

Claude Dashboards prompt pack: 15 questions to ask your data

Copy-paste prompts for Claude Dashboards (beta, Pro, Max, Team and Enterprise). Connect a data source first, then paste one prompt and swap in your own names.

WHAT THIS ADDS

Anthropic's tip is to ask what you want to know, not just what to chart, and to name the table or app where the data lives. Every prompt below follows that rule.

Sales and pipeline (an app like Salesforce)

1. Make a dashboard of my open Salesforce opportunities by stage and owner. (*Anthropic's example*)
2. Which stage do most of my open opportunities sit in, and for how long?
3. Show deals won and lost per month this year, with total value.
4. List the 10 largest open opportunities with no activity in the last 14 days.
5. Compare this quarter's pipeline with last quarter's, by owner.

Customers and signups

1. Show weekly signups for the last six months, split by plan. (*Anthropic's example*)
2. How do this month's signups by channel compare with last month's? (*Anthropic's example*)
3. Show how many new customers we added each week and how many cancelled.
4. Which plan has grown fastest over the last 90 days?
5. Show repeat customers vs first-time customers per month.

Revenue and operations

1. Build a dashboard of this quarter's revenue by region. (*Anthropic's example*)
2. Show revenue by product for the last 12 months, with a running total.
3. What is our average order value per week, and is it going up or down?
4. Show our top 10 customers by revenue this year.
5. Show orders per day of the week, so I can see our busiest days.

Follow-ups that make any dashboard better

- Add a filter for region. (*Anthropic's example*)
- Change this to a weekly view. (*Anthropic's example*)
- Explain how this number was calculated.
- Show this next to the same period last year.

Prompts marked as Anthropic's examples come from Anthropic's announcement and help center. The rest are Fynl's suggestions; results depend on the data you connect.

DO THIS

Pick one prompt, run it, then click a number to check the query before you share the dashboard.

What Fynl.io is

One portal a small business runs itself on, instead of five subscriptions that do not talk to each other.

- A CRM and pipeline that shows every lead and where it stopped
- A calendar clients can book straight into
- Quotes, contracts and invoices, with deposits taken up front
- A website and form builder, so the enquiry lands in the same place
- Your Gmail connected, so the whole thread sits on the contact
- Automations for the follow-up you keep forgetting to send

The AI runs on **your own Claude or ChatGPT key** — no markup on it. No SMS or phone calls yet. \$49/month per business, \$149 Agency, and we move your contacts over for you.

When a Claude dashboard tells you which leads or deals need attention, Fynl.io is where you act on them: the CRM, calendar, quotes and invoices in one portal, with AI that runs on your own Claude or ChatGPT key and no markup.

Sources

- Build live dashboards and animate explainers with Claude (Anthropic, Oct 8, 2026) — <https://claude.com/resources/articles/dashboards-and-motion>
- Get started with Claude Dashboards (Claude Help Center) — <https://support.claude.com/en/articles/17454700-get-started-with-claude-dashboards>
- Get started with Claude Motion (Claude Help Center) — <https://support.claude.com/en/articles/17454997-get-started-with-claude-motion>