Your sales reporting guide

Salesforce · Built with Datapipe

Start with the overview. Follow the rep, activity or lead source behind a change.

Explore the report

01 Overview
Won revenue, win rate, deal size, sales cycle, new pipeline and activities at a glance.

02 Reps
Won revenue, win rate, deal size and new opportunities for each owner.

03 Activities
Completed calls, emails, meetings and tasks by day and by rep.

04 Won and lost
Results by lead source and opportunity type.

Use your own data

1 Add Salesforce in Datapipe.
Sign in as a user who can see your team's records.

2 Choose this template in Reports.
Datapipe reads your opportunities, tasks and events and fills the pages.

3 Open your Data Studio copy.
Datapipe keeps the numbers up to date.

Read the numbers correctly

Win rate is opportunities closed won divided by all opportunities closed won or lost. Average deal size is won revenue divided by deals won, and sales cycle is the average days from created to close for won deals.

Rates use totals, not averages of each rep's figures. Closed deals count on their close date, new opportunities on the day they were created, and activities on the day they were completed or started.

Datapipe reads only what the connected Salesforce user can see. Use the date control to compare complete periods.

Sample data · A B2B software sales team's Salesforce organization, 16 August–13 November 2026

Sales performance

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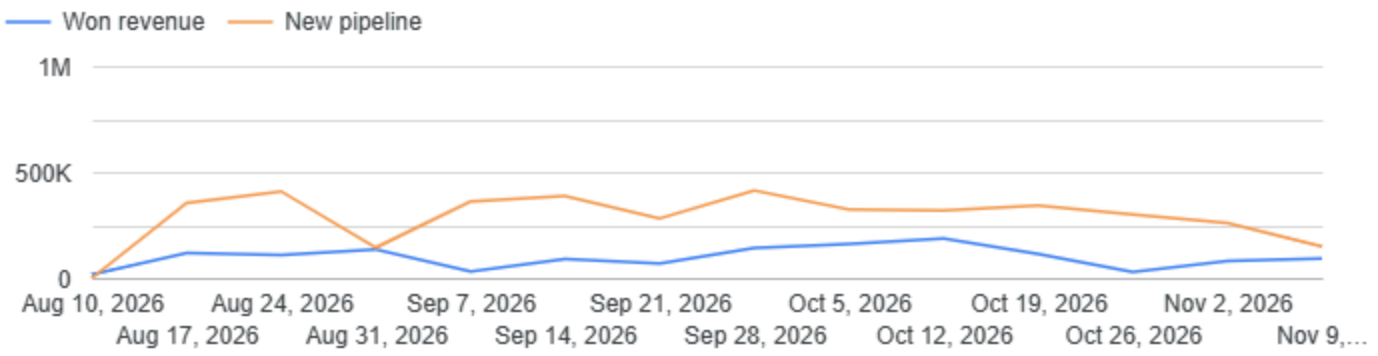
Data status

Aug 16, 2026 - Nov 13, 2026

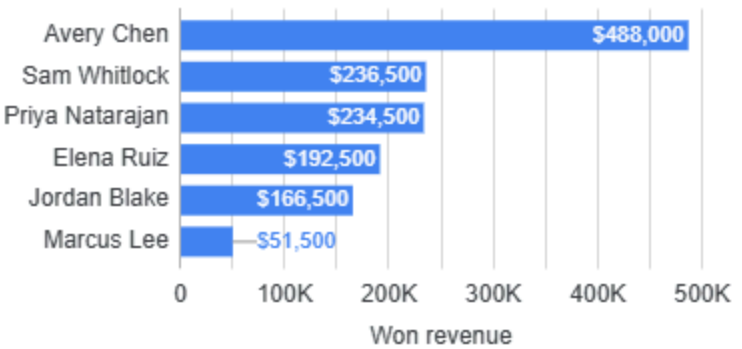
Won revenue	Win rate	Deals won	Average deal size
$1,369,500	40.52%	62	$22,089
▲ 7.9% from previous 90 days	▼ -0.61% from previous 90 days	▲ 6.9% from previous 90 days	▲ 1.0% from previous 90 days

New opportunities	New pipeline	Sales cycle (days)	Activities
181	$4,037,000	51.7	10,247
▲ 38.2% from previous 90 days	▲ 24.5% from previous 90 days	▲ 0.98 from previous 90 days	▲ 12.7% from previous 90 days

