

# Mellon Feedback on Dashboard

1.28.26



Mellon Portal

Dashboard

Reports

Leads

Pipeline

Hot List

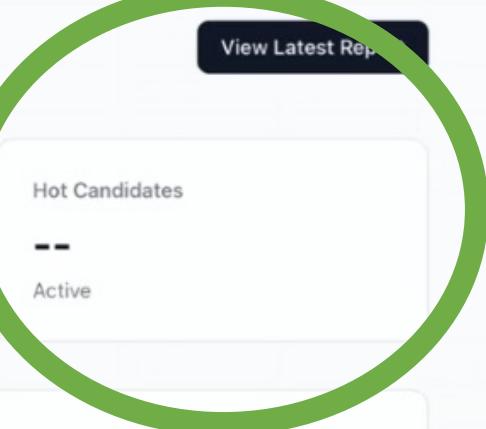
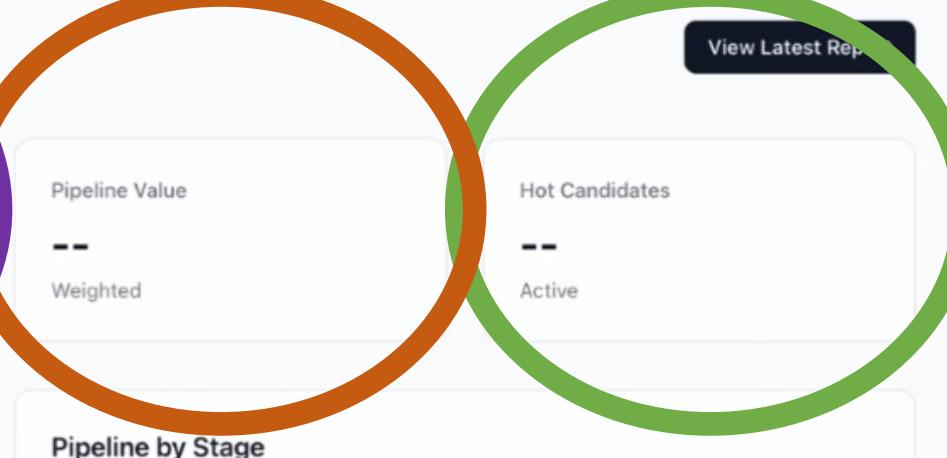
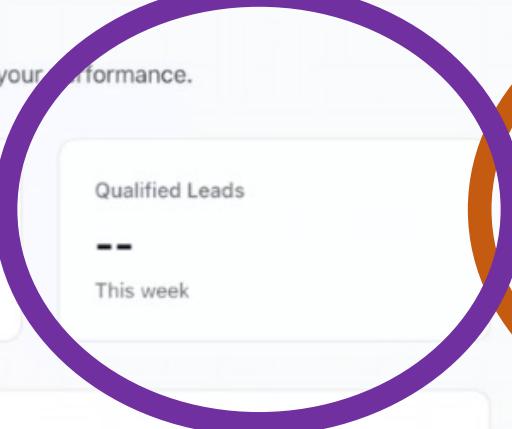
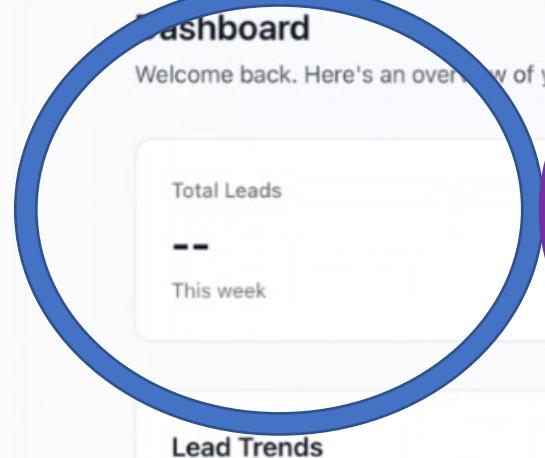
Dustin Randle

#2 "Total Leads in Pipeline"

#1 "New Leads – Past 7 Days"

#4 "Weighted Pipeline Value"

#3 "Priority Candidates"





Dashboard

Pipeline ▾

Contacts ▾

Action Plans ▾

Calendar v2

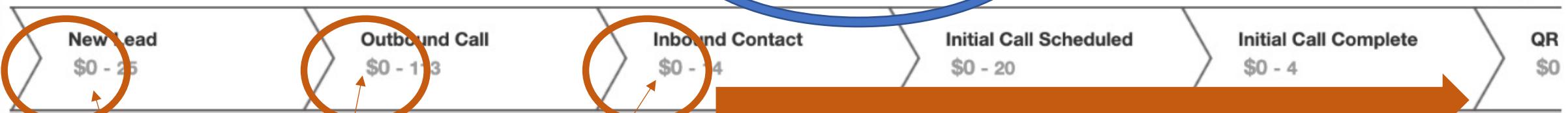
Hello Scott! ▾

+ Prospects ⓘ

Pipeline Type: Active Main Contact Only: 

199 in Prospects Pipeline

Search Contact..

