

# SFDC Sales Dashboard configuration

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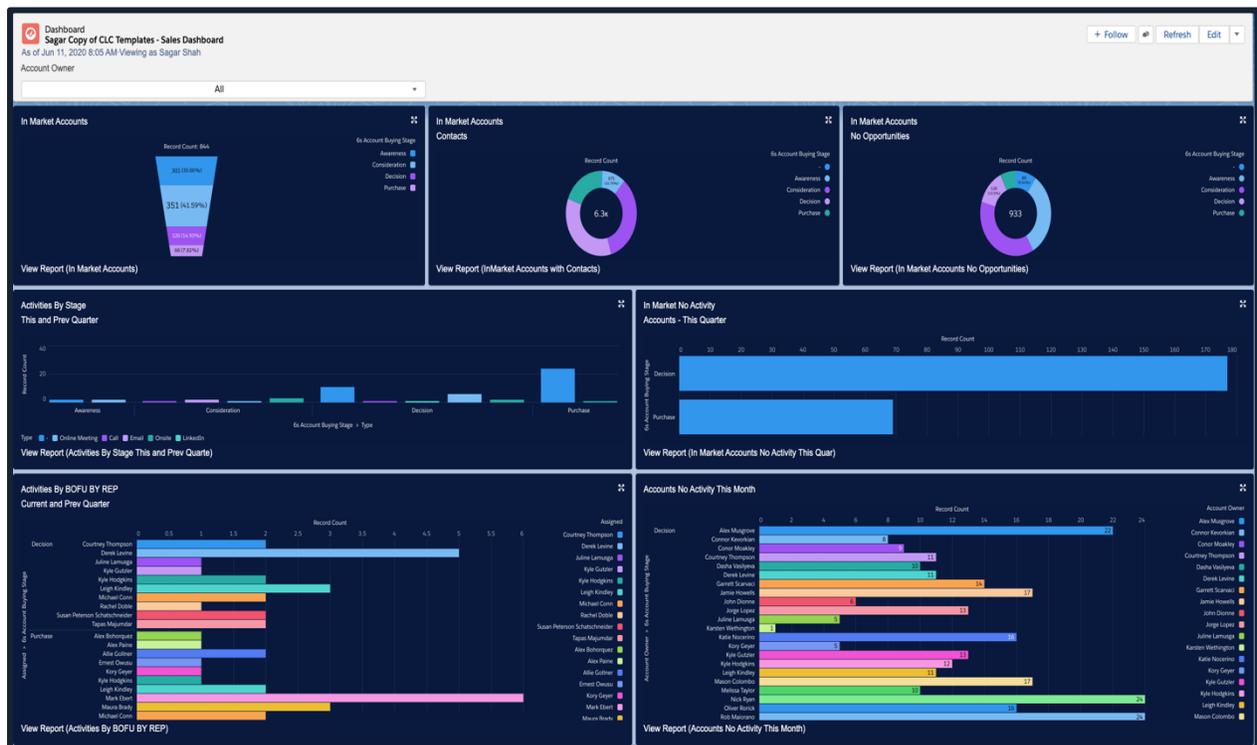
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## Overview

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 (such 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.



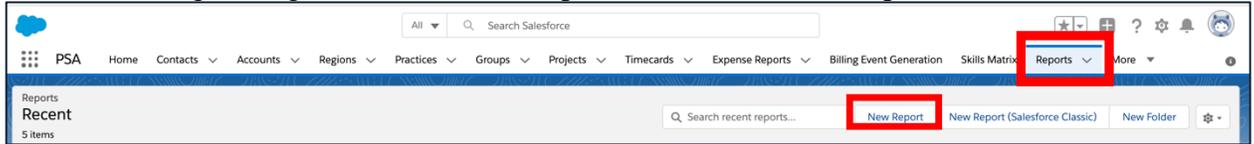


## Assumptions

- ❖ 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 lightning view click on the reports tab, click on new report.



- 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')

The image displays two side-by-side screenshots of the 6sense reporting interface for 'In Market Accounts'. Both screenshots show a 'REPORT' dropdown menu and a 'Filters' button with a '2' indicator.

**Left Screenshot:** The 'Fields' sidebar is expanded to show 'Groups' and 'Columns'. Under 'Groups', there is a search bar 'Add group...', a selected group '6s Account Buying Stage', and another search bar 'Add group...'. Under 'Columns', there is a search bar 'Add column...' and a list of columns: 'Account Name', '# 6s Account Intent Score', '6s Account Profile Fit', '6s Company Industry', '6s Company LinkedIn URL', and '6s Company Revenue Range'. Each column has a close button 'x'.

**Right Screenshot:** The 'Fields' sidebar is expanded to show 'Filters'. There is a search bar 'Add filter...', a filter 'Show Me All accounts', a filter 'Created Date Current and Previous Month (May 1, 2020 - Jun 30, 2020)', and a filter '6s Account Buying Stage equals Awareness, Consideration, Decision, Purchase' with a close button 'x'.

## Full report view

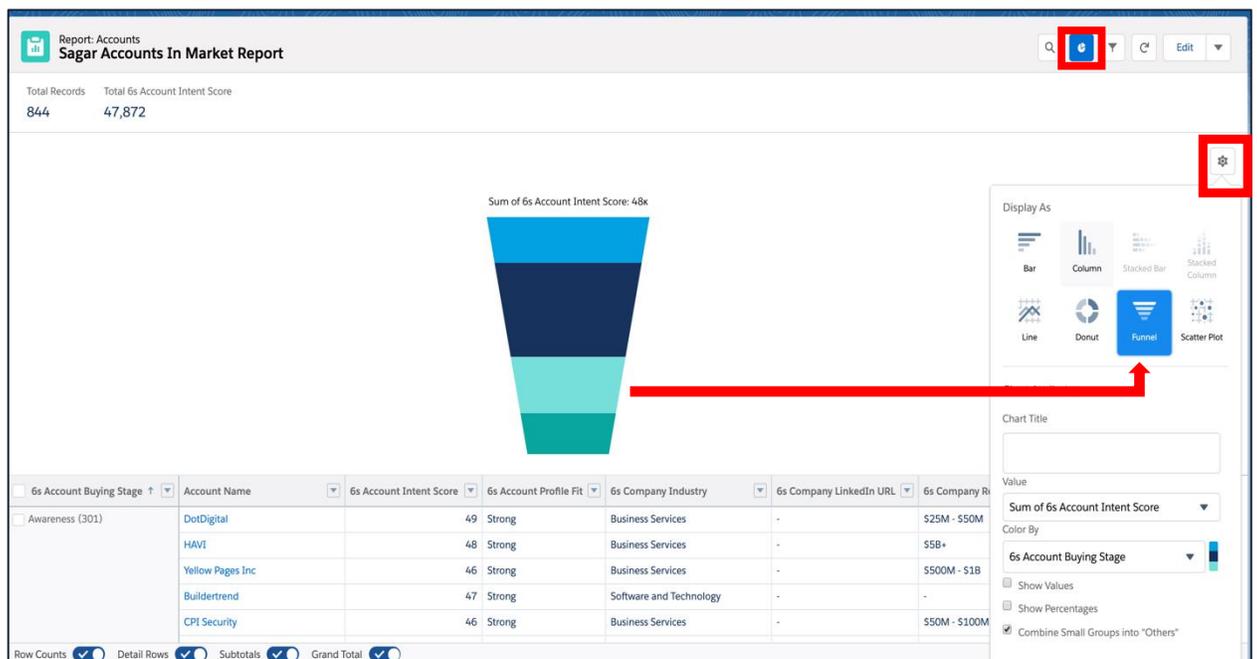
REPORT ▾ Sagar Accounts In Market Report Accounts

Got Feedback? Add Chart Save & Run Save Close Run

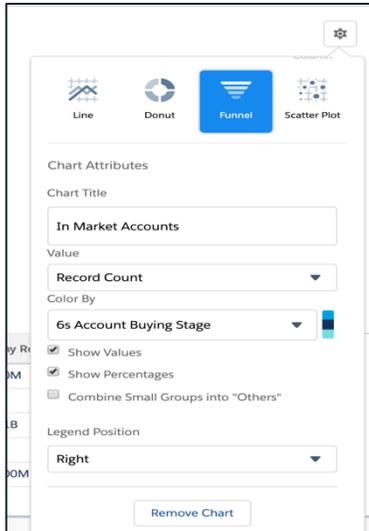
Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

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
Awareness (1)	DotDigital	49	Strong	Business Services	-	\$25M - \$50M
Subtotal		49				
Consideration (4)	Dell Tech	59	Strong	Software and Technology	-	\$5B+
	Walter Surface Technologies	56	Strong	Electrical/Electronic Manufacturing	-	\$25M - \$50M
	Sprout	66	Moderate	Business Services	-	\$25M - \$50M
	Unknown	69	Moderate	Healthcare and Medical	-	\$50M - \$100M
Subtotal		250				
Decision (12)	Snappy	80	Weak	Consumer Goods and Services	-	\$5M - \$10M
	Clear Value BV	83	Moderate	Business Services	-	\$1 - \$1M
	The Click Exchange	78	Weak	-	-	-
	LUCID Citra Komunika	71	Weak	-	-	-
	mailop	75	Weak	Business Services	-	\$5B+
	Thompson Hine	75	Moderate	Business Services	-	\$100M - \$250M
	RapidDeploy	75	Strong	Software and Technology	-	\$10M - \$25M
	Prospect-Experience	71	Weak	-	-	-
	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.



5) Update the annotations for X and Y axis

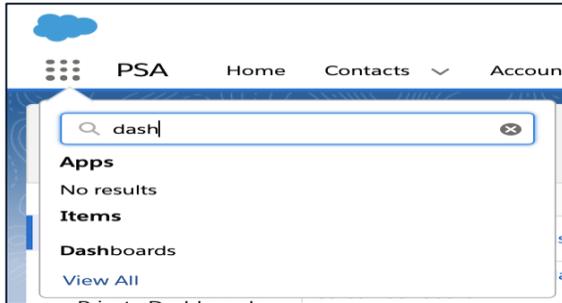


6) Once the report is ready, we will create a new dashboard.