Won revenue and new pipeline by week



Won revenue by rep



Recently closed opportunities

	Date ▾	Opportunity	Owner	Outcome	Won revenue	Lost amount
1.	Nov 13, 2026	Bayside Dental – New Busi…	Priya Natarajan	Lost	$0	$51,000
2.	Nov 13, 2026	Cobalt Manufacturing – Ne…	Elena Ruiz	Lost	$0	$17,000
3.	Nov 13, 2026	Silverline Telecom – New B…	Jordan Blake	Lost	$0	$17,000
4.	Nov 12, 2026	Tidewater Shipping – Existin…	Priya Natarajan	Won	$16,500	$0
5.	Nov 12, 2026	Ironwood Construction – Exi…	Priya Natarajan	Won	$22,500	$0
6.	Nov 11, 2026	Harborview Hotels – New B…	Jordan Blake	Lost	$0	$36,000
7.	Nov 10, 2026	Westbrook University – New…	Avery Chen	Lost	$0	$22,500
8.	Nov 10, 2026	Highland Motors – New Bus…	Avery Chen	Lost	$0	$27,000

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Won and lost opportunities count on their close date; new opportunities on the day they were created. Win rate is won ÷ (won + lost), average deal size is won revenue ÷ deals won and sales cycle is days from created to close for won deals, all from totals. Activities are completed calls, emails and tasks plus meetings that have started. Comparisons use equal periods.

Reps

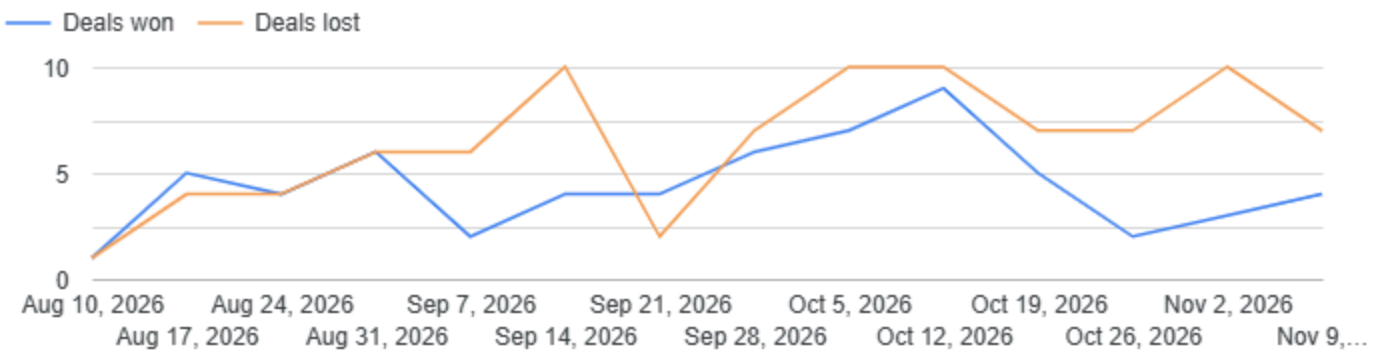
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Data status | Owner | Aug 16, 2026 - Nov 13, 2026

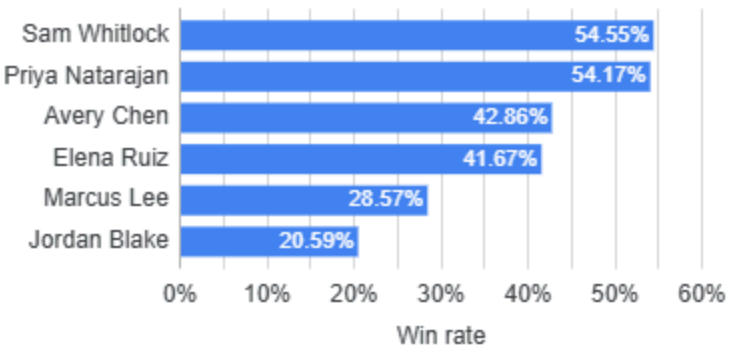
Won revenue	Win rate	Deals won	Deals lost
$1,369,500	40.52%	62	91
7.9% from previous 90 days	-0.61% from previous 90 days	6.9% from previous 90 days	9.6% from previous 90 days

