Sales Pipeline Tracking and Reporting

Template Set Getting Started Guide

The Sales Pipeline Tracking and Reporting template set provides sales leadership with visibility into the sales pipeline across your organization.

smartsheet.com

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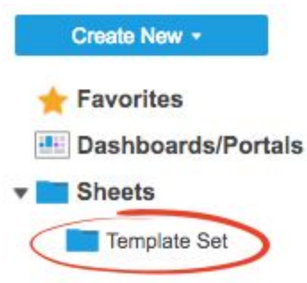
REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here] to see a list of discontinued plans.

Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[Sales Pipeline Tracking and Reporting Template Set]

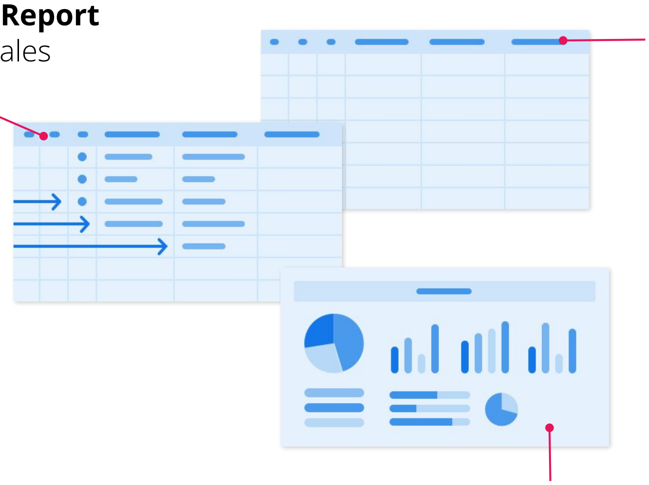


What's Included in the Set

With the Sales Pipeline Tracking and Reporting template set, leadership will gain visibility and glean critical insights into the sales pipeline across your organization.

Current Opportunities Report
A running log of current sales opportunities.

Sales Pipeline Sheet
One location to manage and track all sales prospects.



Sales Pipeline Overview Dashboard
A dashboard that summarizes key sales metrics in real-time.

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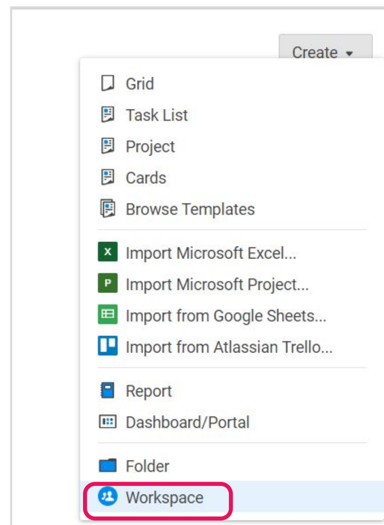
Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.



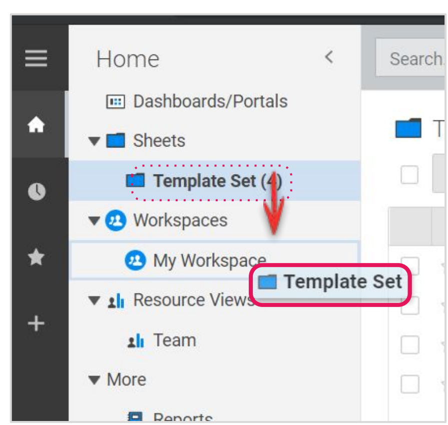
Learn more:

Workspaces Overview, Workspace Sharing, Home Tab

Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.



Learn more:

Manage Items in a Workspace (Add, Move, Remove)

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Customize

Step 3:

Setup the Sales Pipeline Overview Dashboard

The Sales Pipeline Overview dashboard centralizes all of the elements of your pipeline and summarizes key metrics in a real-time view. Dashboards consist of different widgets that pull in live information from other sheets and reports.