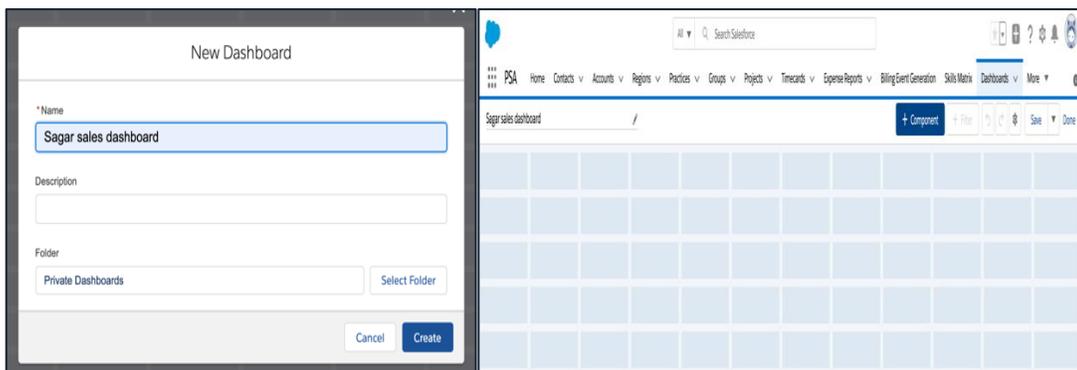
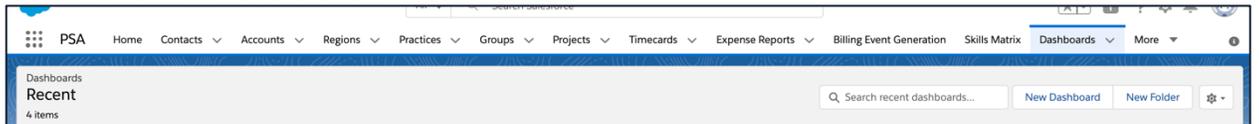
## Dashlet: In Market Accounts

- 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



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.

### Add Component

Report: Sagor Accounts In Market Report

Use chart settings from report

Display As: [Icons for various chart types]

Value: Sum of 6s Account Intent Score

Display Units: Shortened Number

Color By: 6s Account Buying Stage

Show Values  
 Show Percentages  
 Combine Small Groups into "Others"

Decimal Places: [Dropdown]

Preview: Sagor Accounts In Market Report

Sum of 6s Account Intent Score: 48k

6s Account Buying Stage

- Awareness
- Consideration
- Decision
- Purchase

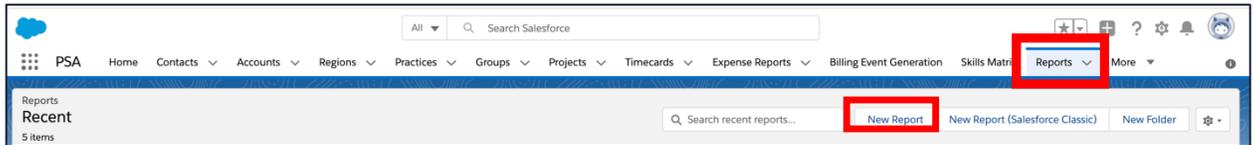
6s Account Buying Stage	Value
Awareness	12k
Consideration	20k
Decision	9.5k
Purchase	6k

View Report (Sagor Accounts In Market Report)

Buttons: Cancel, Add

## Report: In Market Account Contact

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



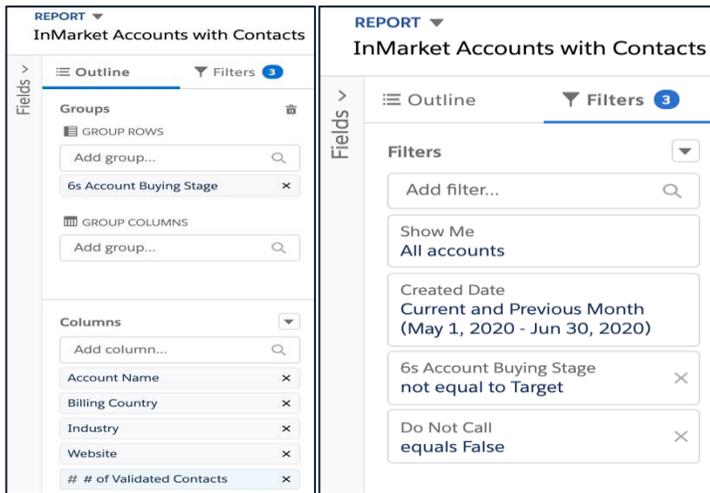
- 2) Select the Contacts & Account object from the list.
- 3) Add 6s Account Buying Stage to the Group Rows

### Columns:

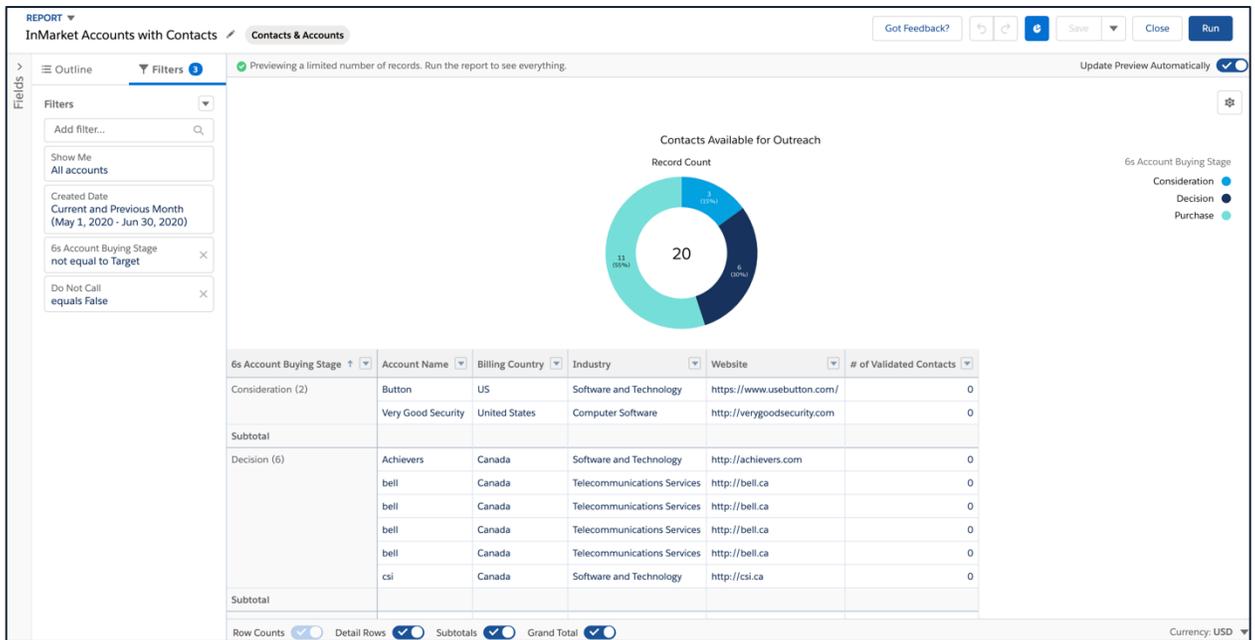
- Account Name
- Billing Country
- Industry
- Website
- # of validated Contacts

### Filters:

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



## Full report view



- 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    **Donut**    Funnel    Scatter Plot

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Chart Attributes

Chart Title

Contacts Available for Outreach

Value

Record Count

Sliced By

6s Account Buying Stage

Show Values

Show Percentages

Combine Small Groups into "Others"

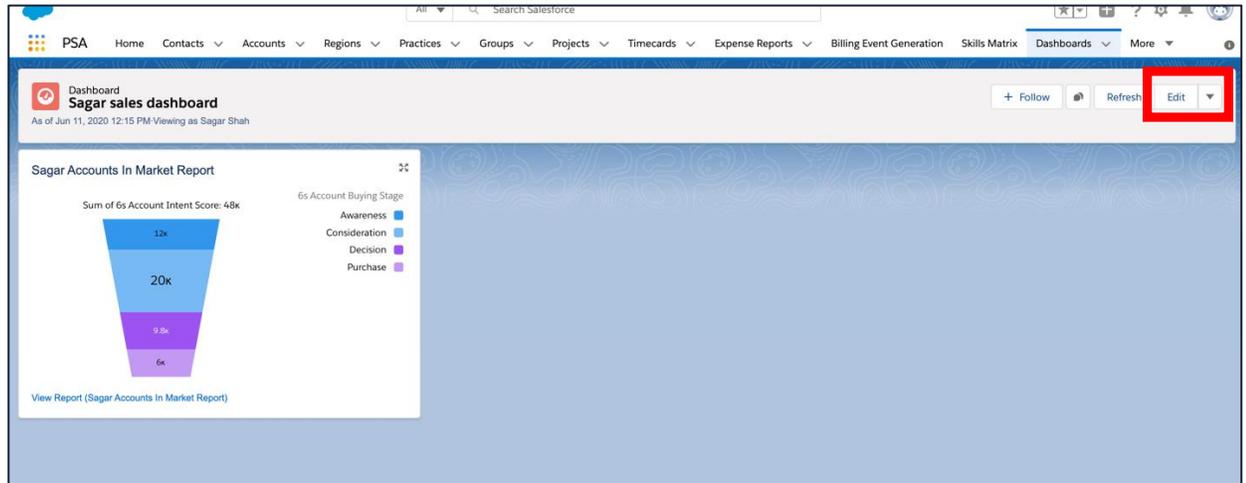
Show Total

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
- Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.
    - Go to the previously created sales dashboard



