

# Use-case: Sales tracking with Smart Tables for Confluence



## Confluence users

Individuals using Confluence as their primary collaboration platform, seeking innovative ways to enhance data management and analysis within their projects and teams.

## Sales teams

Sales teams striving for enhanced efficiency and data-driven decision-making in their pipeline management processes.

## Team leaders

Team leaders aiming to foster collaboration and transparency within their teams, enabling real-time updates and more focused decisions.

## From native to Smart & vice versa:

Say goodbye to basic tables and hello to smart tables with the Smart Tables macro. Converting your existing tables is easy and allows unlocking powerful features for filtering, editing, and calculations.

But what if you change your mind? Turning your Smart Tables back into native Confluence tables? With a few clicks, you can revert to your original format without losing any data or functionality. It's like hitting the "undo" button on your data transformation journey.

With just a few clicks, sales managers can effortlessly elevate their data from basic to dynamic. This seamless transition unlocks a whole new world of functionalities, empowering teams to perform complex data analysis and make informed decisions right within Confluence.

Table converter

(Select ALL)

Table 1

Lead Name	Lead Source	Sales Stage	Expected Revenue	Close Date	Assigned To
Lead 1	Webinar	Qualified	\$10,000	2024-10-15	John
Lead 2	Referral	Negotiation	\$15,000	2024-10-20	Emily
Lead 3	Cold Call	Prospecting	\$8,000	2024-10-25	Michael
Lead 4	Webinar	Closed Won	\$20,000	2024-11-01	Sarah
Lead 5	Advertisement	Qualified	\$12,000	2024-11-05	John
Lead 6	Referral	Prospecting	\$7,000	2024-11-10	Emily
Lead 7	Webinar	Negotiation	\$18,000	2024-11-15	Michael
Lead 8	Cold Call	Qualified	\$9,000	2024-11-20	Sarah
Lead 9	Advertisement	Negotiation	\$16,000	2024-11-25	John

1 Table to convert

Save Cancel

Convert

Table Standard Reverts to the table containing sales data for the fourth quarter

Lead Name	Lead Source	Sales Stage	Expected Revenue	Close Date	Assigned To
Lead 1	Webinar	Qualified	\$10,000	2024-10-15	John
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Lead 7	Webinar	Negotiation	\$18,000	2024-11-15	Michael
Lead 8	Cold Call	Qualified	\$9,000	2024-11-20	Sarah
Lead 9	Advertisement	Negotiation	\$16,000	2024-11-25	John

Revert to Confluence table

Settings

Revert

## Excel functions grid:

Crunching numbers shouldn't feel like pulling teeth.

Smart Tables' Excel functions make complex calculations as easy as pie. Imagine you're a sales operations manager analyzing quarterly sales performance. With Smart Tables, you can use Excel functions like SUM, AVERAGE, and COUNTIF directly within Confluence to calculate total revenue, average deal size, or lead conversion rates, all without breaking a single sweat.

our targets before the year ends. This report will provide a comprehensive overview of our sales performance, including revenue generated, leads acquired, and sales pipeline analysis for the X product.

**Table Content:** Below is the table containing sales data for the fourth quarter:

	A	B	C	D	E	F
	Lead Name	Lead Source	Sales Stage	Expected Revenue	Close Date	Assigned To
10	Lead 10	Webinar	Closed Won	\$22,000	2024-12-01	Emily
11	Lead 11	Referral	Prospecting	\$11,000	2024-12-05	Michael
12	Lead 12	Cold Call	Qualified	\$14,000	2024-12-10	Sarah
13	Lead 13	Webinar	Negotiation	\$25,000	2024-12-15	John
14	Lead 14					
15	Lead 15					
16	15			\$10,000		

**Functions**

A16 | COUNTA(A1:A15)

## Empowering collaboration:

Collaborate seamlessly with Live Spreadsheets macro, a feature within the Smart Tables app. Work together with your team in real-time to enhance your sales pipeline, using data-driven insights to make informed decisions. With Live Spreadsheets, your team can collaborate on budget reviews, forecast analysis, and more, making decisions together in a dynamic and efficient environment.