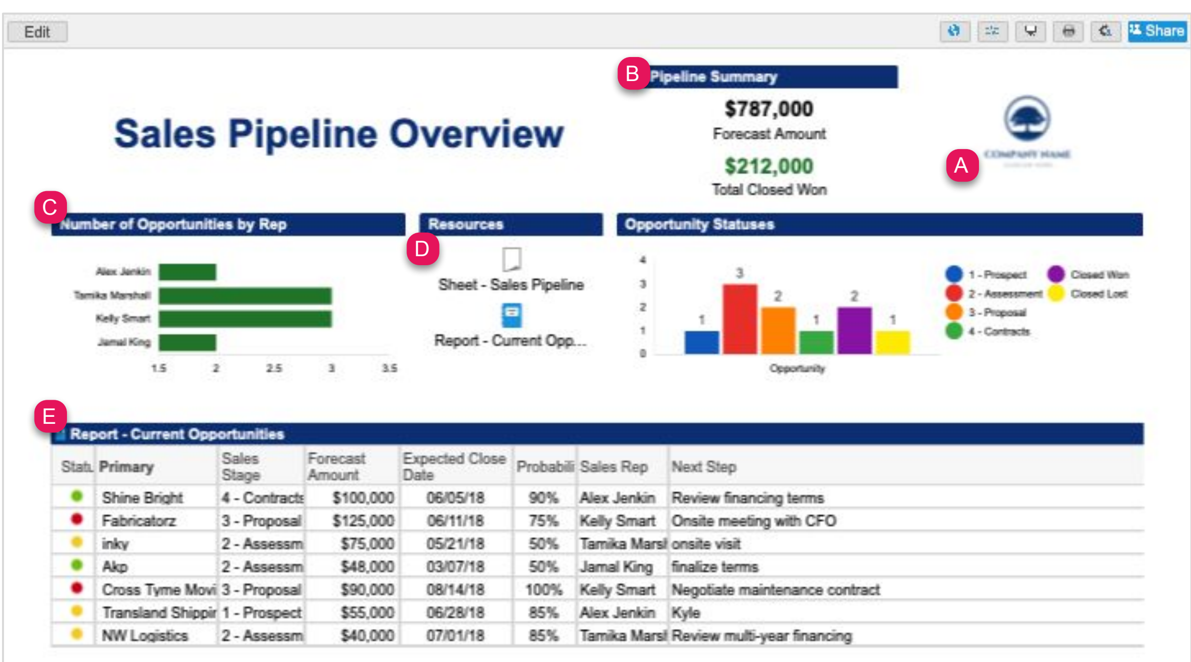
A. Replace the logo placeholder with your own logo in the *Image* widget.

B. The Pipeline Summary is a *Metric* widget that pulls in live values from your Sales Pipeline sheet.

C. Number of Opportunities by Rep and Opportunity Statuses are *Chart* widgets that create a bar chart and a column chart from the formulas in the metric section of your Sales Pipeline sheet.

D. Resources is a *Shortcut* widget with links to your other sheets and reports. Feel free to add a shortcut to the URL for the sales opportunity form and other documents and resources.

E. Current Opportunities is a *Report* widget that displays your live report in the dashboard.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

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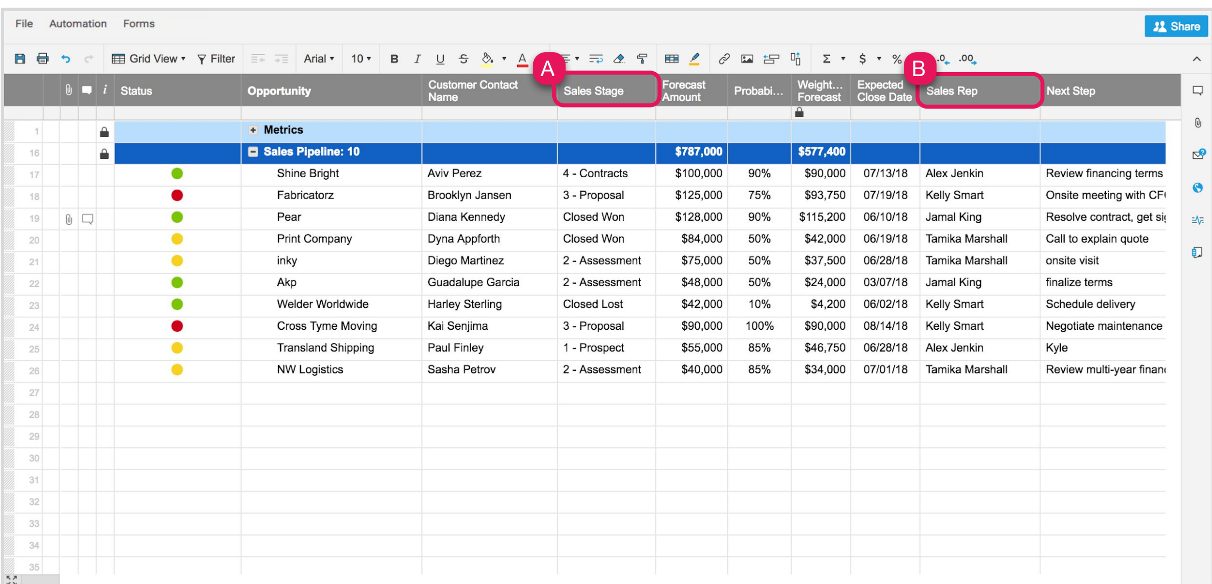
Step 4:

Setup the Sales Pipeline Sheet

Track all of your sales opportunities in one location on the Sales Pipeline sheet.

A. Add or rename columns to best fit your organization's needs. Right-click on the *Sales Stage* column and click *Edit Column Properties* to customize the stages in the dropdown menu. Repeat this step to modify the Status and Probability dropdown lists.

B. Both Customer Contact Name and Sales Rep are contact list columns that track the name and associated email address.



	Status	Opportunity	Customer Contact Name	Sales Stage	Forecast Amount	Probabi…	Weight… Forecast	Expected Close Date	Sales Rep	Next Step
1		Metrics								
16		Sales Pipeline: 10			$787,000		$577,400			
17		Shine Bright	Aviv Perez	4 - Contracts	$100,000	90%	$90,000	07/13/18	Alex Jenkin	Review financing terms
18		Fabricatorz	Brooklyn Jansen	3 - Proposal	$125,000	75%	$93,750	07/19/18	Kelly Smart	Onsite meeting with CF
19		Pear	Diana Kennedy	Closed Won	$128,000	90%	$115,200	06/10/18	Jamal King	Resolve contract, get si
20		Print Company	Dyna Appforth	Closed Won	$84,000	50%	$42,000	06/19/18	Tamika Marshall	Call to explain quote
21		inky	Diego Martinez	2 - Assessment	$75,000	50%	$37,500	06/28/18	Tamika Marshall	onsite visit
22		Akp	Guadalupe Garcia	2 - Assessment	$48,000	50%	$24,000	03/07/18	Jamal King	finalize terms
23		Welder Worldwide	Harley Sterling	Closed Lost	$42,000	10%	$4,200	06/02/18	Kelly Smart	Schedule delivery
24		Cross Tyme Moving	Kai Senjima	3 - Proposal	$90,000	100%	$90,000	08/14/18	Kelly Smart	Negotiate maintenance
25		Transland Shipping	Paul Finley	1 - Prospect	$55,000	85%	$46,750	06/28/18	Alex Jenkin	Kyle
26		NW Logistics	Sasha Petrov	2 - Assessment	$40,000	85%	$34,000	07/01/18	Tamika Marshall	Review multi-year finan
27										
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35										

Learn more:

[Sheets](), [Contact List Column]()

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Step 5:

Setup the Sales Pipeline Sheet

The Sales Opportunity form is how sales reps submit information about leads to the Sales Pipeline sheet.

