

Sales Team Revenue Reports

There are several sales reports (CRM > Reports > Sales) that will help you see how much revenue your direct sales team has generated and forecast future revenue. The revenue reports are based on the value of the product interests recorded in opportunity records and / or orders placed from an opportunity through a buy now link or the "create an order" method.

Opportunity Revenue Forecast

The opportunity revenue forecast report breaks down the revenue in your active sales pipeline on a per-rep basis within a specific date range.

Potential revenue is included in this report if:

- The sales rep recorded the prospect's interests in the product /subscription program tab of an opportunity record.
- The sales rep commits to the close date forecast in the opportunity record.
- If you associate a close probability with each sales stage, this report will also calculate a weighted revenue (weighted revenue = revenue forecast x stage probability.) The weighted revenue is generally more accurate, as long as your probabilities are a close representation of reality.

You can filter this report by estimated close date, user, and commit status.

Opportunity Sales Report

The opportunity sales report shows the amount of revenue generated by your direct sales team through opportunity records. It will show you the top performers on your sales team based on number of deals, total revenue, and average revenue per deal. It also totals these numbers for all of the sales reps you include in this report. You can filter the opportunity sales report by close date or by user.

Opportunity Pipeline Summary

The opportunity pipeline summary report gives you a big picture view of revenue amounts by pipeline stage and consolidated average number of days for all

opportunities that have been in that stage. It can help you evaluate possible bottlenecks in your sales pipeline (e.g. stages where deals get stalled and revenue may be delayed) so that you can refine your sales process to insert additional marketing automation or trigger tasks to remind sales reps to follow up. This report can also include weighted revenue, based on the probabilities you associated with the stages in your pipeline.

Click a number to view details about the opportunities that are currently in that stage.