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

Select Report

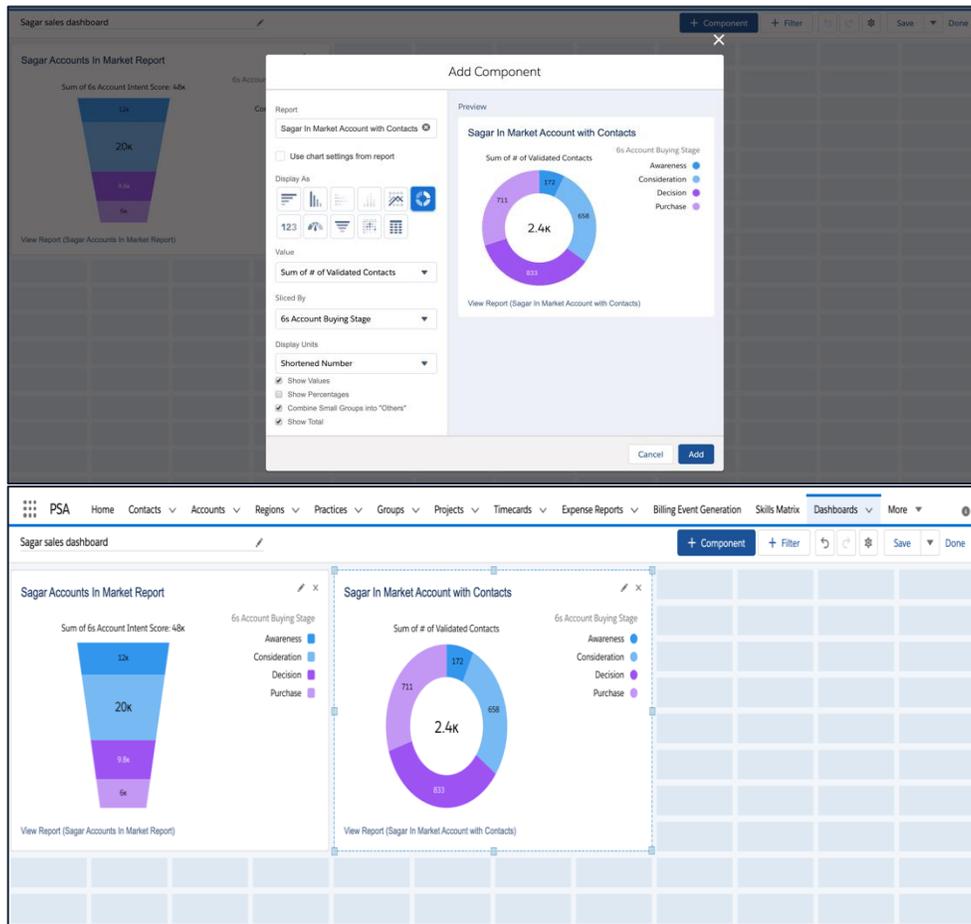
Search Reports and Folders...

Report Name	Author	Created At	Access
Sagar In Market Account with Contacts	Sagar Shah	Jun 11, 2020 12:25 PM	Private Reports
InMarket Accounts with Contacts	Peter Shum	May 20, 2020 3:52 AM	CLC - Adoption
Sagar Accounts In Market Report	Sagar Shah	Jun 11, 2020 9:54 AM	Private Reports
In Market Accounts	Peter Shum	May 20, 2020 3:41 AM	CLC - Adoption
Missing TimeCards Consultants	Peter Shum	Jun 8, 2020 4:05 PM	1.E) Customer Success Reports
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

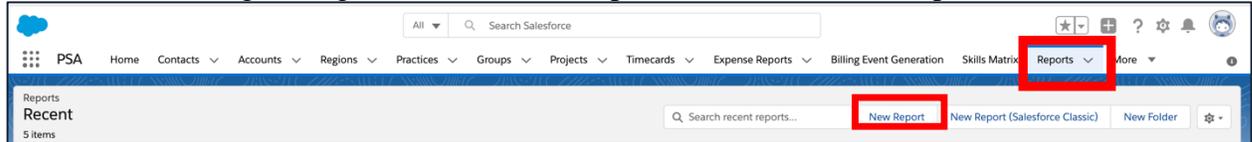
Cancel Select

3) Add this new report to the dashboard



## Report: In Market Account No Opportunities

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



2) Select the Account with Opportunities object from the list.

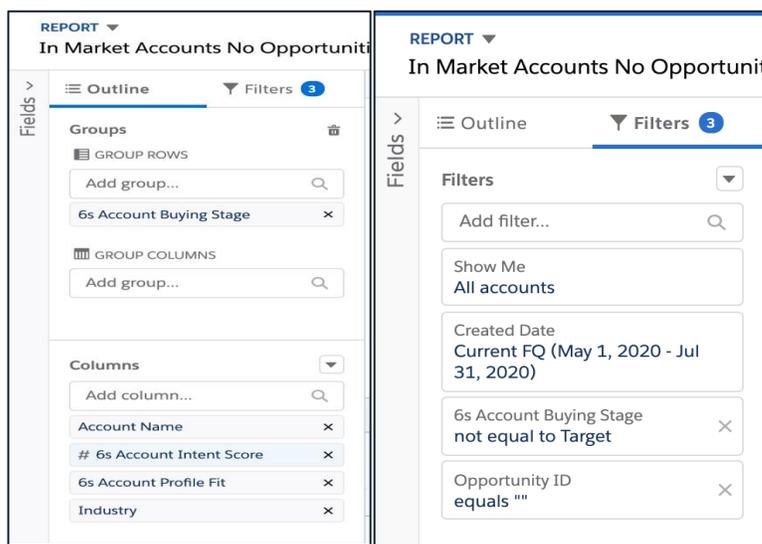
3) Add 6s Account Buying Stage to the Group Rows

### Columns:

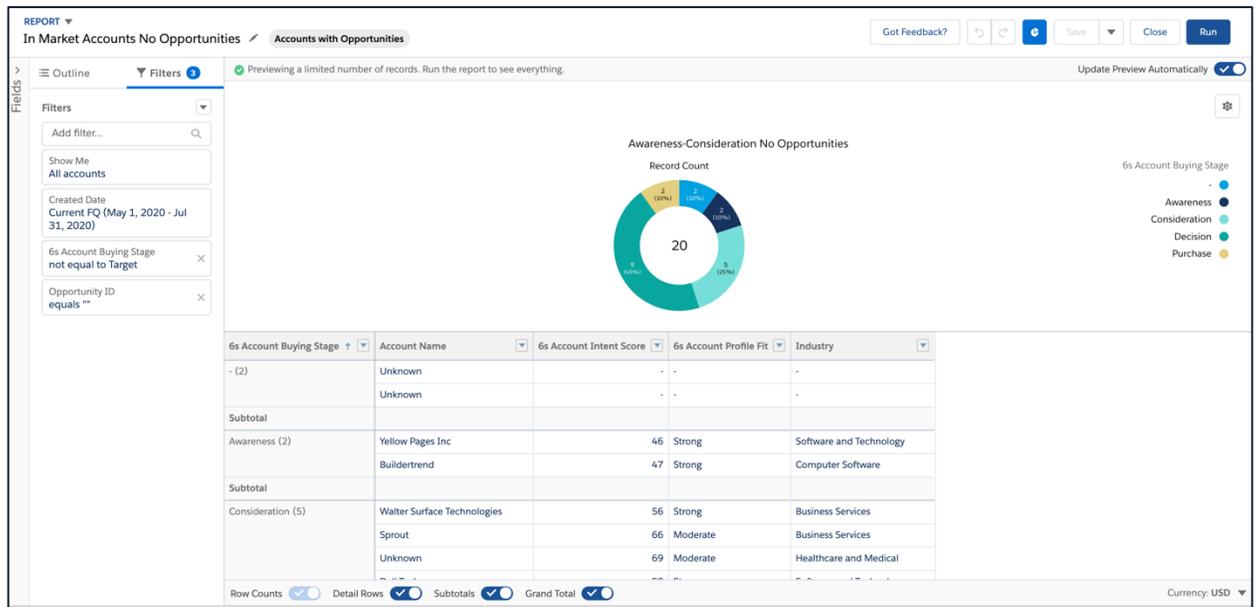
- Account Name
- 6s Account Intent Score
- 6s Account Profile Fit
- Industry

### Filters:

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



## Full report view



- 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.

The configuration panel shows the following settings for the donut chart:

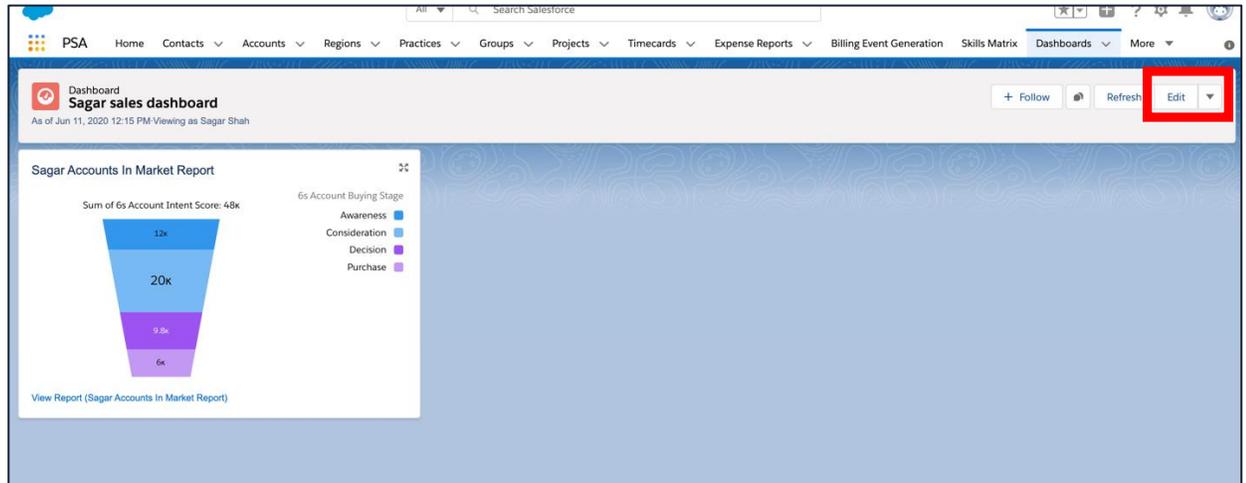
- Chart Type:** Donut
- Chart Title:** Awareness-Consideration No Opportunities
- Value:** Record Count
- Sliced By:** 6s Account Buying Stage
- Options:**
  - Show Values:
  - Show Percentages:
  - Combine Small Groups into "Others":
  - Show Total:
- Legend Position:** Right