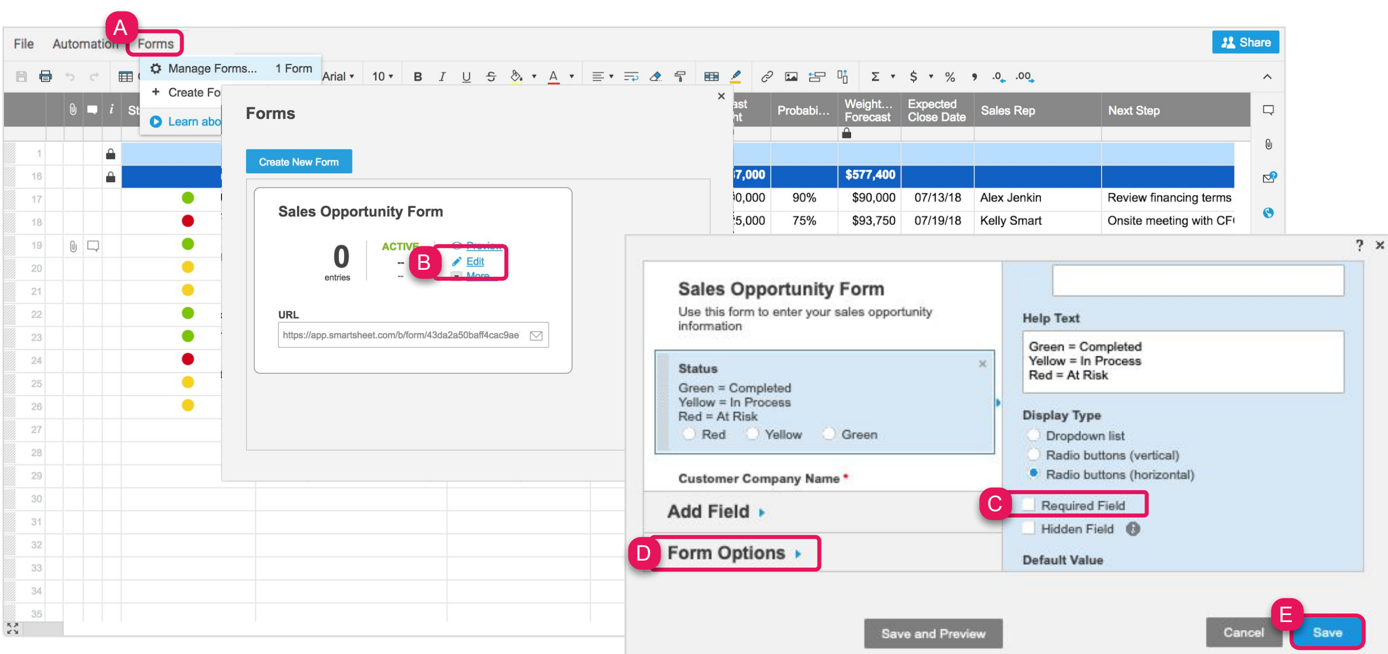
A. In the Sales Pipeline sheet, click on *Forms* in the top menu to customize the submission form.

B. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify Form Options.

C. Mark fields as required that you want to ensure sales reps complete.

D. Set your form to be filled out only by a *registered Smartsheet user* to limit the form.

E. Click *Save* to close the form builder and copy and save the URL displayed. Email the URL for the form to the sales rep so they can easily submit opportunities to the Sales Pipeline sheet from their mobile device or other desktop browser.



Learn more:

[Forms](), [Edit Existing Fields]()

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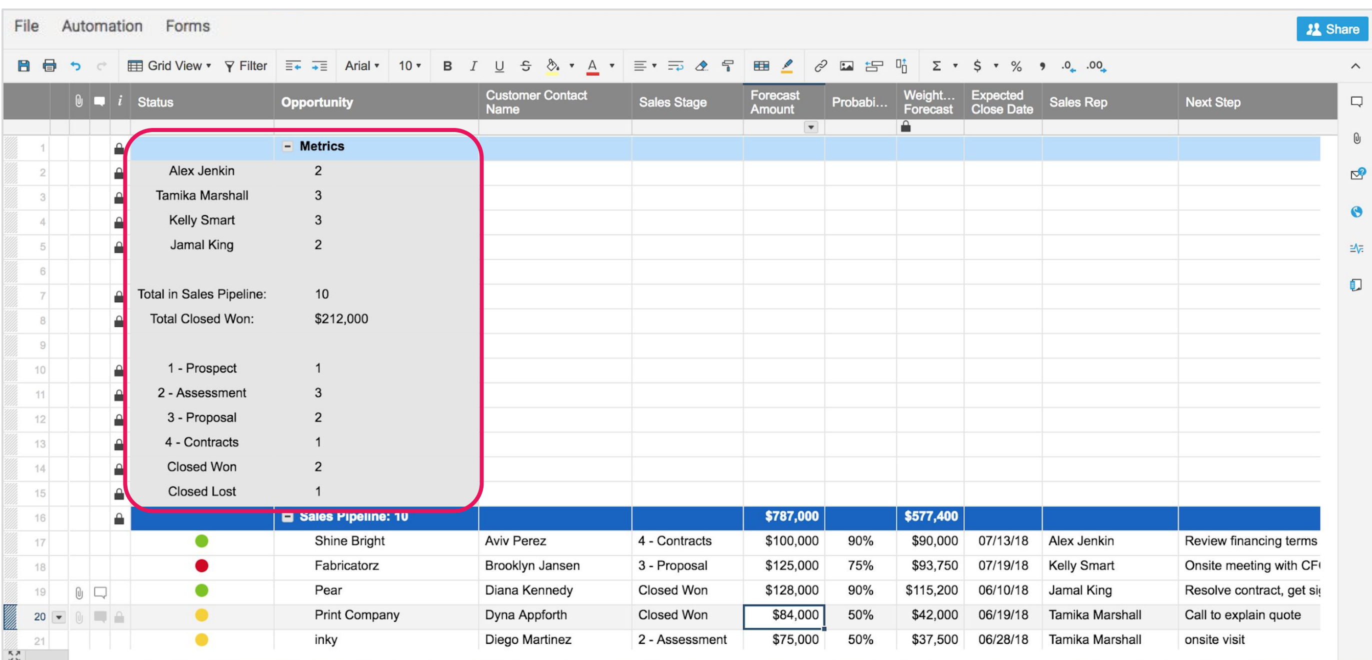
Step 6:

Understand the Metrics on the Sales Pipeline Sheet

The metrics hierarchy at the top of your sheet consists of several locked rows with formulas in them that are tracking overall metrics across your pipeline. There are also a few sum children functions in row 16 of the Opportunity, Forecast Amount, and Weighted Forecast columns. These formula values are then surfaced in metrics and charts on your Sales Pipeline Overview dashboard. Before deleting or editing rows in this sheet look at how they work in the dashboard.



Learn more:

[Create and Edit Formulas in Smartsheet](), [Lock or Unlock Columns and Rows]()

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Step 7:

Sheet Bonus: View or Edit Your Project Summary Data

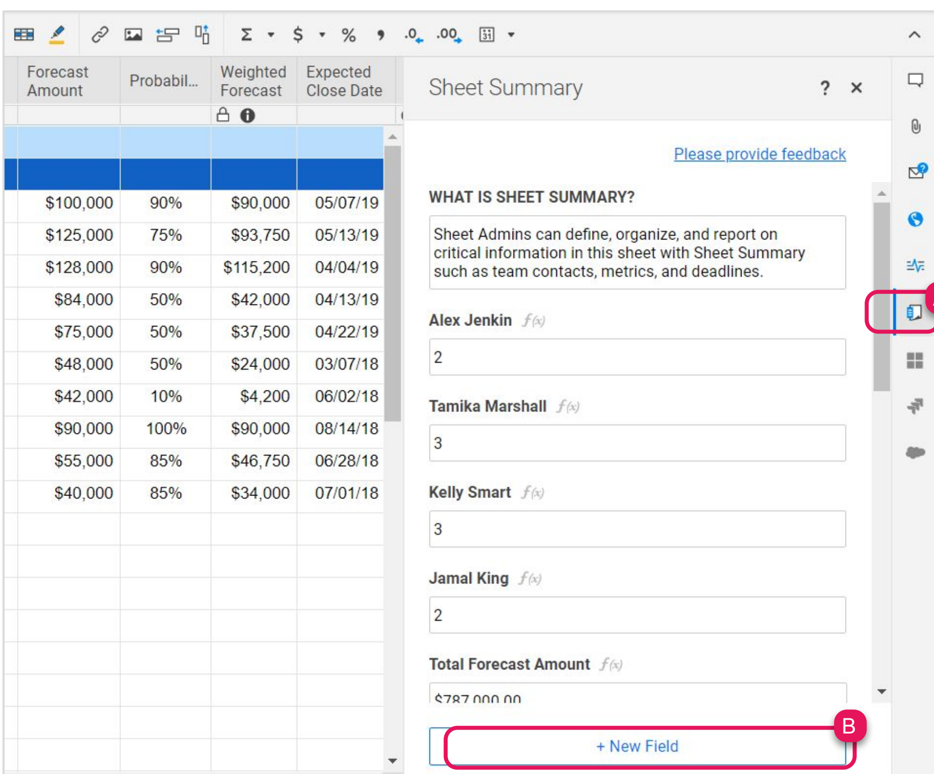
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Sales Pipeline sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of how many sales per team member, forecasted and total sales closed, and a breakdown of figures by sales status. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.



