accounts No Activity Sagar Shah - Jun 14, 2020 3:24 PM - Private Reports | | | |
| Reco | Folders | In Market Accounts No Activity This Quar Peter Shum - May 20, 2020 4:54 AM - CLC - Adoption | | | |
| | Shared with Me | SagarActivitiesByStageThisPrevQuarter | | | |
| | All Folders | Sagar Shan - Jun 14, 2020 3:13 PM - Private Reports | | | |
| уре 🔳 | | Peter Shum - May 20, 2020 3:51 AM - CLC - Adoption | | | |
| /iew Repo | | Sagar In Market Accounts No Opportunity Sagar Shah - Jun 14, 2020 2:56 PM - Private Reports | | | |
| | | In Market Accounts No Opportunities | | | |
| | | | | | Cancel Select |



3) Add this new report to the dashboard





Report: Accounts with no activities for current month

1) In salesforce lightening view click on the reports tab, click on new report.

| - | All 🔻 🔍 Search Salesforce | 🔭 🖬 ? 🌣 🐥 🐻 |
|--|---|--|
| PSA Home Contacts V Accounts V Regions V | Practices V Groups V Projects V Timecards V Expense Reports V | Billing Event Generation Skills Matri Reports 🗸 More 💌 💿 |
| Reports Recent 5 items | Q Search recent reports | New Report (Salesforce Classic) New Folder 🕸 - |

- 2) Select the Accounts object from the list.
- 3) Add 6s Account Buying Stage and Account Owner field to the Group Rows

Columns:

- Account Name
- Last Activity

Filters:

- Show Me (all accounts)
- Created Date (All Time)
- 6s Account Buying Stage (equals to 'Decision', 'Purchase')
- Account Owner (does not contain CRM Admin)
- Last Activity (greater than or equal Last 31 days)
- # of open S1+ opportunities (equals 0)

| s < | ≡ Outline ▼ Filters | 5 | S < | ≔ Outline | T Filters | 5 | |
|-------|--------------------------------------|--------|-------|---|---------------------|----------|--|
| Field | Groups | ÷ | Field | Filters | | • | |
| | GROUP ROWS | | | Add filter | | Q | |
| | Add group 6s Account Buying Stage | م × | | Show Me All accounts | | | |
| | Account Owner | × | | Created Date All Time | | | |
| | GROUP COLUMNS | 0 | | # of Open S1+ Op equals 0 | portunities | \times | |
| | , idd Brodpin | _ | | Sub-type not equal to Cus | tomer | \times | |
| | Columns | • | | Last Activity greater or equal DAYS | LAST 31 | × | |
| | Add column Account Name | × | | 6s Account Buying equals purchase, | s Stage decision | \times | |
| | Last Activity | × | | Account Owner does not contain | crm admin | \times | |
| | | | | | | | |



| counts No Activit | ty This Month | Accounts | | | | | | | | | | | Got Feed | lback? | 5 0 | G | | • | Close |
|---------------------|---------------|-------------------|-----------------|---------------------------|--------------------|--------|---------------|----|----|------------|---|----|----------|--------|-----|----|--------|-----------|-----------------------------|
| ≡ Outline | ▼ Filters 5 | Previewing a li | imited number (| of records. Run the repor | t to see everythir | g. | | | | | | | | | | | Update | e Previev | w Automatica |
| Groups | ÷ | | | | | | | | | | | | | | | | | | |
| Add group | 0 | | | | | | | | Re | cord Count | | | | | | | | | Account |
| 6s Account Buying S | itage × | | | 0 1 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Katie Noceri Srihari Kun |
| Account Owner | × | O Decision | Katie Nocerino | | | | | | | | | | | | | | | | |
| GROUP COLUMNS | | Acco | | | | | | | | | | | | | | | | | |
| Add group | Q | Furchase | Katie Nocerino | | | | | | | | | | | | | | | | |
| | | is Acco | Srihari Kumar | | | | | | | | | | | | | | | | |
| Columns | T | | | | | | | | | | | | | | | | | | |
| Add column | ٩ | 6s Account Buying | g Stage 🕇 💌 | Account Owner 🕇 💌 | Account Name | | Last Activity | • | | | | | | | | | | | |
| Account Name | × | Decision (16) | | Katie Nocerino (16) | Advisor Group | | 6/9/20 | 20 | | | | | | | | | | | |
| Last Activity | × | | | | TaskUs | | 6/10/20 | 20 | | | | | | | | | | | |
| | | | | | Quest Software | , Inc. | 6/5/20 | 20 | | | | | | | | | | | |
| | | | | | Elastic | | 6/11/20 | 20 | | | | | | | | | | | |
| | | | | | Esri | | 6/9/20 | 20 | | | | | | | | | | | |
| | | | | | Armis | | 6/11/20 | 20 | | | | | | | | | | | |
| | | | | | Teradata | | 6/11/20 | 20 | | | | | | | | | | | |
| | | | | | Ingram Micro | | 6/9/20 | 20 | | | | | | | | | | | |
| | | | | | Epson America | | 6/3/20 | 20 | | | | | | | | | | | |
| | | | | | | | c 10/00 | ~~ | | | | | | | | | | | |

4) Save report as 'Accounts with no activities for current month'. Add the chart in order to see the analytics and update the annotations for X and Y axis. Save and run the report.