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Sales Dashboard / Q4 Sales Reporting for X Product

quarters.

- Lead Acquisition:** Analyze the sources of leads and the effectiveness of different lead generation channels.
- Sales Pipeline:** Evaluate the progression of leads through the sales pipeline and identify any bottlenecks or areas for improvement.

	A	B	C	D	E	F	G	H	I	J
1	Date	Lead Source	Lead Status	Opportunity A	Close Date	Sales Rep	Industry	Region	Company Size	Lead C
2	2024-03-01	Webinar	Qualified	\$10,000	2024-03-15	John	Technology	East	Medium	High
3	2024-03-05	Referral	Contacted	\$15,000	2024-03-20	Sarah	Finance	West	Large	Medium
4	2024-03-10	Cold Call	Negotiation	\$20,000	2024-03-25	Mark	Healthcare	South	Small	Low
5	2024-03-15	Webinar	Hassen Chtioui		2024-03-30	Emily	Technology	Midwest	Medium	High
6	2024-03-20	Webinar	Qualified	\$12,000	2024-04-05	John	Retail	East	Large	
7	2024-03-25	Referral	Contacted	\$18,000	2024-04-10	Sarah	Technology	West	Medium	
8	2024-03-30	Cold Call	Negotiation	\$22,000	2024-04-15	Mark	Finance	South	Small	
9	2024-04-05	Webinar	Closed Won	\$27,000	2024-04-20	Emily	Healthcare	Midwest	Large	
10	2024-04-10	Webinar	Qualified	\$14,000	2024-04-25	Salma Sahnoun		East	Medium	Low
11	2024-04-15	Referral	Contacted	\$20,000	2024-04-30	Sarah	Technology	West	Large	High
12	2024-04-20	Cold Call	Negotiation	\$25,000	2024-05-05	Mark	Healthcare	South	Small	Low
13	2024-04-25	Webinar	Closed Won	\$30,000	2024-05-10	Emily	Finance	Midwest	Large	
14										