Average deal size	New opportunities	New pipeline	Sales cycle (days)
$22,089	181	$4,037,000	51.7
1.0% from previous 90 days	38.2% from previous 90 days	24.5% from previous 90 days	0.98 from previous 90 days

Deals won and lost by week



Win rate by rep



Rep leaderboard

	Owner	Won revenue	Deals won	Average deal size	Deals lost	Win rate	Sales cycle (days)	New opportunities	New pipeline
1.	Avery Chen	$488,000	18	$27,111.11	24	42.86%	64.56	42	$1,060,500
2.	Sam Whitlock	$236,500	12	$19,708.33	10	54.55%	55.33	35	$885,000
3.	Priya Natarajan	$234,500	13	$18,038.46	11	54.17%	36.85	38	$756,500
4.	Elena Ruiz	$192,500	10	$19,250	14	41.67%	34	30	$597,000
5.	Jordan Blake	$166,500	7	$23,785.71	27	20.59%	53	36	$738,000
6.	Marcus Lee	$51,500	2	$25,750	5	28.57%	95.5	0	$0

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Each opportunity counts for its current owner. Won and lost deals count on their close date and new opportunities on the day they were created. Win rate, average deal size and sales cycle are worked out from each rep's totals. Pick an owner at the top to see one rep.

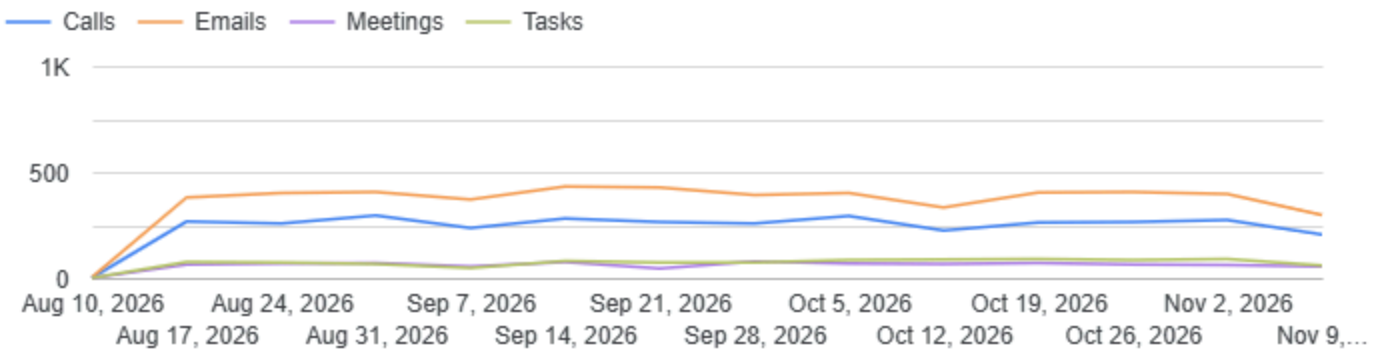
Activities

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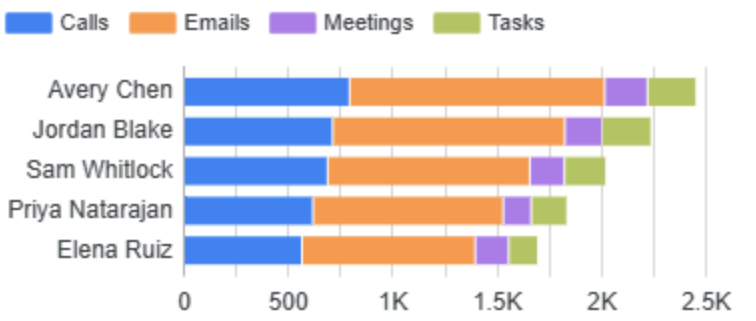
Data status | Owner | Aug 16, 2026 - Nov 13, 2026

Activities	Calls	Emails	Meetings
10,247	3,376	5,043	843
↑ 12.7% from previous 90 days	↑ 11.2% from previous 90 days	↑ 14.6% from previous 90 days	↑ 13.9% from previous 90 days

Calls, emails, meetings and tasks by week



Activities by rep



	Date	Activities	Calls	Emails	Meetings	Tasks
1.	Nov 13, 2026	162	49	85	12	16
2.	Nov 12, 2026	155	52	74	13	16
3.	Nov 11, 2026	39	14	15	5	5
4.	Nov 10, 2026	121	40	60	12	9
5.	Nov 9, 2026	141	51	63	13	14
6.	Nov 8, 2026	11	3	6	0	2
7.	Nov 7, 2026	4	0	4	0	0
8.	Nov 6, 2026	163	61	73	8	21
9.	Nov 5, 2026	172	71	73	8	20
10.	Nov 4, 2026	154	42	77	11	24

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Completed tasks count on the day they were completed: calls are tasks with the Call subtype, emails are logged emails and list emails, and the rest are tasks. Meetings are calendar events, counted on the day they start once they have started. Invitee copies of shared meetings and recurring-series records are left out. Days use your Salesforce organization's time zone.

Won and lost

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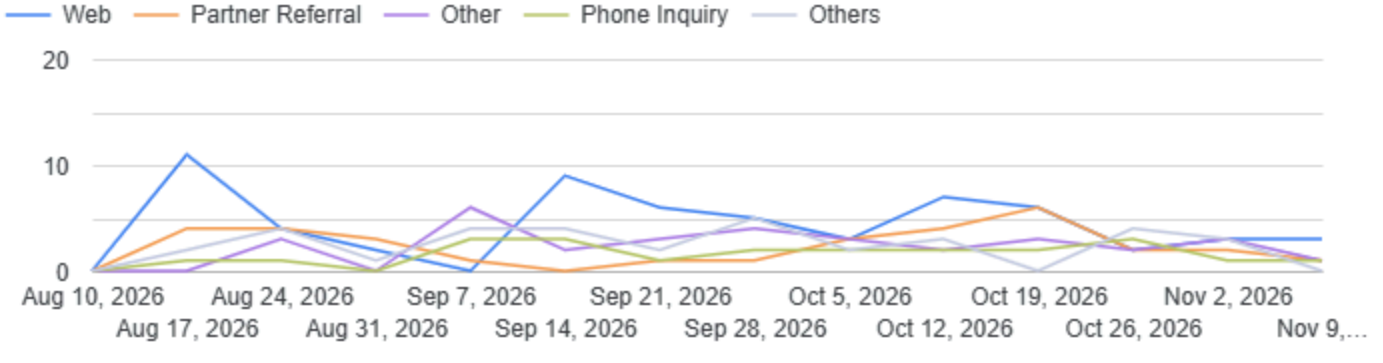
Lead source

Aug 16, 2026 - Nov 13, 2026

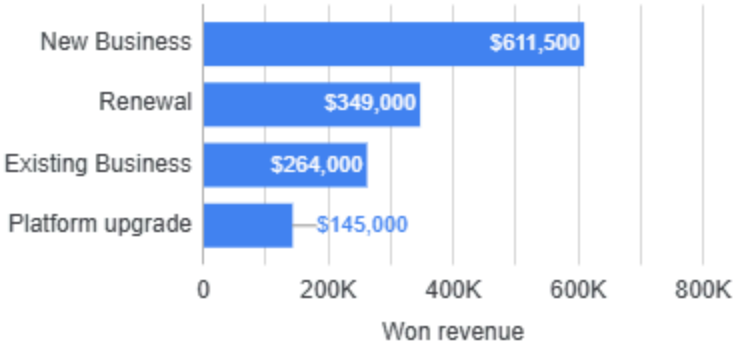
Won revenue
$1,369,500
7.9% from previous 90 days

Win rate
40.52%
-0.61% from previous 90 days

New opportunities by lead source, by week



Won revenue by opportunity type



By lead source

	Lead source	Won revenue ▾	Deals won	Deals lost	Win rate	Average deal size	New opportunities	New pipeline
1.	Other	$433,500	21	11	65.63%	$20,642.86	32	$747,000
2.	Web	$266,000	13	30	30.23%	$20,461.54	61	$1,421,000
3.	Partner Referral	$246,500	9	18	33.33%	$27,388.89	32	$684,000
4.	Phone Inquiry	$194,500	8	14	36.36%	$24,312.5	22	$455,500
5.	Purchased List	$94,500	3	5	37.5%	$31,500	11	$246,000
6.	Trade Show	$67,500	4	7	36.36%	$16,875	10	$222,500
7.	Not recorded	$67,000	4	6	40%	$16,750	13	$261,000

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Lead source and opportunity type are each opportunity's current values in Salesforce; opportunities without a lead source show as Not recorded. Won revenue and win rate count deals on their close date, and new opportunities and new pipeline on the day they were created.