## 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

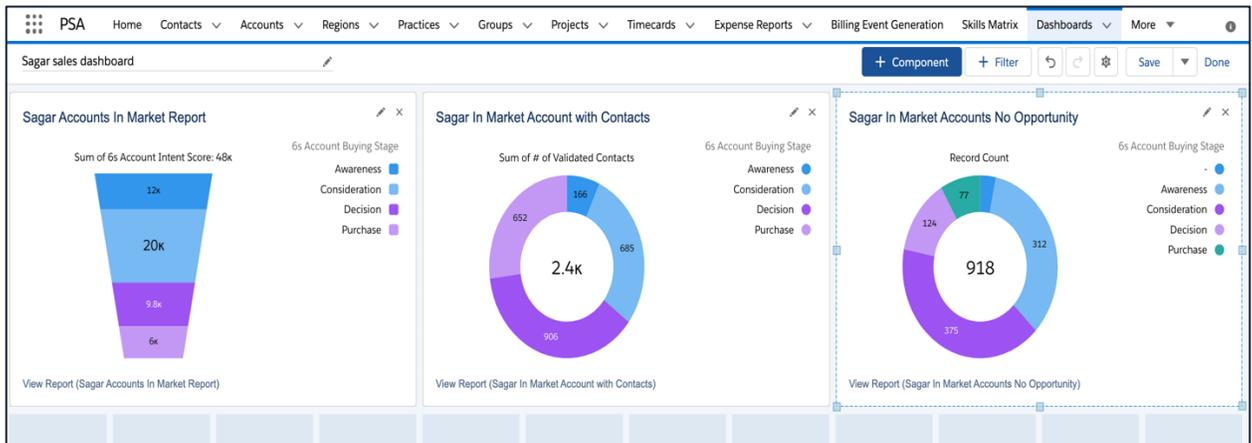
1) Once the report is ready, we will add a new tile from this new report in the existing sales dashboard.

1) Go to the previously created sales dashboard



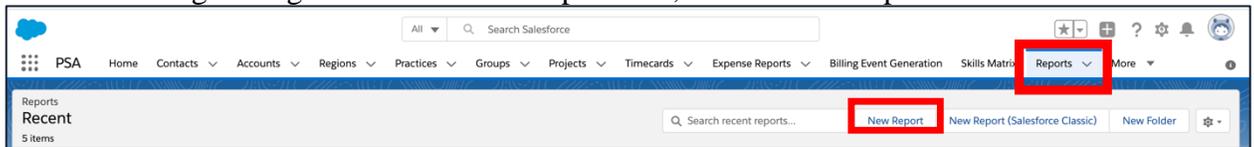
2) Click on edit option. Add another component to the existing sales dashboard. Select the 'In-Market Accounts No Opportunity' report

### 3) Add this new report to the dashboard

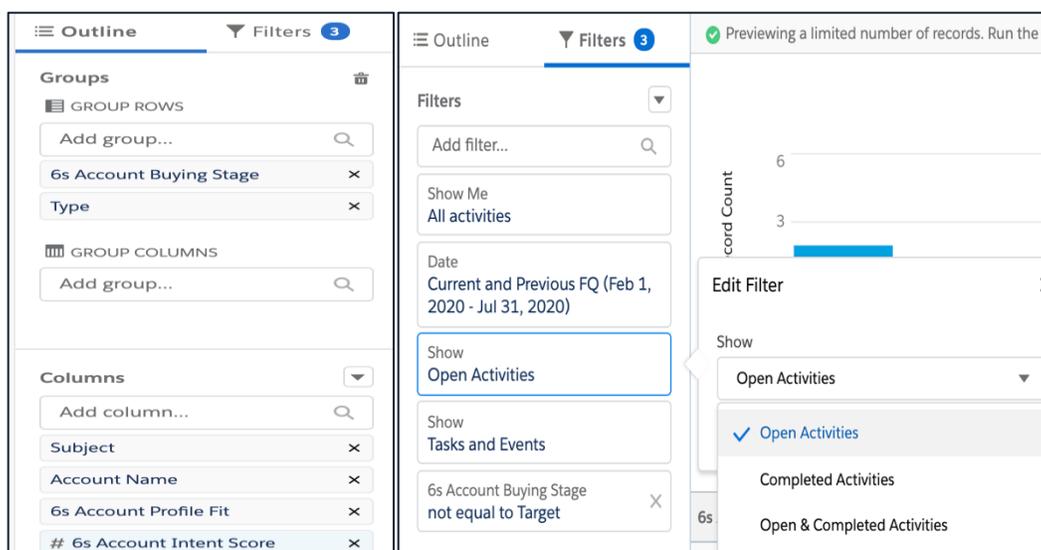


## Report: Activities by stage for this and previous quarter

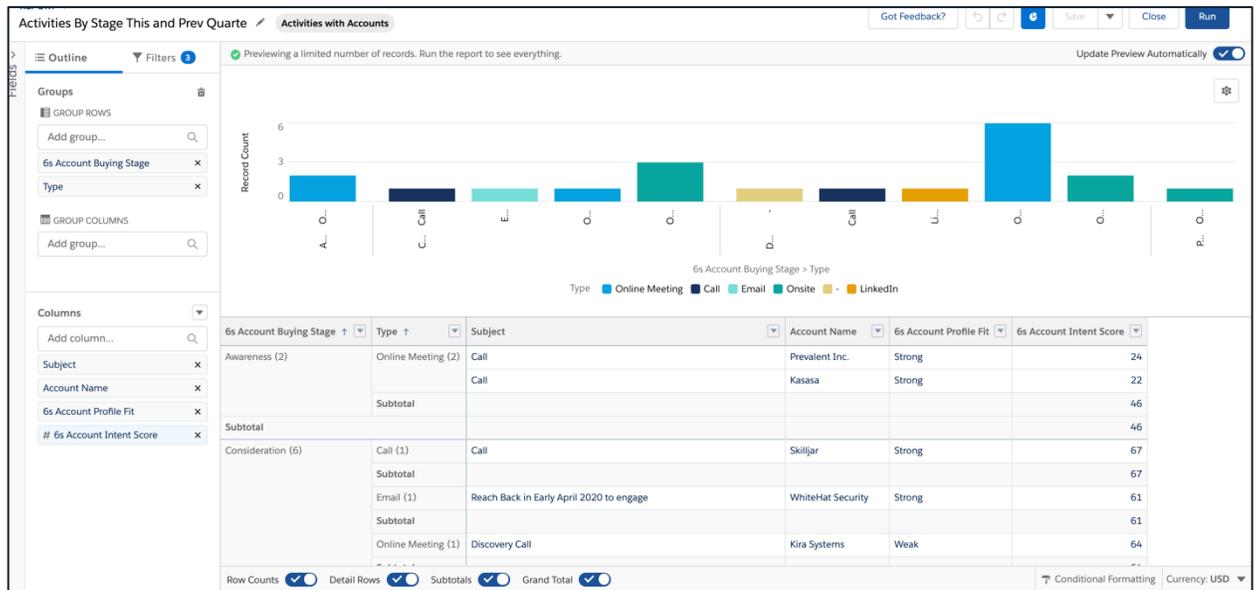
- 1) In salesforce lightning view click on the reports tab, click on new report.



- 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)



## Full report view



- 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.

**Chart Attributes**

Chart Title

X-Axis

6s Account Buying Stage

Type

Y-Axis

Record Count

Show Reference Line

Reference Line Value

0

+ Measure

Show Values

Legend Position

Bottom

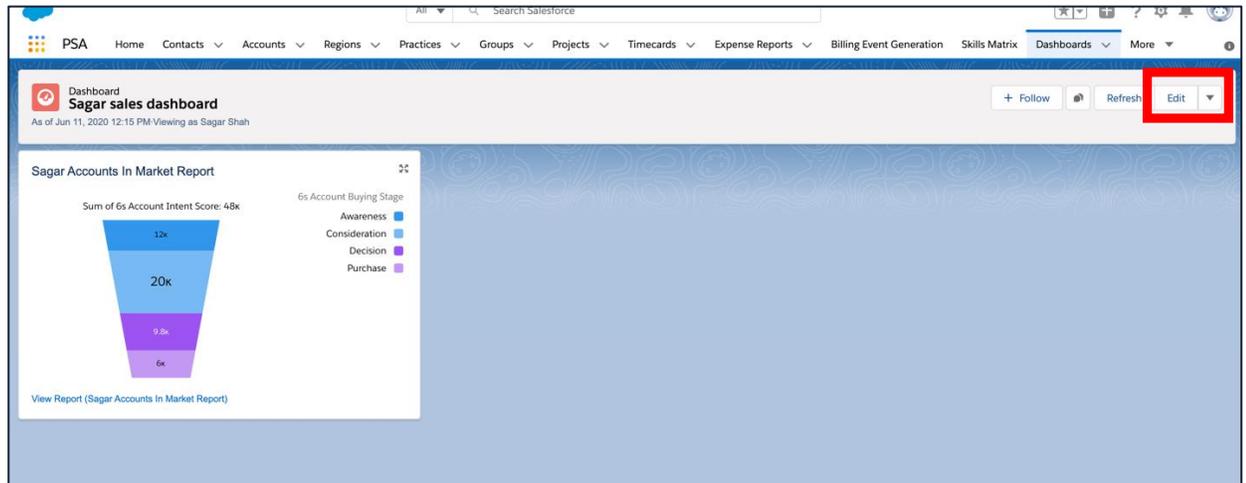
Remove Chart

## Dashlet: Activities by stage for this and previous quarter

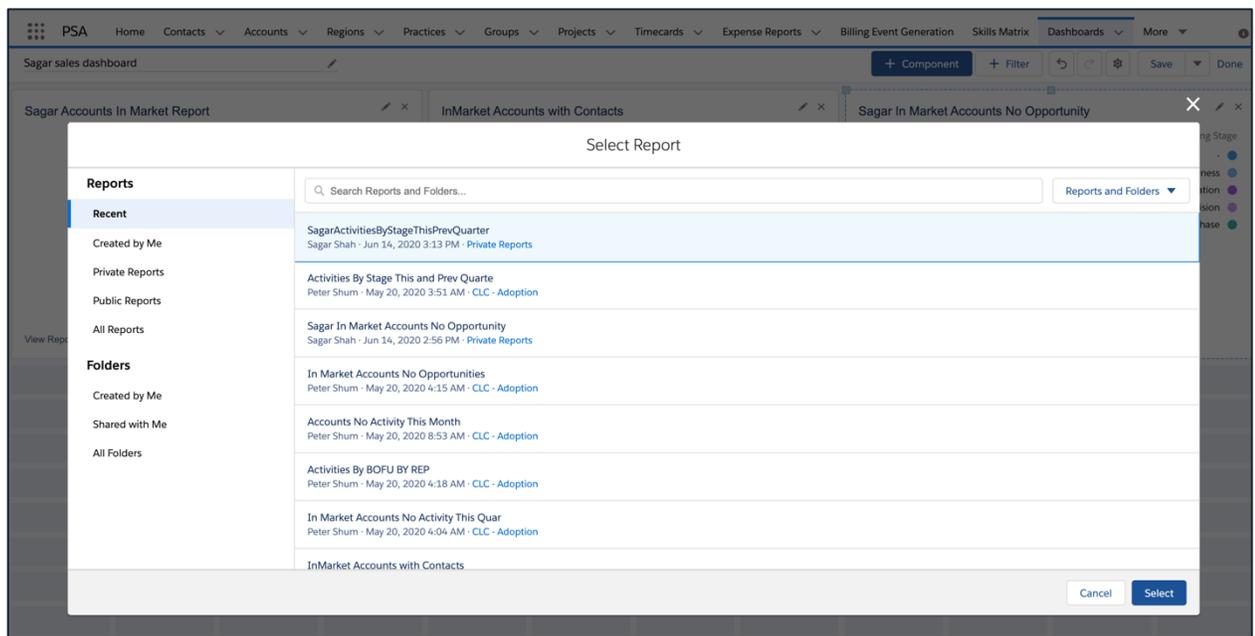
- This dashlet depicts the activities by stage for the accounts across buying stages

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



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



3) Add this new report to the dashboard

Add Component

**Report**

SagarActivitiesByStageThisPrevQuarte

Use chart settings from report

**Display As**

123

**X-Axis**

6s Account Buying Stage

Type

**Y-Axis**

Sum of 6s Account Intent Score

**+ Measure**

Display Units

Shortened Number

**Preview**

**SagarActivitiesByStageThisPrevQuarter**

View Report (SagarActivitiesByStageThisPrevQuarter)

Cancel Add

PSA Home Contacts Accounts Regions Practices Groups Projects Timecards Expense Reports Billing Event Generation Skills Matrix Dashboards More

Sagar sales dashboard

**Sagar Accounts In Market Report**

Sum of 6s Account Intent Score: 48k

View Report (Sagar Accounts In Market Report)

**InMarket Accounts with Contacts**

Record Count

View Report (InMarket Accounts with Contacts)

**Sagar In Market Accounts No Opportunity**

Record Count

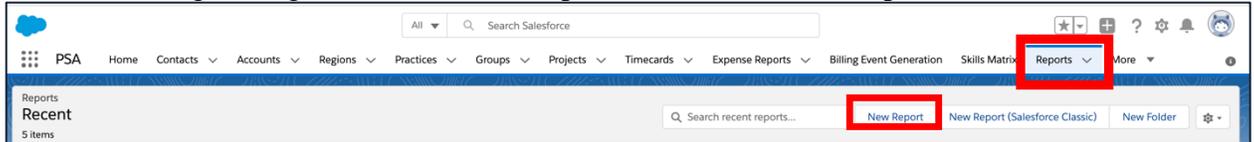
View Report (Sagar In Market Accounts No Opportunity)

**SagarActivitiesByStageThisPrevQuarter**

View Report (SagarActivitiesByStageThisPrevQuarter)

## Report: In market accounts no activities this quarter

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



- 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)

## Full report view

6s Account Buying Stage	Account Name	Sub-type	CRM	MAP	BDR	CSM	6s Account Intent Score	6s Account Profile Fit
Decision (12)	Instapage	Prospect	-	Marketo	Julia Monet Rodriguez	-	84	Strong
	SHIFT Communications	Prospect	Salesforce	Marketo	Karsten Wethington	-	84	Strong
	Synthio	Prospect	-	Pardot	Karsten Wethington	-	81	Strong
	Scalyr	Prospect	-	-	Karsten Wethington	-	81	Strong
	TripActions	Prospect	-	-	Stella Woo	-	80	Strong
	Prontoforms	Prospect	-	-	Karsten Wethington	-	78	Strong
	NEC Display Solutions	Prospect	-	-	Arianny Arias	-	73	Strong
	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

**Bar** Column Stacked Bar Stacked Column

Line Donut Funnel Scatter Plot

---

Chart Attributes

Chart Title

Y-Axis

6s Account Buying Stage

X-Axis

Record Count

Show Reference Line

Show Values

---

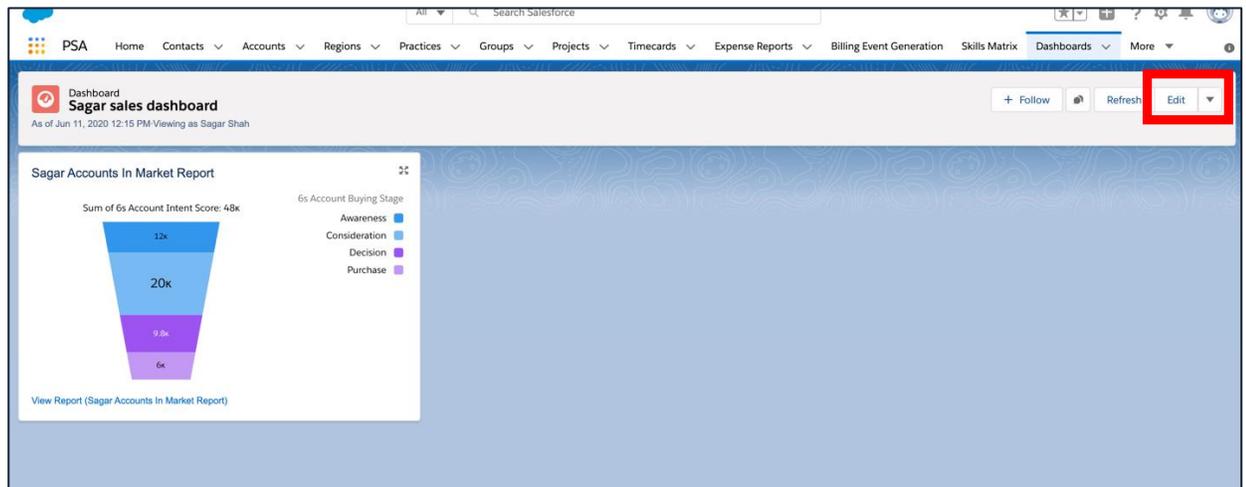
Remove Chart

## Dashlet: In market accounts no activities this quarter

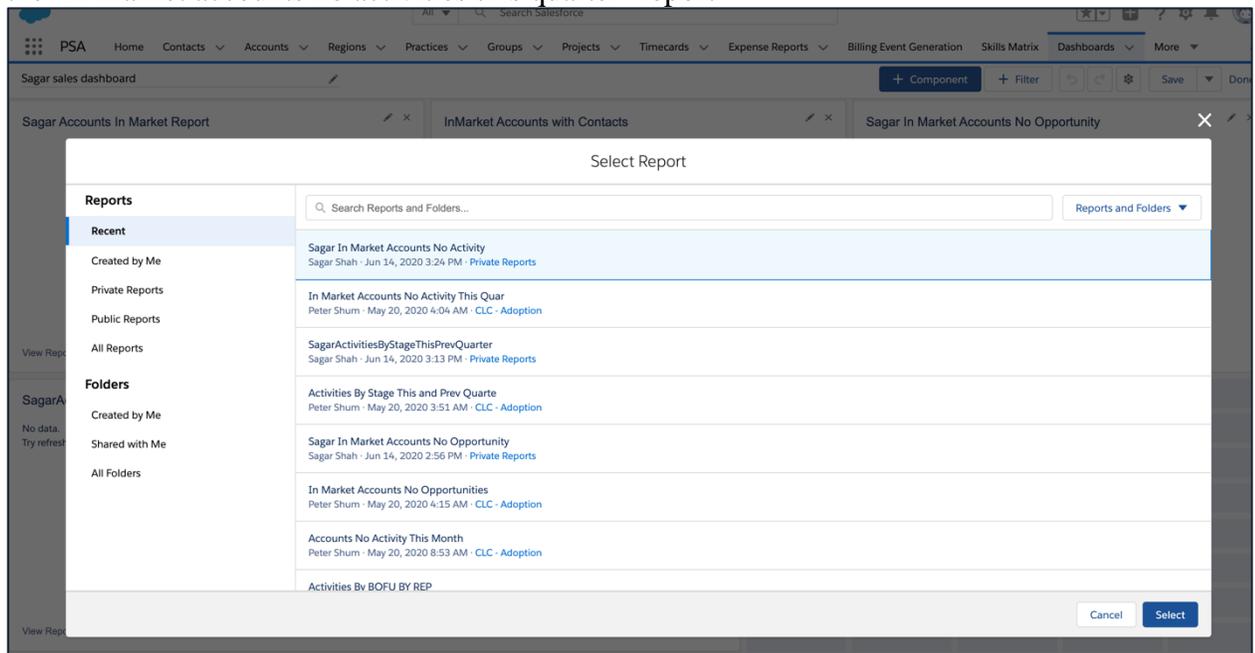
- This dashlet depicts the accounts which are in market but have no activities associated with them