| = | llı. | | .11: |
|--|--|-------------|-------------------|
| Bar | Column | Stacked Bar | Stacked Column |
| /~ | 0 | Ē | **** |
| Line | Donut | Funnel | Scatter Plot |
| Chart Attril | butes | | |
| | | | |
| Y-Axis 6s Accour | nt Buying Sta | age | - |
| Y-Axis 6s Accour Account C | nt Buying Sta Owner | age • | • • |
| Y-Axis 6s Accourt Account (K-Axis | nt Buying Sta Owner | age T | • • × |
| Y-Axis 6s Account Account (X-Axis Record Co | nt Buying Sta Dwner Dunt | age • | • • × |
| Y-Axis 6s Account (Account (K-Axis Record Co Show Re | nt Buying Sta Dwner Dunt | age ▼ | • • × |
| Y-Axis 6s Account (K-Axis Record Co Show Re Show Va | nt Buying Sta Dwner Dunt eference Line | age T | • • × • |
| Y-Axis 6s Account (X-Axis Record Co Show Re Show Va Legend Posi | nt Buying Sta Dwner Dunt eference Line Ilues | age V | • • × • |



Dashlet: Accounts with no activities for current month

• This dashlet depicts the accounts which did not have any activities associated with them

1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.

1) Go to the previously created sales dashboard

| BSA Home Contacts of Accounts of Persians of | All V Search Salesforce | Rilling Event Concretion Skills Matrix Dathbards x Marg x |
|---|--|---|
| Contracts Accounts Accounts | radicos o dioupa o rigeos o limetarios o Expense keports o | Handbalds Mole + Follow Refresh Edit + |
| Sagar Accounts In Market Report Sum of 6s Account Intent Score: 49k 20k 92k 92k 92k 92k 92k 92k 92k 92k 92k 92 | | |

2) Click on edit option. Add another component to the existing sales dashboard. Select the 'Accounts with no activities for current month' report

| Sagar sale | s dashboard | / | + Component + Filter 5 C 🕸 Save 🔻 Dr |
|------------|-----------------|--|--------------------------------------|
| | 6x | | × |
| View Repo | | Select Report | |
| | Reports | Q. Search Reports and Folders | Reports and Folders 🔻 |
| 40 | Recent | | 180 |
| 20 | Created by Me | Sagar Accounts No Activity This Month Sagar Shah - Jun 14, 2020 3:40 PM - Private Reports | |
| | Private Reports | Accounts No Activity This Month | |
| c | Public Reports | Peter Shum - May 20, 2020 8:53 AM - CLC - Adoption | |
| | All Reports | Sagar Activities By BOFU BY REP Sagar Shah - Jun 14, 2020 3:34 PM - Private Reports | |
| | Folders | Activities By BOFU BY REP | |
| ype 🔳 | Created by Me | Peter Shum - May 20, 2020 4:18 AM - CLC - Adoption | |
| /iew Repo | Shared with Me | Sagar In Market Accounts No Activity Sagar Shah · Jun 14, 2020 3:24 PM · Private Reports | |
| | All Folders | In Market Accounts No Activity This Quar | |
| | | Peter Shum - May 20, 2020 4:04 AM - CLC - Adoption | |
| | | SagarActivitiesByStageThisPrevQuarter Sagar Shah - Jun 14, 2020 3:13 PM - Private Reports | |
| | | Activities Bv Stage This and Prev Ouarte | |
| | | | Cancel Select |



3) Add this new report to the dashboard





Dashboard Filtering

Each of the tiles can be filtered by the overall dashboard filters. This example shows the filtering by "Account Owner" person.

| Dashboard CLC Templates - Sales Dashboard As of Jun 15, 2020 9:51 AM·Viewing as Peter Shum Account Owner | |
|---|---|
| equals Dasha Vasilyeva | • |
| All | |
| ✓ equals Dasha Vasilyeva | |
| equals Tim McGoldrick | |
| equals Conor Moakley | |
| equals Mike Mann | |
| equals Katie Nocerino | |

STEPS:

1. Edit the dashboard and select the "+ Filter" at the top of the dashboard page

| CLC Templates - Sales Dashboard | | + Component + Filter |
|---------------------------------|------------------------|----------------------|
| Account Owner | ✓ | |

2. Search for the field that represents the Account Owner/Rep/Exec to filter down accounts. In this example, the field is named "Account Owner"



Add Filter

| * Field | |
|---------------------------------------|---|
| Account Owner | Q |
| Account: Custom Info (Accounts) | |
| Account Ownership | |
| Account General (Accounts) | |
| Account Owner | |
| Account Owner: Custom Info (Accounts) | |
| AE or IS Start Date | |
| Alyce Oauth Expires In | |
| Employee Start Date | |
| Last Day of QTR | |
| | |

3. SELECT "Account Owner" and add the names of all reps



Display Name

Account Owner

Filter Values (25)

| 1 | Dasha Vasilyeva | × |
|---|-----------------|---|
| 2 | Tim McGoldrick | × |
| 3 | Conor Moakley | × |
| 4 | Mike Mann | × |
| 5 | Katie Nocerino | × |
| 6 | Mason Colombo | × |
| 7 | Zak Garner | × |
| | | |

Add Filter Value

Cancel Update

4. Save the dashboard filter