Your Salesforce reporting guide

Salesforce · Built with Datapipe

Start with the overview. Then review opportunities won and lost, and finish with the open pipeline.

Explore the report

01 Overview
Won amount, win rate and the open pipeline by stage.

02 Won & lost
Opportunities won and lost by week and owner, with details.

03 Open pipeline
Open opportunities by stage, weighted amount and past-due opportunities.

Use your own data

1 Add Salesforce as a data source in Datapipe.
Choose your project and sign in to your Salesforce organization.

2 Create this dashboard.
Authorize Google Sheets separately when prompted.

3 Save your private Data Studio copy.
Datapipe refreshes the same workbook.

Read the numbers correctly

Won and lost opportunities use their close date. Amounts stay in each opportunity's currency.

Win rate is won opportunities divided by won and lost opportunities closed in the selected dates.

Open pipeline is your current pipeline when the data was read. Weighted amount is the amount times the opportunity's probability. Owner is the opportunity owner.

Sample data

Sales overview

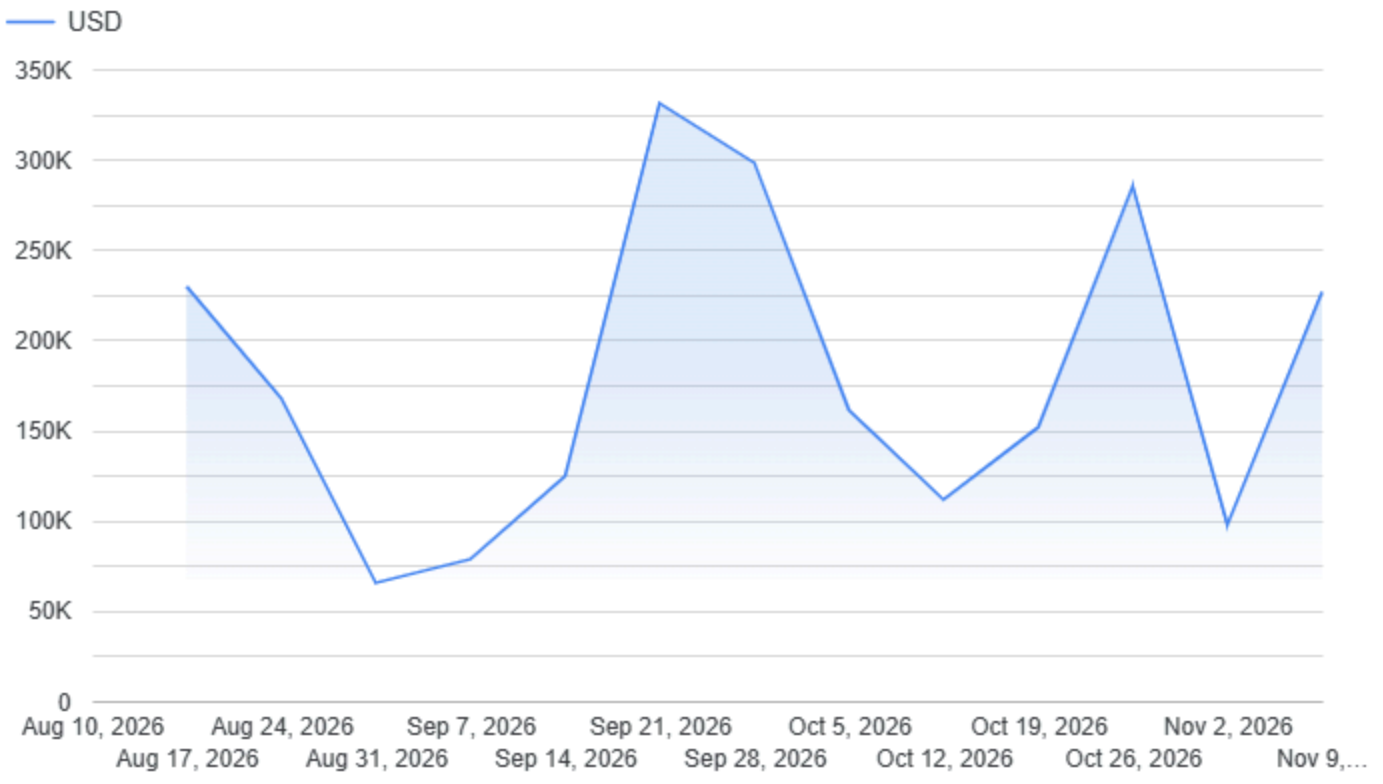
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Currency: USD (1)

Aug 16, 2026 - Nov 13, 202

Won amount	Win rate	Open pipeline	Weighted pipeline
2,327,500	40.98%	2,381,000	1,118,875

Won amount by close week



Open pipeline by stage



Closed opportunities by owner

	Owner	Closed	Won	Lost	Win rate	Won amount
1.	Avery Chen	75	37	38	49.33%	957,500
2.	Sam Whitlock	52	22	30	42.31%	522,000
3.	Elena Ruiz	46	18	28	39.13%	348,500
4.	Priya Natarajan	30	12	18	40%	298,000
5.	Jordan Blake	41	11	30	26.83%	201,500

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Won amount and win rate use opportunities closed in the selected dates. Open pipeline is your current pipeline; weighted amount uses each opportunity's probability.

Won and lost opportunities

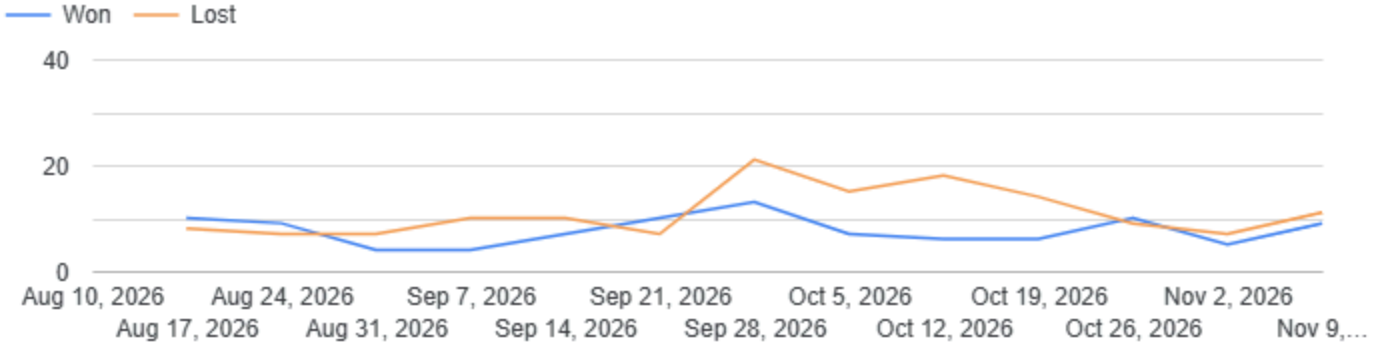
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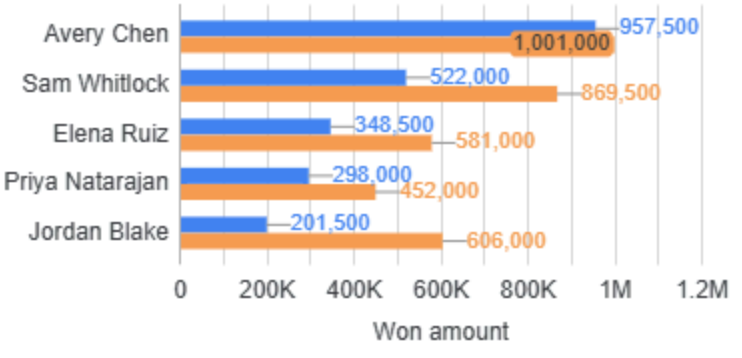
Aug 16, 2026 - Nov 13, 20:

Won opportunities	Average won amount	Lost opportunities	Average days to close (won)
100	23,275	144	53

Won and lost opportunities by week



Won and lost amount by owner



Closed opportunity details

	Opportunity	Owner	Outcome	Close date ▾	ID	Amount	Days to close
1.	Quantum Freight – New Business	Avery Chen	Won	Nov 13, 2026	006A0000005152AAA	19,500	85
2.	Cobalt Manufacturing – Platform upgrade	Avery Chen	Won	Nov 13, 2026	006A0000005109AAA	26,000	54
3.	Fairview Schools – Renewal	Jordan Blake	Won	Nov 13, 2026	006A0000005242AAA	12,000	45
4.	Redwood Financial – Renewal	Priya Natarajan	Won	Nov 13, 2026	006A0000005303AAA	23,000	17
5.	Redwood Financial – New Business	Priya Natarajan	Lost	Nov 13, 2026	006A0000005239AAA	50,500	82
6.	Keystone Credit Union – New Business	Jordan Blake	Lost	Nov 13, 2026	006A0000005133AAA	17,000	60
7.	Pinecrest Foods – Expansion	Sam Whitlock	Lost	Nov 12, 2026	006A0000005321AAA	9,500	43
8.	Westbrook University – New Business	Sam Whitlock	Won	Nov 12, 2026	006A0000005290AAA	47,500	59
9.	Northwind Traders – New Business	Elena Ruiz	Lost	Nov 11, 2026	006A0000005115AAA	17,500	83
10.	Yellowstone Outdoor – Renewal	Sam Whitlock	Won	Nov 11, 2026	006A0000005121AAA	20,500	35

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Opportunities closed in the selected dates, won or lost. Days to close runs from the opportunity's created date to its close date. Amounts stay in each opportunity's currency.

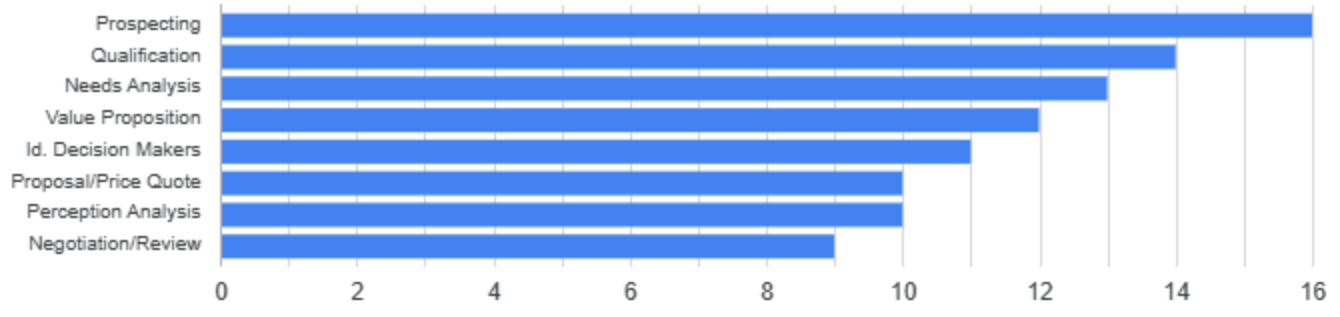
Open pipeline

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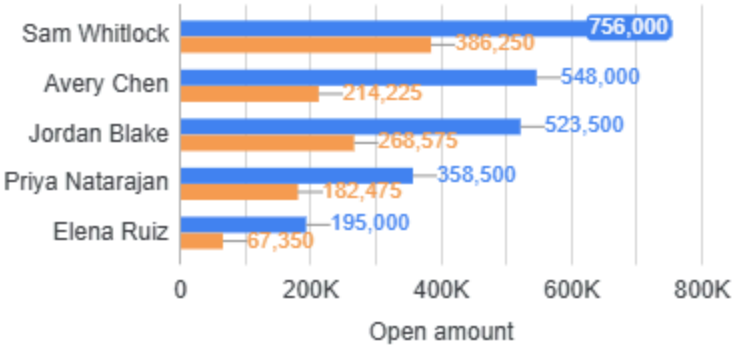
Currency: USD (1)

Open opportunities	Open amount	Weighted amount	Past-due opportunities
95	2,381,000	1,118,875	10

Open opportunities by stage



Open amount by owner



Open opportunity details

	Opportunity	Owner	Stage	Close date	ID	Amount ▾	Weighted amount	Age (days)
1.	Redwood Financial – New Business	Sam Whitlock	Negotiation/Review	Dec 30, 2026	006A00000005431AAA	72,500	65,250	92
2.	Silverline Telecom – Platform upgrade	Jordan Blake	Proposal/Price Quote	Nov 28, 2026	006A00000005422AAA	61,000	45,750	55
3.	Yellowstone Outdoor – New Business	Jordan Blake	Prospecting	Feb 24, 2027	006A00000005345AAA	54,000	5,400	7
4.	Evergreen Utilities – New Business	Avery Chen	Prospecting	Nov 8, 2026	006A00000005355AAA	51,000	5,100	28
5.	Driftwood Resorts – Platform upgrade	Jordan Blake	Value Proposition	Jan 21, 2027	006A00000005396AAA	49,500	29,700	53
6.	Evergreen Utilities – New Business	Sam Whitlock	Perception Analysis	Nov 22, 2026	006A00000005419AAA	48,000	33,600	50
7.	Vertex Software – New Business	Sam Whitlock	Qualification	Nov 19, 2026	006A00000005363AAA	46,500	4,650	27
8.	Redwood Financial – Platform upgrade	Sam Whitlock	Qualification	Nov 10, 2026	006A00000005367AAA	45,500	4,550	36
9.	Quantum Freight – New Business	Jordan Blake	Id. Decision Makers	Nov 18, 2026	006A00000005408AAA	45,000	27,000	60
10.	Vertex Software – New Business	Avery Chen	Proposal/Price Quote	Jan 11, 2027	006A00000005427AAA	44,000	33,000	39

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Your current open pipeline when the data was read. Weighted amount is the amount times the opportunity's probability. Past due means the close date has passed.