**Collaborative editing**

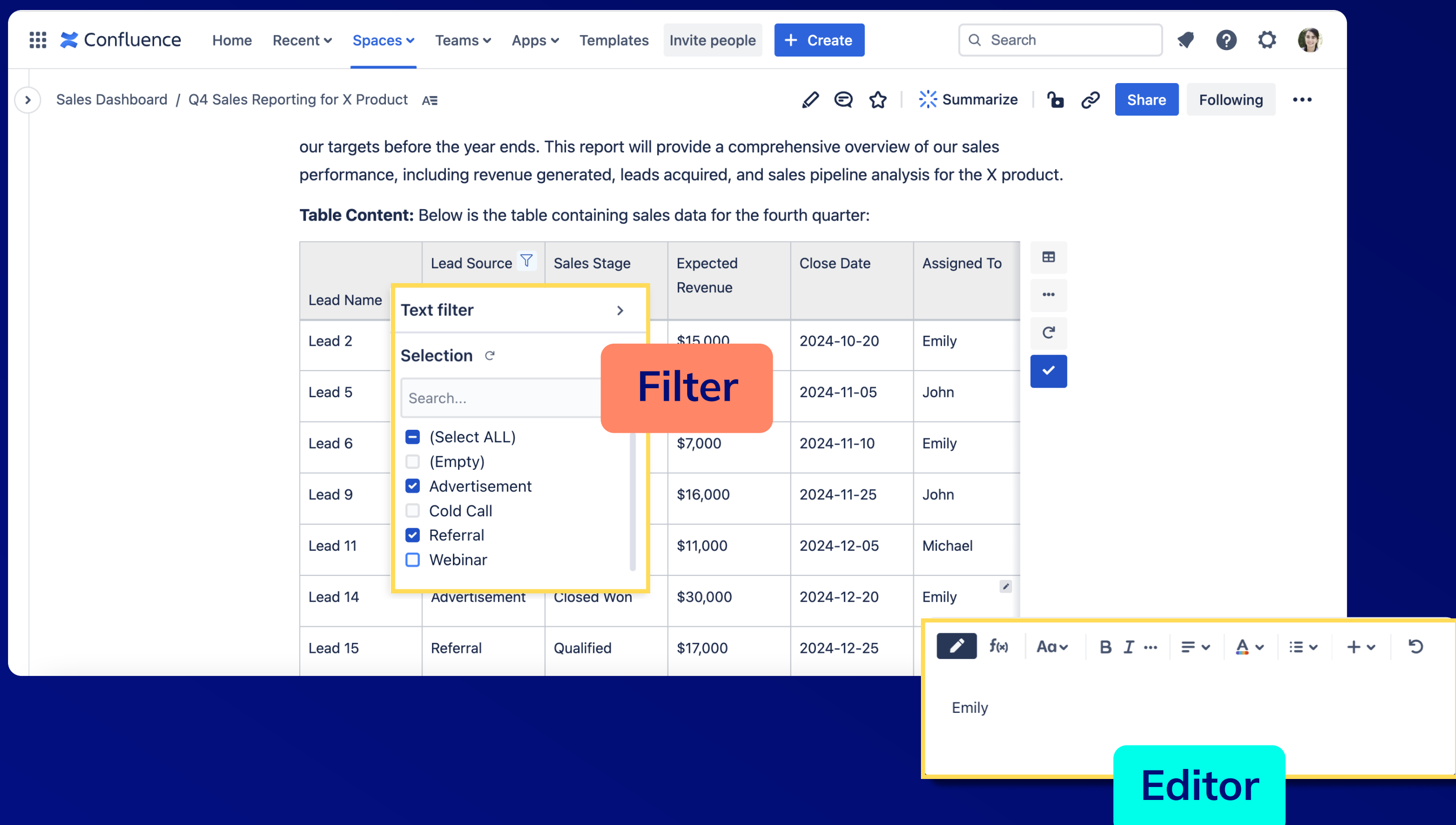
## Edit and filter with ease:

### Effortless editing with Smart Tables:

For sales managers who are updating their team's monthly sales figures directly on Confluence pages, Smart Tables' inline table editor lets you do just that. No need for fancy extra tools. Just click on any cell while viewing your page, make your updates, add some flair with formatting, or even apply macros. It's quick, easy, and painless. With Smart Tables, you'll browse your sales data updates, saving valuable time for more important tasks like closing deals and converting leads.

### Precision filtering for insightful analysis:

For sales analysts, trying to figure out which marketing campaign is driving the most leads. With Smart Tables, you can filter your sales data by specific lead sources using text or selection filters. Whether it's leads from webinars, referrals, or cold calls. Smart Tables' persistent filtering feature lets you switch between different filter criteria with ease. With the persistent filter feature you will be able to uncover insights and tailor your analysis to your exact needs.



The screenshot shows a Confluence page titled "Sales Dashboard / Q4 Sales Reporting for X Product". The page contains a table with sales data for the fourth quarter. A filter menu is open over the table, showing options for "Text filter" and "Selection". The "Selection" menu is currently active, showing a search bar and several filter options: "(Select ALL)", "(Empty)", "Advertisement", "Referral", and "Webinar". A red "Filter" label is overlaid on the filter menu. Below the table, an inline editor is visible, showing a text input field with the word "Emily" and a rich text toolbar with various formatting options. A red "Editor" label is overlaid on the editor.

Lead Name	Lead Source	Sales Stage	Expected Revenue	Close Date	Assigned To
Lead 2			\$15,000	2024-10-20	Emily
Lead 5				2024-11-05	John
Lead 6			\$7,000	2024-11-10	Emily
Lead 9			\$16,000	2024-11-25	John
Lead 11			\$11,000	2024-12-05	Michael
Lead 14	Advertisement	Closed Won	\$30,000	2024-12-20	Emily
Lead 15	Referral	Qualified	\$17,000	2024-12-25	