

Dashboards



“We smiled for a month when we first saw the real-time dashboards and reports. They mean we can respond quickly to issues, make service improvements, and maximize the use of resources.”

— Siminn

Check the Health of Your Entire Business in a Single Scorecard

Imagine the power of having easy, instant access to the key performance drivers and real-time analytics you need to steer your business to success. With Salesforce, that power is as close as a Web browser.

Dashboards provide a single, corporate scorecard for an at-a-glance overview of your entire business, covering sales, marketing, service, and other departments. No more hunting around for information from multiple reports and sources. Dashboards give your organization a complete picture of the health of your business in a one-page snapshot featuring benchmarks and critical corporate metrics and data.

Up-to-the-Minute Information with One Click

Dashboards put an end to outdated data. With one-click dashboard refreshment, you'll know exactly what's happening in your business, right now. Because nothing is more powerful than real-time business data delivered to you as quickly as your mouse can click.

An Early Warning System for Potential Problems

With dashboards, you'll easily spot potential business problems. Easy-to-use data visualization tools enable you to identify trends using charts, tables, and other graphics. Drill-down capabilities allow you to dig into your underlying data and leverage Salesforce's powerful analytics tool to build trend reports, matrix reports, and identify root causes of any weakness in your business.

A Customized Dashboard for Every Role

Different executives and managers care about different things. Because one size does *not* fit all, you can set up multiple, customized dashboards so everyone gets exactly the information they need for their roles. You can highlight critical information and exceptions for quick identification. Plus, you can easily and securely distribute dashboards to select people in your organization when you need to share data.

A Consolidated View Across All Your Systems

Thanks to the integration capabilities of the Salesforce application's underlying Force.com platform, you can integrate dashboards with third-party analytics for a consolidated view of Salesforce data as well as data from virtually any other system in the enterprise.

Getting Started

A scorecard of key performance indicators from across your business is just a click away with Salesforce's dashboards. Dashboards are free for Salesforce Unlimited Edition, Enterprise Edition, and Professional Edition customers and are accessible via a dashboards tab within the Salesforce application.

“We have dashboards for every part of our business—marketing, sales, and support. It is much easier to keep a handle on business performance when you can see so many key metrics graphically and on a single page. Plus, it's easy to make changes to them, which is essential for a growing startup where things change frequently.”

— ServePath

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

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