Learn more:

Define Your Work with Sheet Summary, Maximize Your Sheet Summary Usage, Create a Portfolio View with a Summary Report

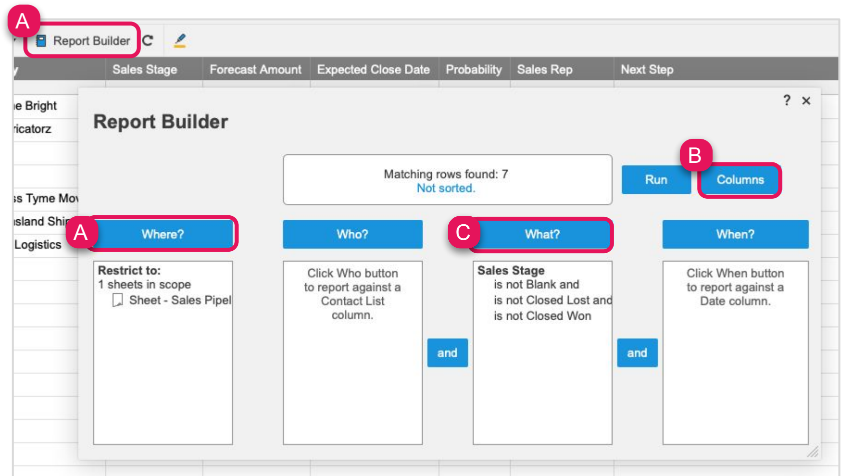
Step 8:
Use the Current Opportunities Report

The Current Opportunities report allows you to see all of the sales opportunities currently in play.

A. Open the report, click on the *Report Builder,* and select the *Sales Pipeline sheet* in the *Where?* field.

B. Using the *Columns* button, select all of the columns you would like to display in the report, including the *Sales Stage* column.

C. In the *What?* field, filter the report to if the *Sales Stage* is *not Blank, not Closed Lost,* and *is not Closed Won*.



Learn more:
[Report Builder]

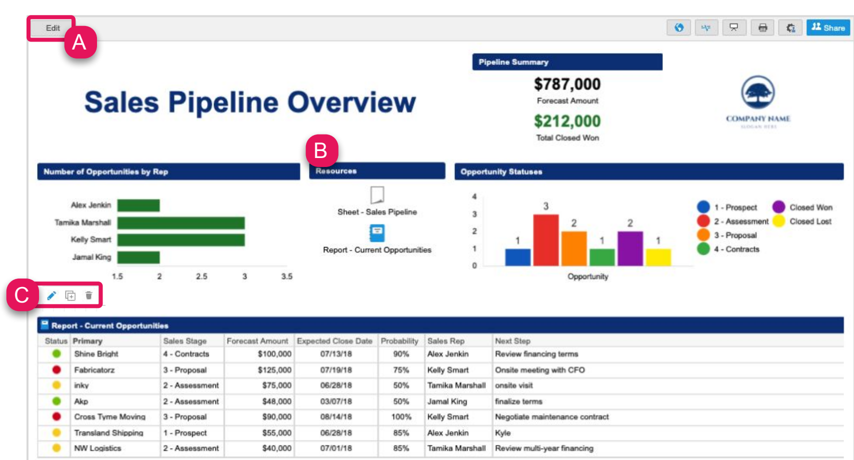
Step 9:
Customize the Dashboard

Provide a central location for your team to get updates on sales opportunities. Easily customize the dashboard to include your sales resources by editing Resources in the Shortcut widget.

A. Click *Edit*, to start editing the dashboard.

B. Hover over the Resources widget and a widget options menu will appear at the bottom left corner.

C. Click *Edit* (pencil icon) to modify shortcuts.



Learn more:
[Make Changes to an Existing Dashboard]

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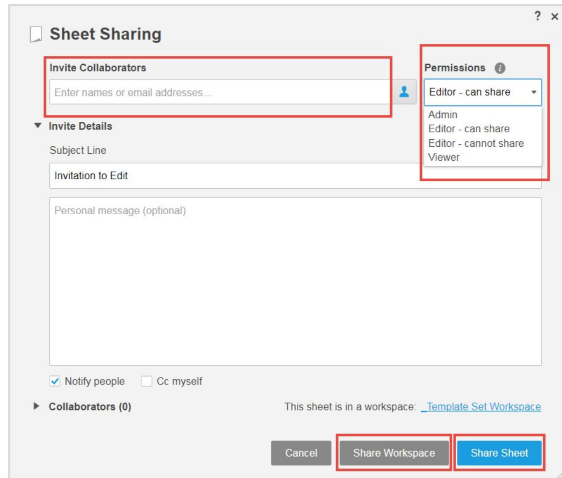
Step 10:

Share Your Sales Pipeline Tracking and Reporting Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing