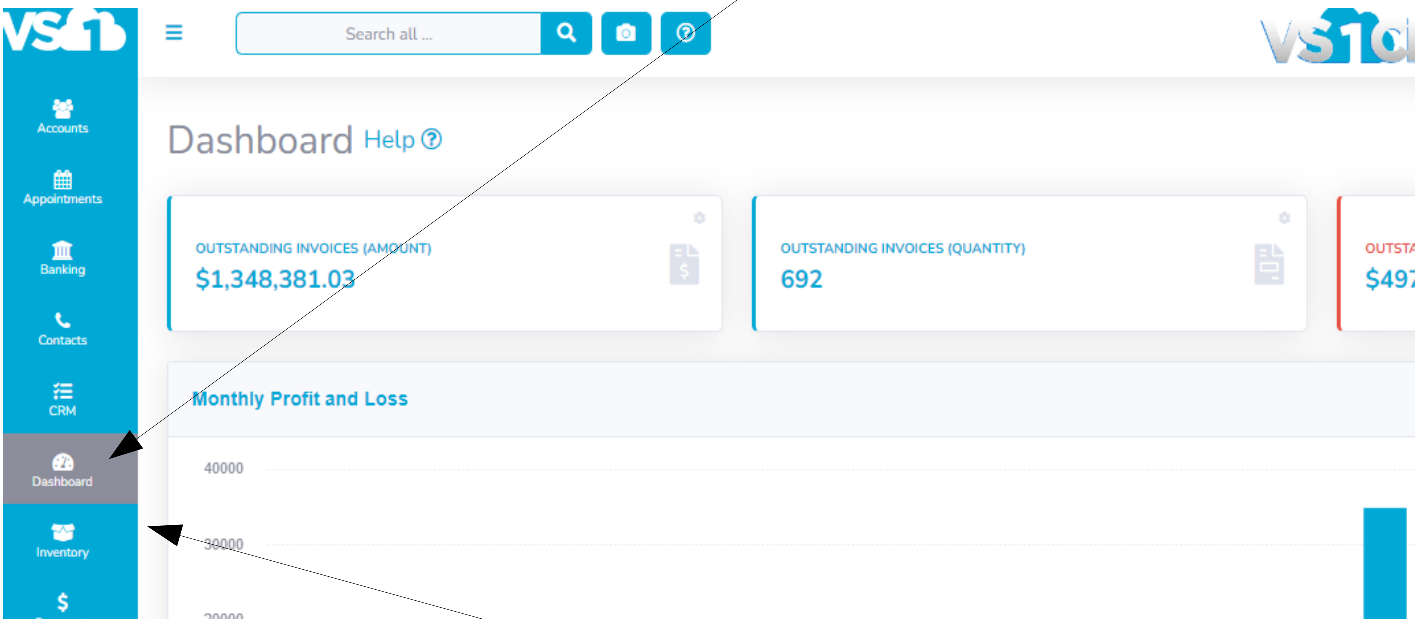
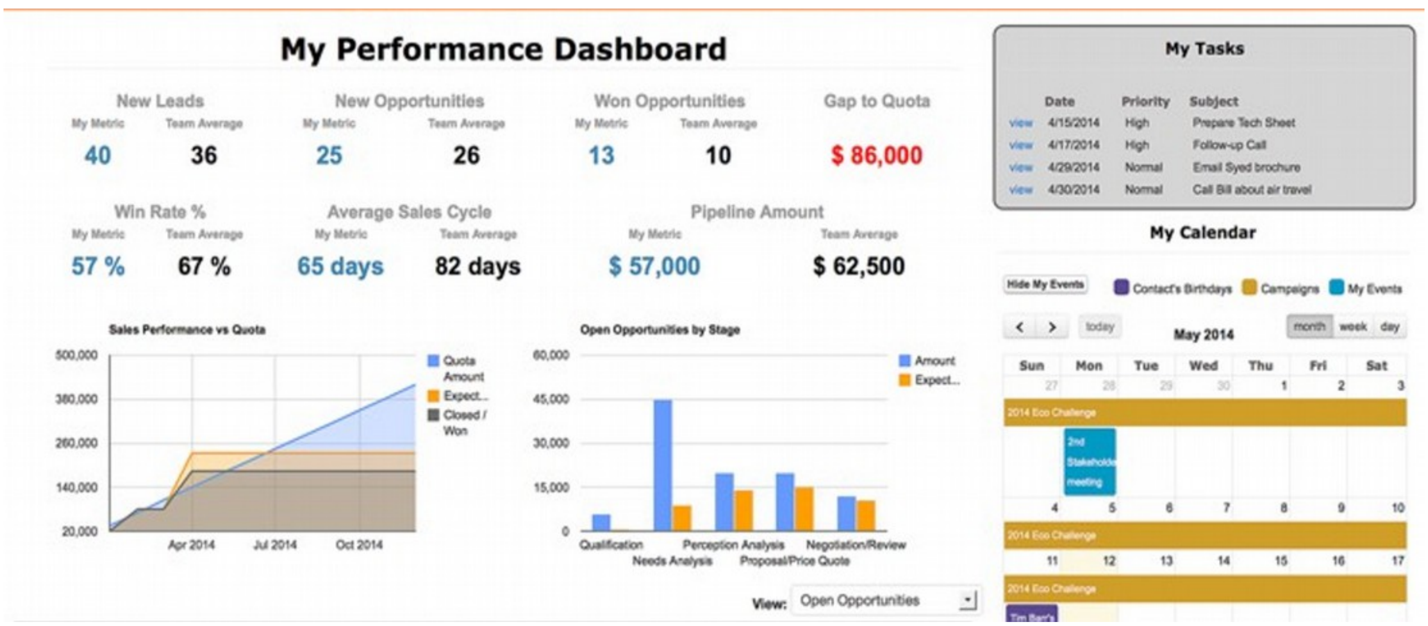
Rename current dashboard to “Dashboard - Accounts”



Add new Dashboard called “Dashboard - Sales”

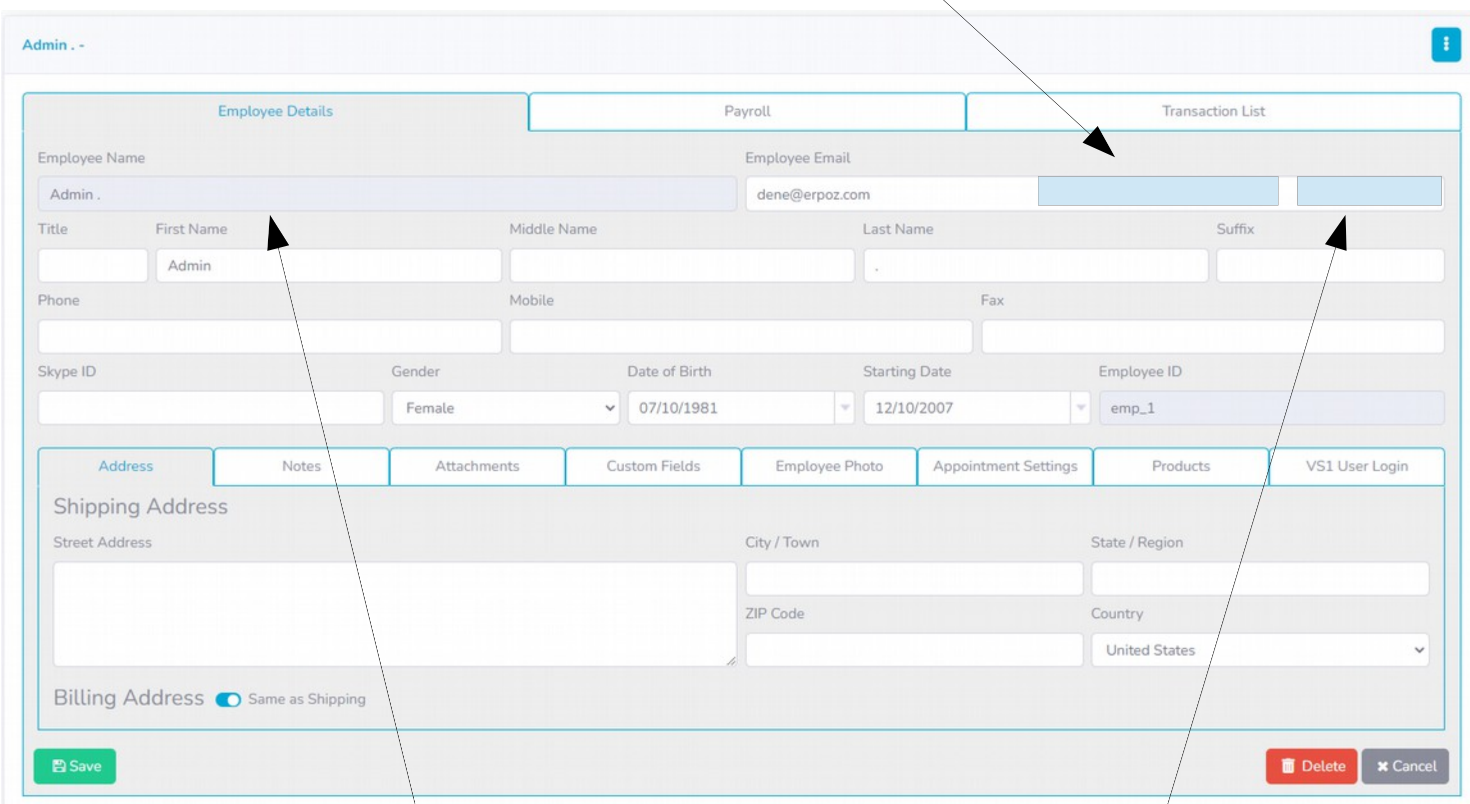
Label to be “My Performance Dashboard”



All cards and charts will have the drill down functionality. Drilling into them will open the reports related to the data

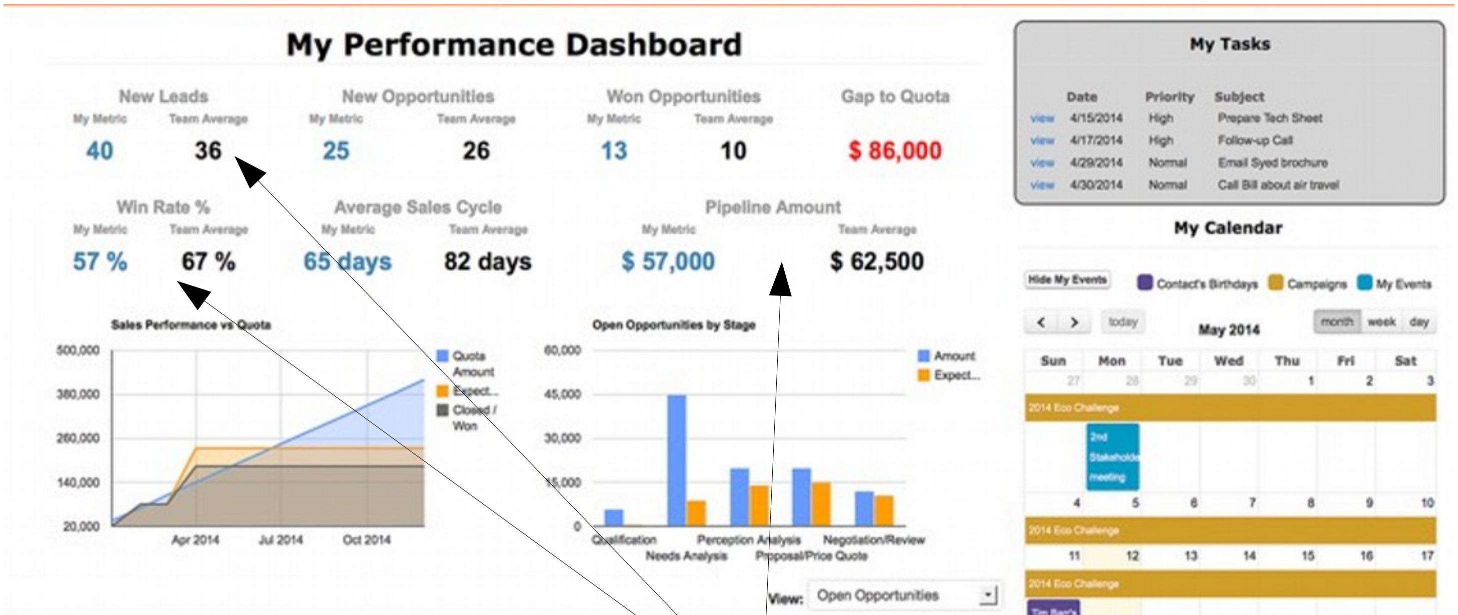
Add “Dashboard Options” drop down
This will then display as “Dashboard – My” on menu.

Options will be
“All”, “Accounts”, “Executive”, “Marketing”, “Sales”, “Sales Manager”

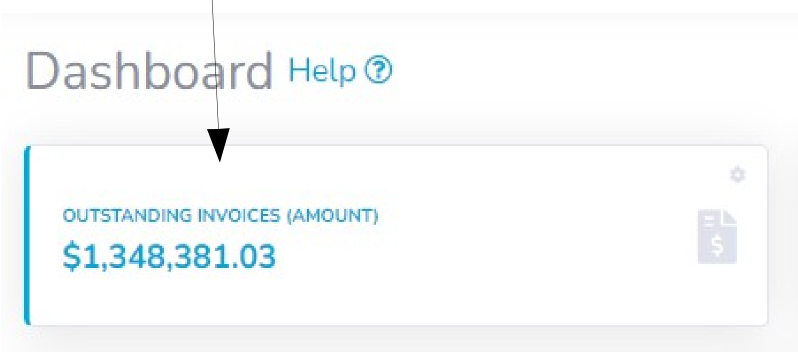


Make name smaller

Add “Sales Quota”



Use current cards for all of the above boxes



When mouse hover over Cards show hint as per description below
Of where the card has got its values.