Priority: ● ● ● ● 

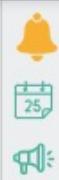
#Darla Of Hollyw...	Adam Lewis	Allen Rivani	Al Akopyan	Edward Carls	Antonelli...
☆ Default \$0.00 0d	☆ Default \$0.00 9d	☆ Default \$0.00 2d	☆ Default \$0.00 1d	☆ Default \$0.00 1d	☆ Default \$0.00 1d
Andrew Rush	Alberto Rivera Jr	Anthony Adamo	Arthur Clarke	Gazi Alam	Blake Be...
☆ Default \$0.00 0d	☆ Default \$0.00 8d	☆ Default \$0.00 2d	☆ Default \$0.00 2d	☆ Default \$0.00 2d	☆ Default \$0.00 7d
Bob Waltenspiel	All Tosh	Bishwajit Saha	Bryan Hessler	George Keyer	Ciro Sco...
☆ Default \$0.00 0d	☆ Default \$0.00 8d	☆ Default \$0.00 9d	☆ Default \$0.00 2d	☆ Default \$0.00 2d	☆ Default \$0.00 7d
brian pierse	Amit Patel	Dilip Javeri	Chris Schneider	Tom Marchese	Frank Dil...
☆ Default \$0.00 0d	☆ Default \$0.00 55d	☆ Default \$0.00 2d	☆ Default \$0.00 2d	Trio Restaurant ☆ Default \$0.00 140d	☆ 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"

[Dashboard](#)[Pipeline](#) ▾[Contacts](#) ▾[Action Plans](#) ▾[Calendar v2](#)[Hello Scott!](#) ▾

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

Joe Prestigiacomo
☆ Default \$0.00 2d
Pierre Younan
☆ \$0.00 125d
Steven Small
☆ Default \$90000 16d





Antonello Di Meo

Brooklyn Water Bage

Last Contacted Date : 2026-01-27

x

Hello Scott! ▾

Opportunity	1	★	+			Appt Set	Quoted	Closed	CMPL	Deal Size	Odds
Default										90000	4

Action Plan	Sales Cycle	Lead Source
Connection to QR complete	QR Sent	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

OK to SMS?

Blocked

Record

Whiteboard Log-a-Call History ⓘ ... Text Email Event

Whiteboard ⓘ  Add Note ⓘ Choose a template

Font Size Formats **B** U *I* ~~S~~ **A** **A**

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

The image displays two screenshots of a CRM application interface, likely HubSpot, illustrating lead capture and reporting features.

**Top Screenshot: Prospects List**

This screenshot shows a list of 288 prospects. The columns include:

- Name (with a color-coded status indicator: red, yellow, green)
- State
- Email
- Cell Phone
- Action Plan
- Sales Cycle
- Lead Source
- Created Date (highlighted with a purple oval)
- Assigned User

A purple arrow points from the "Created Date" column to a callout banner on the right.

**Callout Banner: Capture Leads on a weekly basis**

This banner is positioned on the right side of the top screenshot, above the reporting interface. It contains three small icons: a bell, a calendar, and a megaphone.

**Bottom Screenshot: Reporting Interface**

This screenshot shows a reporting interface with the following fields:

- Contact Type: Prospects (highlighted with a purple oval)
- Start Date: January 26, 2026
- End Date: January 28, 2026
- Main Contact Only: A toggle switch (highlighted with a purple oval)
- Refresh Report button

A purple arrow points from the "Main Contact Only" field to the "Contacts" menu item in the top navigation bar.

**Top Navigation Bar**

The top navigation bar includes the following items:

- Dashboard
- Pipeline
- Contacts
- Action Plans
- Calendar v2
- Hello Scott! (User Profile)

**Bottom Navigation Bar**

The bottom navigation bar includes the same set of items as the top one: Dashboard, Pipeline, Contacts, Action Plans, Calendar v2, and Hello Scott!.

**Milestone Period Comparison**

This section at the bottom allows users to compare milestones over different periods:

- Mo / Mo
- Count
- Vertical Bar Chart