

Mellon Feedback on Dashboard

1.28.26



#2 "Total Leads in Pipeline"

#1 "New Leads – Past 7 Days"

#4 "Weighted Pipeline Value"

#3 "Priority Candidates"

Dashboard

Welcome back. Here's an overview of your performance.

Total Leads

--

This week

Qualified Leads

--

This week

Pipeline Value

--

Weighted

Hot Candidates

--

Active


View Latest Rep...

Lead Trends

Chart will be rendered here

Pipeline by Stage

Chart will be rendered here



DashboardPipelineContactsAction PlansCalendar v2Hello Scott!

+ Prospects ⓘ




Pipeline Type: Active ☒ ⓘ

Main Contact Only: ☐

199 in Prospects Pipeline

Search Contact..

Priority: ● ● ● ●



New Lead
\$0 - 25

Outbound Call
\$0 - 113

Inbound Contact
\$0 - 14

Initial Call Scheduled
\$0 - 20

Initial Call Complete
\$0 - 4

QR
\$0

| | | | | | |
|---|---|---|---|---|-------------------------------------|
| #Daria Of Hollyw... ☆ Default \$0.00 0d | Adam Lewis ☆ Default \$0.00 9d | Allen Rivani ☆ Default \$0.00 2d | Al Akopyan ☆ Default \$0.00 1d | Edward Carls ☆ Default \$0.00 1d | Antonella ☆ Default \$0.00 1d |
| Andrew Rush ☆ Default \$0.00 0d | Alberto Rivera Jr ☆ Default \$0.00 8d | Anthony Adamo ☆ Default \$0.00 2d | Arthur Clarke ☆ Default \$0.00 2d | Gazi Alam ☆ \$0.00 2d | Blake Be ☆ Default \$0.00 7d |
| Bob Waltenspiel ☆ Default \$0.00 0d | All Tosh ☆ Default \$0.00 8d | Bishwajit Saha ☆ \$0.00 9d | Bryan Hessler ☆ Default \$0.00 2d | George Keyer ☆ Default \$0.00 2d | Ciro Sco ☆ Default \$0.00 7d |
| brian pierse ☆ Default \$0.00 0d | Amit Patel ☆ Default \$0.00 55d | Dilip Javeri ☆ Default \$0.00 2d | Chris Schneider ☆ Default \$0.00 2d | Tom Marchese Trio Restaurant ☆ Default \$0.00 140d | Frank Di ☆ Default \$0.00 1d |
| Bryan Lucas | Andres Almeida | Dina Catanzano | Erik Dimech | | Jeff Fort |

Pipeline value is combined dollar amount in all stages from "New Lead" to "FA Sent"



+ Products ⓘ

Pipeline Name: Active ☒ ⓘ

200 in Prospects Pipeline

Search Contact..



Priority:



QR Returned
\$0 - 0

FDD Sent
\$0 - 0

FDD Signed
\$90,000 - 3

FDD Review Call Sched...
\$0 - 0

FDD Review Call Compl...
\$0 - 0

De
\$0

Joe Prestigiacomo

☆ Default
\$0.00 2d



Pierre Younan

☆
\$0.00 125d



Steven Small

☆ Default
\$90000 16d



Qualified Candidates are all
candidates from QR Returned
through FA Sent Stages



Antonello Di Meo

Brooklyn Water Bagel

Last Contacted Date : 2026-01-27



Opportunity

1



Appt Set

Quoted Closed CMPL

Deal Size



Odds

%

Close Date

Default



90000

4

%

April 28, 2026



Action Plan

Connection to QR complete

Sales Cycle

QR Sent

Lead Source

aiADZ - Facebook



Contact Info #28912014



Assigned User



Julia Alvarado



First Name

Antonello

Last Name

Di Meo

Company

Title

Email

antonello101983@outlook.com

Cell Phone

(443) 653-4076



Cell Ext

Cell E

OK to SMS?



Blocked



Record



Whiteboard

Log-a-Call

History



Text

Email

Event

Whiteboard



Add Note



Choose a template



Font



Size



Formats



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1.26.26 Has worked in a bagel place before. Likes the early mornings and nights free. Family owns 4 independent pizza restaurants. Maryland dev. Potential partner he's going to talk to

1.23.26 left vm

Brand: Brooklyn Water Bagel

First Name: Antonello

Last Name: Di Meo

City: Cockeysville

State: MD

288 in Prospects List

+ Add Prospects ⓘ

Email ⓘ

SMS ⓘ

Merge ⓘ

Change ⓘ

Update ⓘ

Import ⓘ

Export ⓘ

Push ⓘ

Release ⓘ

Delete ⓘ

Combined ⓘ

Send to Account

Link Contacts

« 1 2 3 ... 12 »

Main Contacts ▾

Search Contact.. 🔍

↺

📦

⚙️

| <input type="checkbox"/> | Name ▲ <div>● ● ●</div> | State ▲ | Email ▲ | Cell Phone ▲ | Action Plan ▲ | Sales Cycle ▲ | Lead Source ▲ | Created Date ▲ | Assigned User |
|--------------------------|----------------------------|---------|---------------------------|------------------|--|---------------|------------------|------------------|--------------------------------|
| <input type="checkbox"/> | Paul Ganz | FL | Pdganz720@gmail.com | 📞 (214) 415-4658 | INITIAL Brooklyn Water Bagel Connection Plan | | aiADZ - Facebook | January 28, 2026 | Julia Alvarado (juliabwb) |
| <input type="checkbox"/> | Patrick Blue | WA | lynxes_wanes0w@icloud.com | 📞 (509) 216-6309 | INITIAL Brooklyn Water Bagel Connection Plan | | aiADZ - Facebook | January 28, 2026 | Suzanne Bernal (suzbrooklyn) |
| <input type="checkbox"/> | Eric Meile | NJ | Ericmeile@icloud.com | 📞 (856) 425-3821 | No Action Plan Running | | aiADZ - Facebook | January 28, 2026 | Julia Alvarado (juliabwb) |
| <input type="checkbox"/> | Frank Bailey | KS | frank_w_bailey@yahoo.com | 📞 (254) 368-2862 | INITIAL Brooklyn Water Bagel Connection Plan | | aiADZ - Facebook | January 28, 2026 | Suzanne Bernal (suzbrooklyn) |
| <input type="checkbox"/> | Rob Keighron | SD | rkeighron@gmail.com | 📞 (718) 514-0445 | INITIAL Brooklyn Water Bagel Connection Plan | | aiADZ - Facebook | January 28, 2026 | Julia Alvarado (juliabwb) |

Capture Leads on a weekly basis

Contact Type:

Start Date:

End Date:

Main Contact Only:

Prospects ▾

Week To Date ▾

January 26, 2026

January 28, 2026

☒

Refresh Report

Milestone Period Comparison

Mo / Mo ▾

Count ▾

Vertical Bar Chart ▾