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

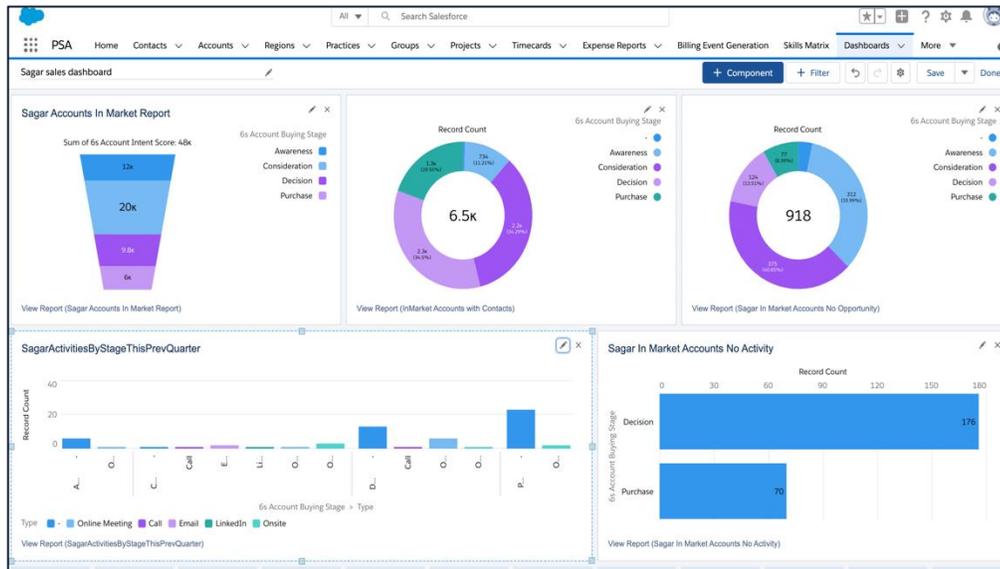
1) Go to the previously created sales dashboard



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

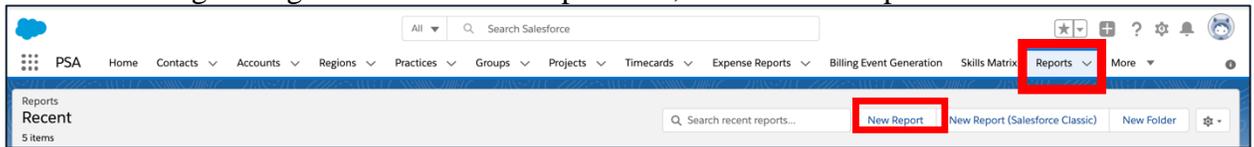


### 3) Add this new report to the dashboard



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

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



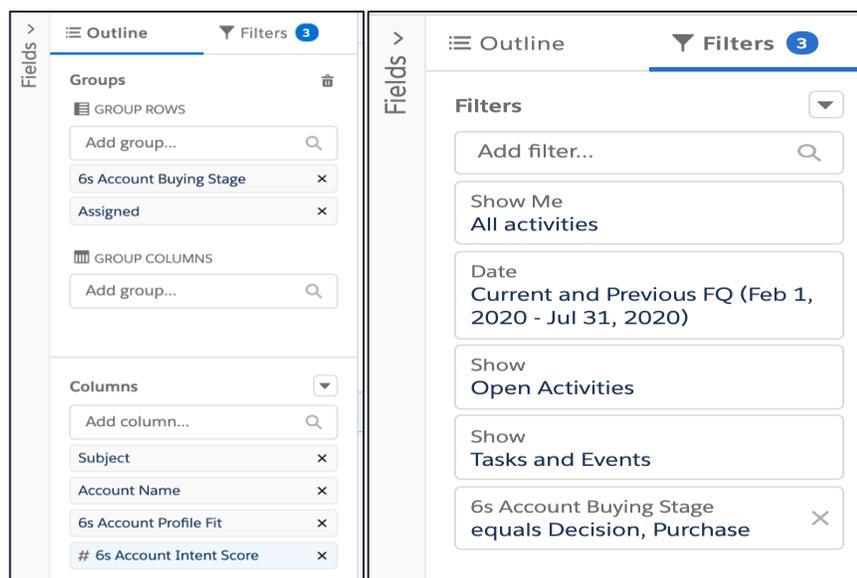
- 2) Select the Activities with Accounts object from the list.
- 3) Add 6s Account Buying Stage and Assigned field to the Group Rows

### Columns:

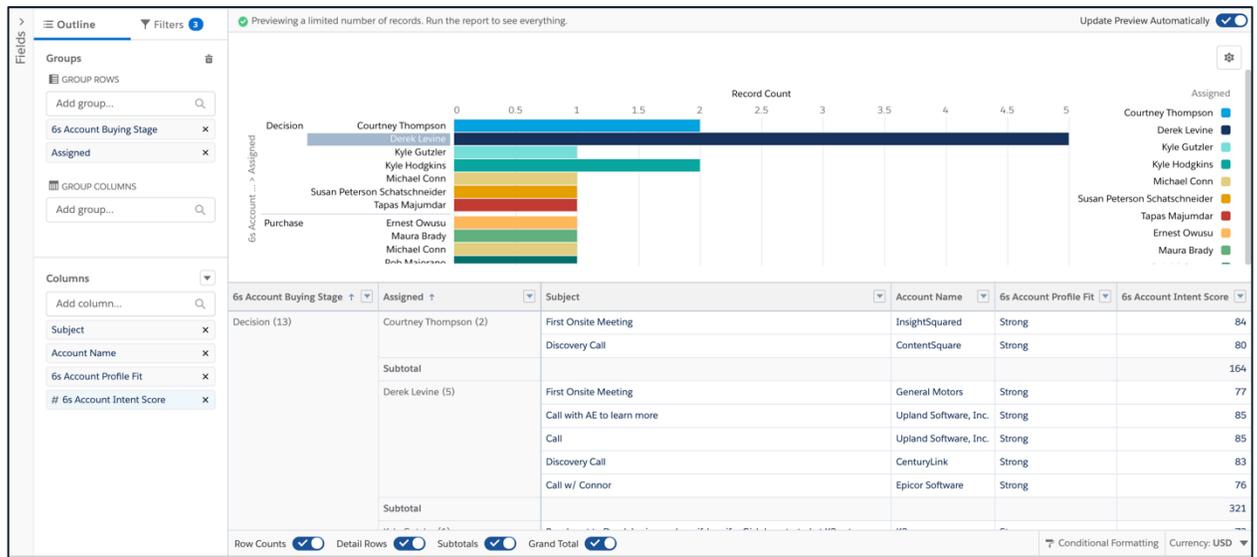
- Account Name
- Subject
- 6s Account Profile Fit
- 6s Account Intent Score

### 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)



## Full report view



- 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.

**Chart Configuration Panel:**

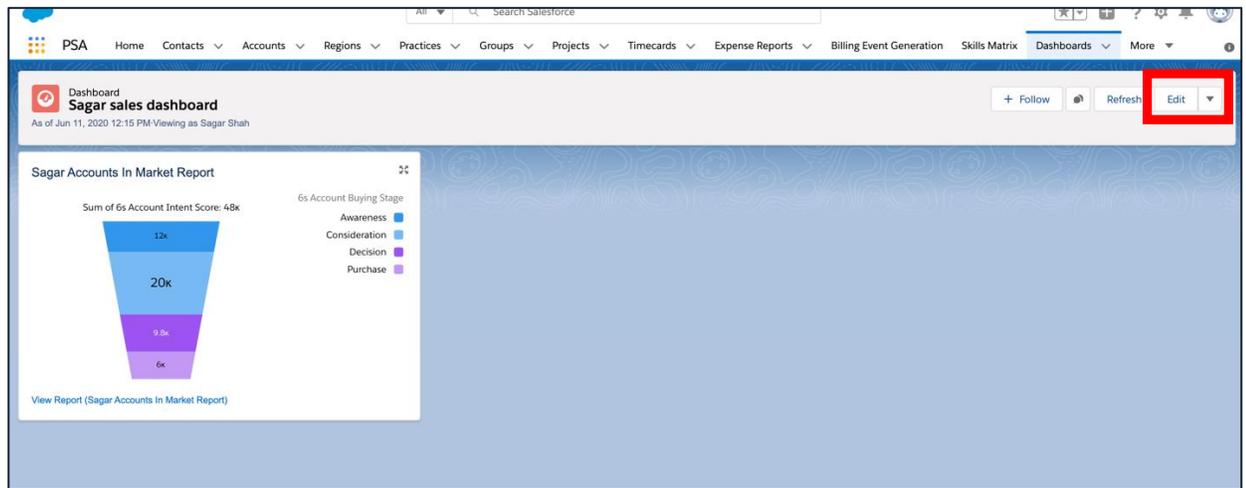
- Chart Type:** Horizontal Bar
- Chart Attributes:**
  - Chart Title:** [Empty field]
  - Y-Axis:** 6s Account Buying Stage
  - X-Axis:** Record Count
  - Assigned:** [Dropdown menu]
  - Show Reference Line
  - Reference Line Value: 0
  - Show Values
  - Legend Position: Right

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

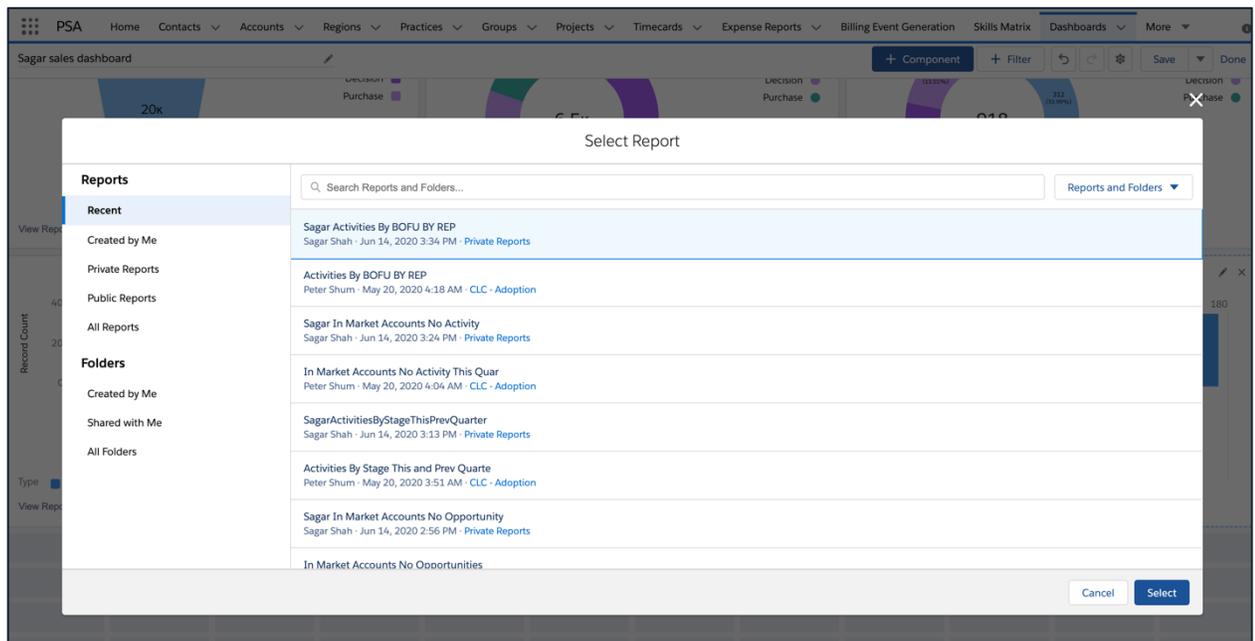
- This dashlet depicts the activities across accounts in decision and purchase buying stage by reps.

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



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



### 3) Add this new report to the dashboard

The screenshot shows the Salesforce dashboard interface with an 'Add Component' dialog box open. The dialog box contains the following information:

- Report:** Sagar Activities By BOFU BY REP
- Use chart settings from report:**
- Display As:** [Bar Chart]
- Y-Axis:** 6s Account Buying Stage
- Assigned:** [Dropdown]
- X-Axis:** Sum of 6s Account Intent Score
- Display Units:** Shortened Number
- Show Values:**
- Show Chatter Photos:**

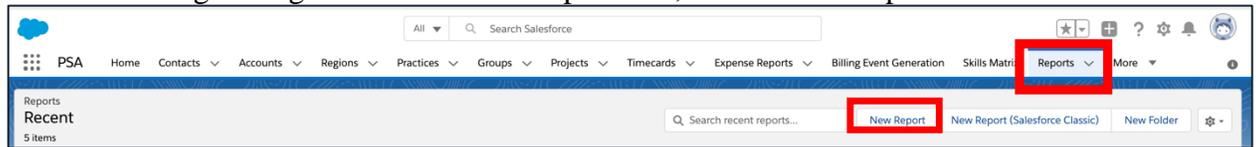
The preview shows a bar chart titled 'Sagar Activities By BOFU BY REP' with the following data:

Assigned - 6s Account Buying Stage	Sum of 6s Account Intent Score
De...	82
Co...	115
De...	319
Er...	85
Jul...	105
Kyl...	153
Le...	229
Li...	82
Ra...	82
Sh...	147
Sus...	168
Durr...	82

The background dashboard shows a 'Sagar sales dashboard' with a funnel chart, a bar chart, and a table. The bar chart shows 'Record Count' for various '6s Account Buying Stage' types. The table shows 'Sagar Activities By BOFU BY REP' with columns for 'Sum of 6s Account Intent Score' and 'Assigned'.

## Report: Accounts with no activities for current month

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



2) Select the Accounts object from the list.

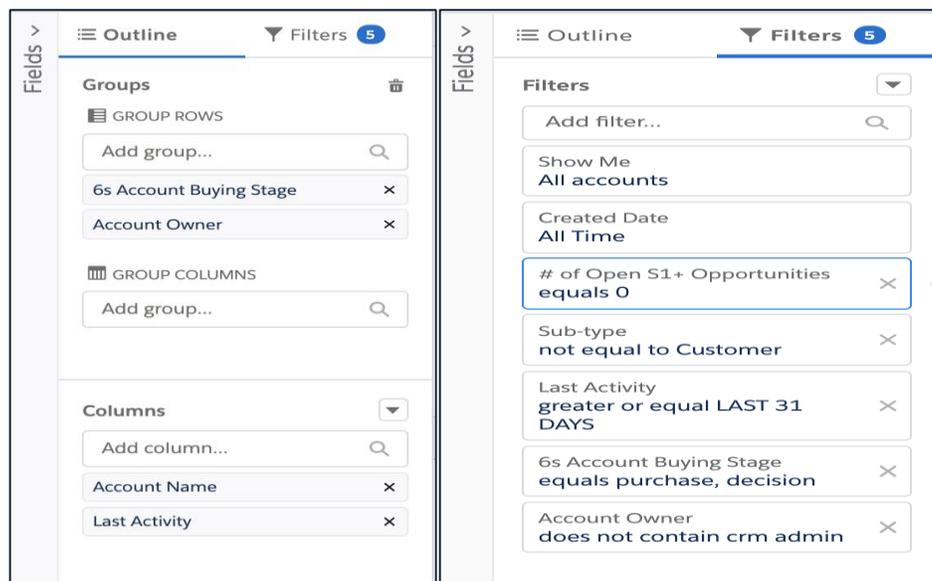
3) Add 6s Account Buying Stage and Account Owner field to the Group Rows

### Columns:

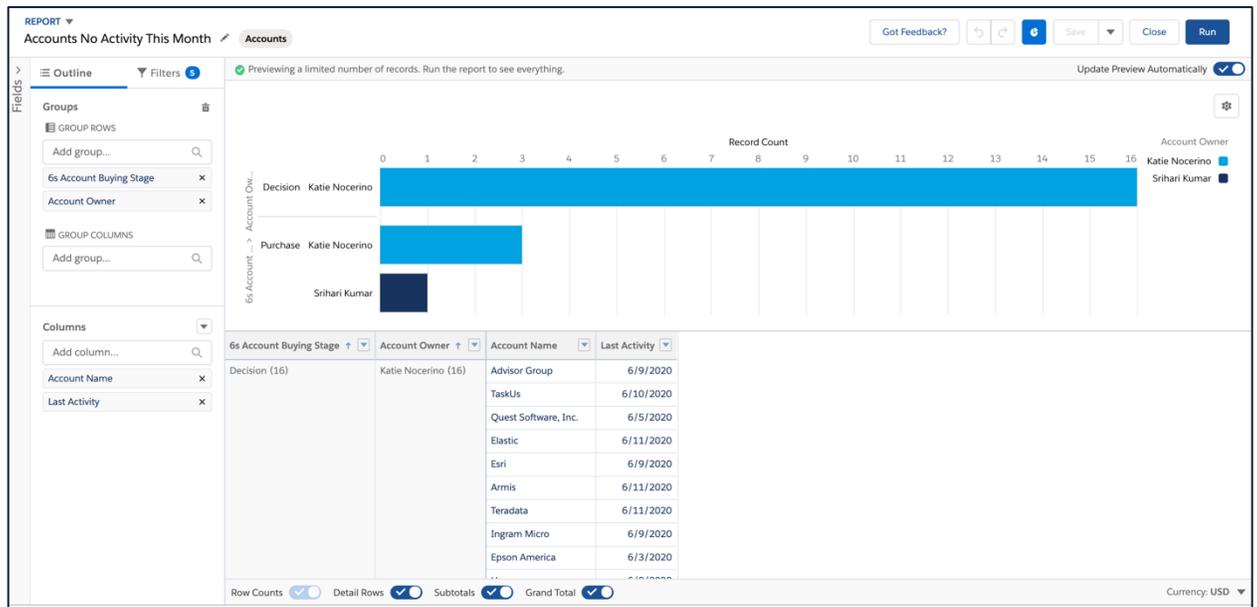
- Account Name
- Last Activity

### Filters:

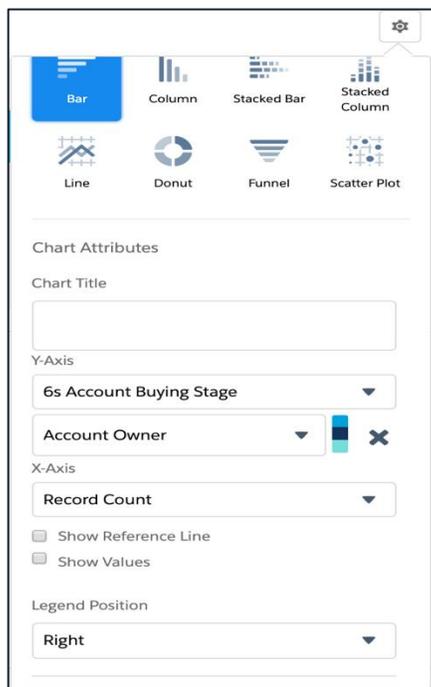
- Show Me (all accounts)
- Created Date (All Time)
- 6s Account Buying Stage (equals to 'Decision', 'Purchase')
- Account Owner (does not contain CRM Admin)
- Last Activity (greater than or equal Last 31 days)
- # of open S1+ opportunities (equals 0)



## Full report view



- 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.

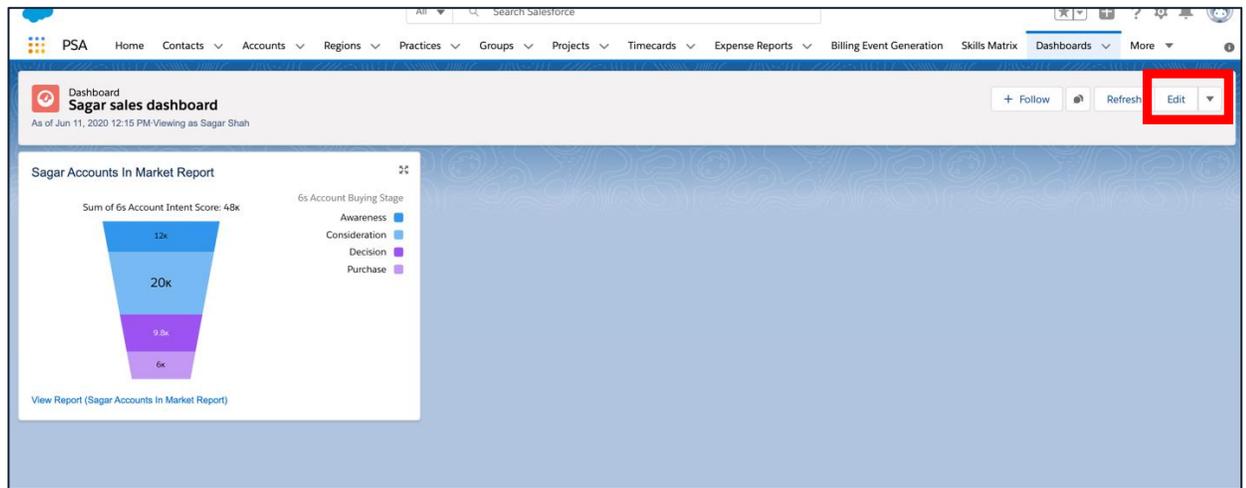


## Dashlet: Accounts with no activities for current month

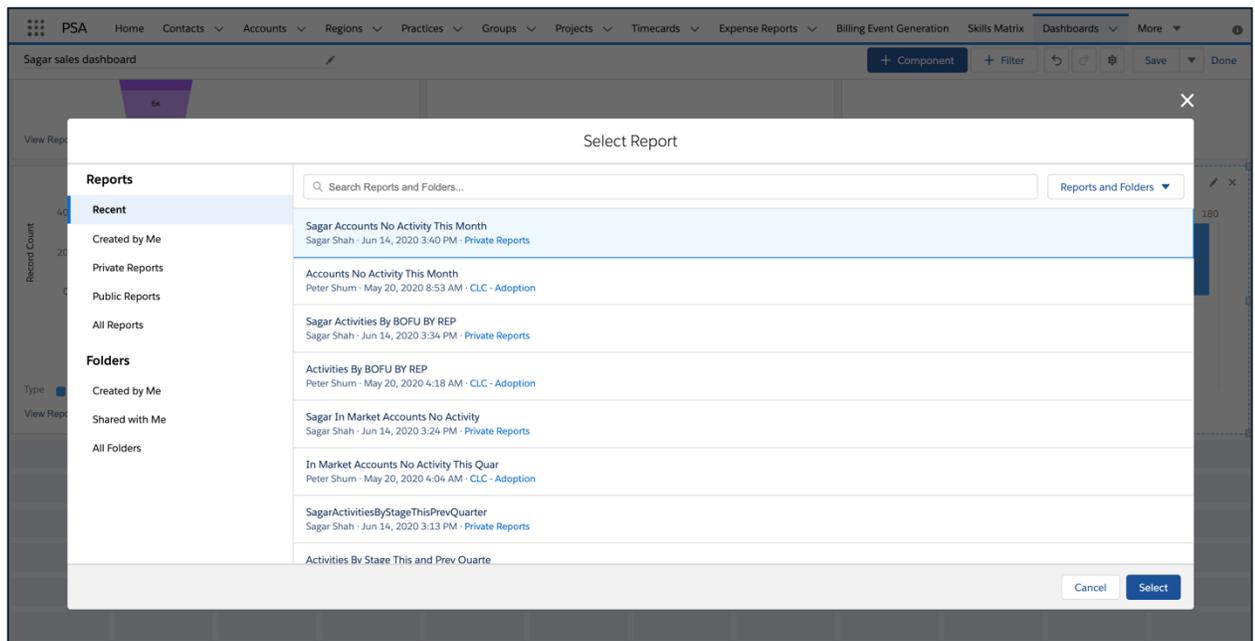
- This dashlet depicts the accounts which did not have any activities associated with them

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



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



### 3) Add this new report to the dashboard

The screenshot shows the 'Add Component' dialog box in the 6sense dashboard. The dialog is titled 'Add Component' and is used to add a new report to the dashboard. The report selected is 'Sagar Accounts No Activity This Month'. The dialog shows a preview of the report, which is a horizontal bar chart showing the record count for various account owners. The Y-axis is labeled 'Record Count' and ranges from 0 to 40. The X-axis is labeled 'Account Owner' and lists several account owners with their corresponding record counts. The dialog also shows options for 'Display As' (Bar Chart), 'Y-Axis' (6s Account Buying Stage), 'X-Axis' (Record Count), and 'Display Units' (Shortened Number). There are also checkboxes for 'Show Values' and 'Show Chatter Photos'.

**Report:** Sagar Accounts No Activity This Month

**Preview:** Sagar Accounts No Activity This Month

Account Owner	Record Count
Alex Muirgrove	21
Connor Keovorkian	11
Connor Moakley	9
Courtney Thompson	14
Dasha Vasilyeva	9
Derek Levine	13
Garrett Scarnaci	14
Jamie Howells	5
John Dionne	14
Jorge Lopez	6

**Sagar sales dashboard**

**Sagar Activities By BOFU BY REP**

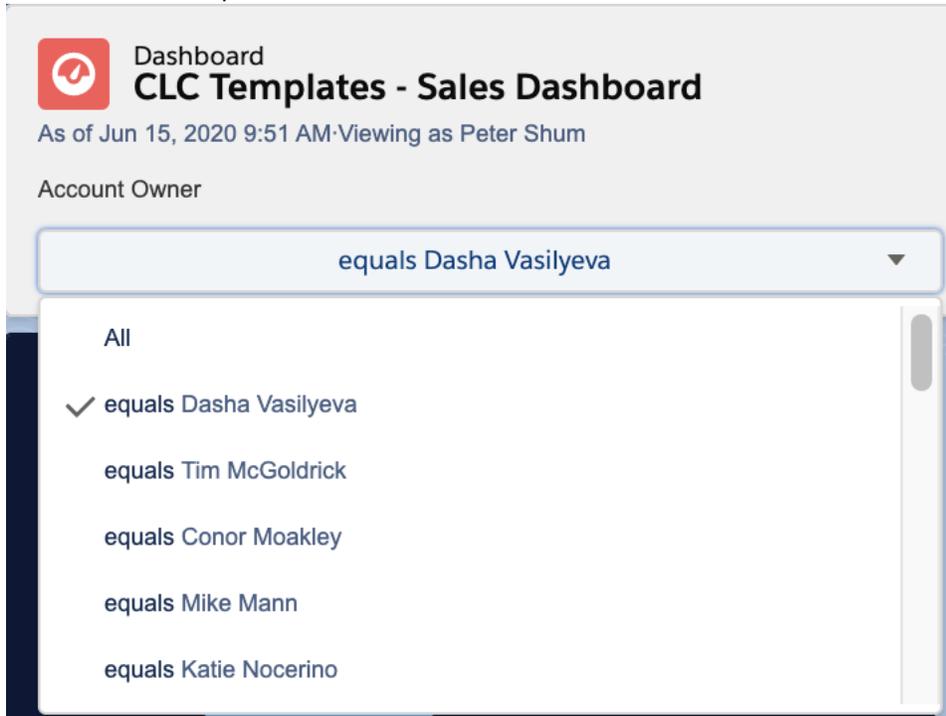
Decision	Assigned	Sum of 6s Account Intent Score
Courtney Thompson	Courtney Thompson	319
Derek Levine	Derek Levine	176
Ernest Owasu	Ernest Owasu	181
Juline Lamuga	Juline Lamuga	229
Kyle Hodgkins	Kyle Hodgkins	152
Leigh Kindley	Leigh Kindley	147
Michael Conn	Michael Conn	168
Rachel Doble	Rachel Doble	82
Shawn Allaire	Shawn Allaire	147
Susan Peterson Sch...	Susan Peterson Schatschneider	168
Alex Bohonquez	Alex Bohonquez	87
Alex Paine	Alex Paine	88
Allie Gollner	Allie Gollner	77
Courtney Thompson	Courtney Thompson	98
Ernest Owasu	Ernest Owasu	72
Juline Lamuga	Juline Lamuga	95
Kory Geyer	Kory Geyer	99
Leigh Kindley	Leigh Kindley	194
Mark Ebert	Mark Ebert	360
Maura Brady	Maura Brady	281
Michael Conn	Michael Conn	88
Rachel Doble	Rachel Doble	194

**Sagar Accounts No Activity This Month**

Account Owner	Record Count
Alex Muirgrove	21
Connor Keovorkian	11
Connor Moakley	9
Courtney Thompson	14
Dasha Vasilyeva	9
Derek Levine	13
Garrett Scarnaci	14
Jamie Howells	5
John Dionne	14
Jorge Lopez	6
Juline Lamuga	6
Karsten Wethington	4
Kate Nocero	11
Kory Geyer	5
Kyle Gutzler	15
Kyle Hodgkins	20
Leigh Kindley	13
Mason Colombo	19
Melissa Taylor	7
Nick Ryan	25
Oliver Ronick	16
Rob Matorano	23
Sara Akhail	14

## Dashboard Filtering

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



### STEPS:

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



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”

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## Add Filter

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\*Field

🔍

- 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