<u>New Leads</u>

is Lead count for last 3 months where status is “Unqualified”

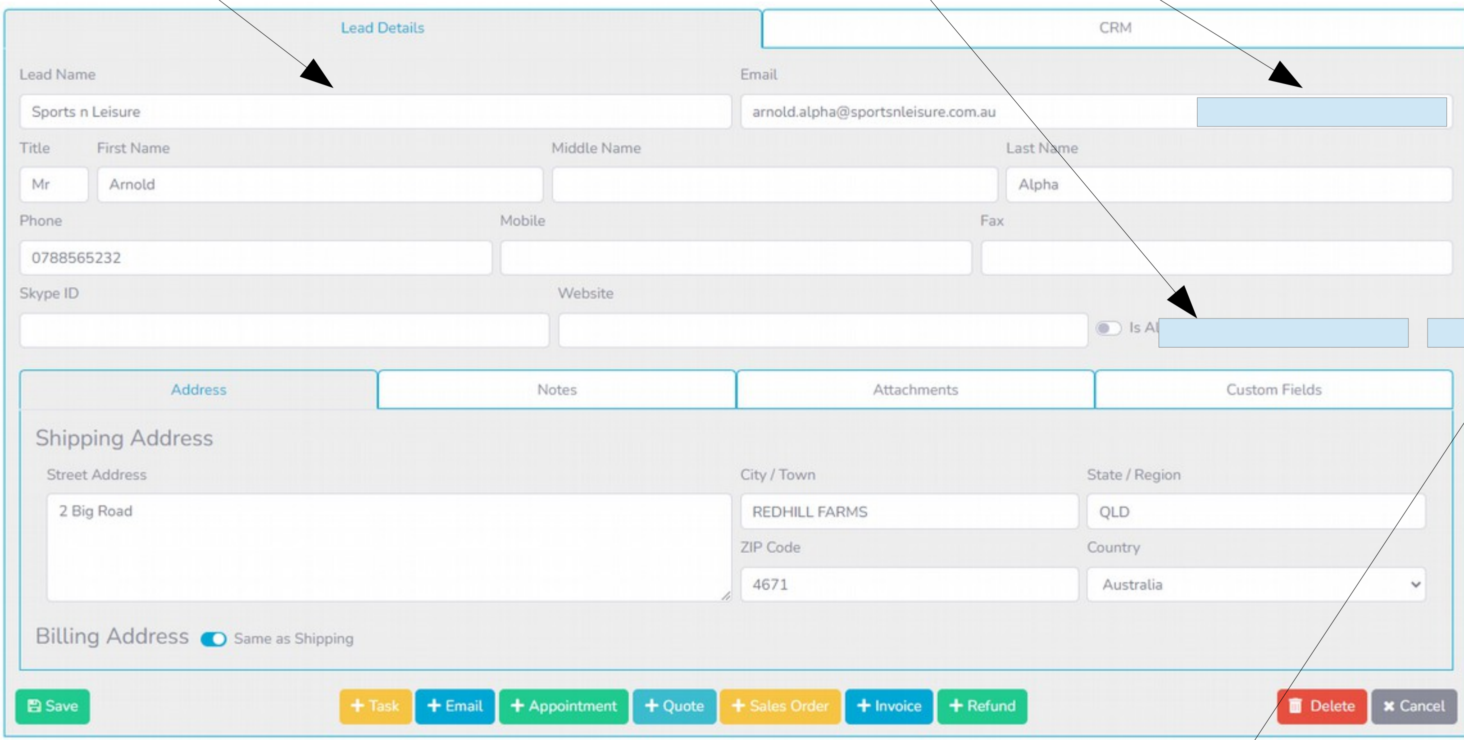
“My Metric” is Leads with my name

“Team Average” is all leads for the same period

Add “Status” Drop down to lead/Customer cards.

Add employee drop down. Called “Rep”
Move “Is a Supplier” label to right of drop down

Make name smaller



Add Source drop down.
Default values are “Google”, “Phone”, “Search Engine”, “Unknown” (Default)

User can add to this list at any time

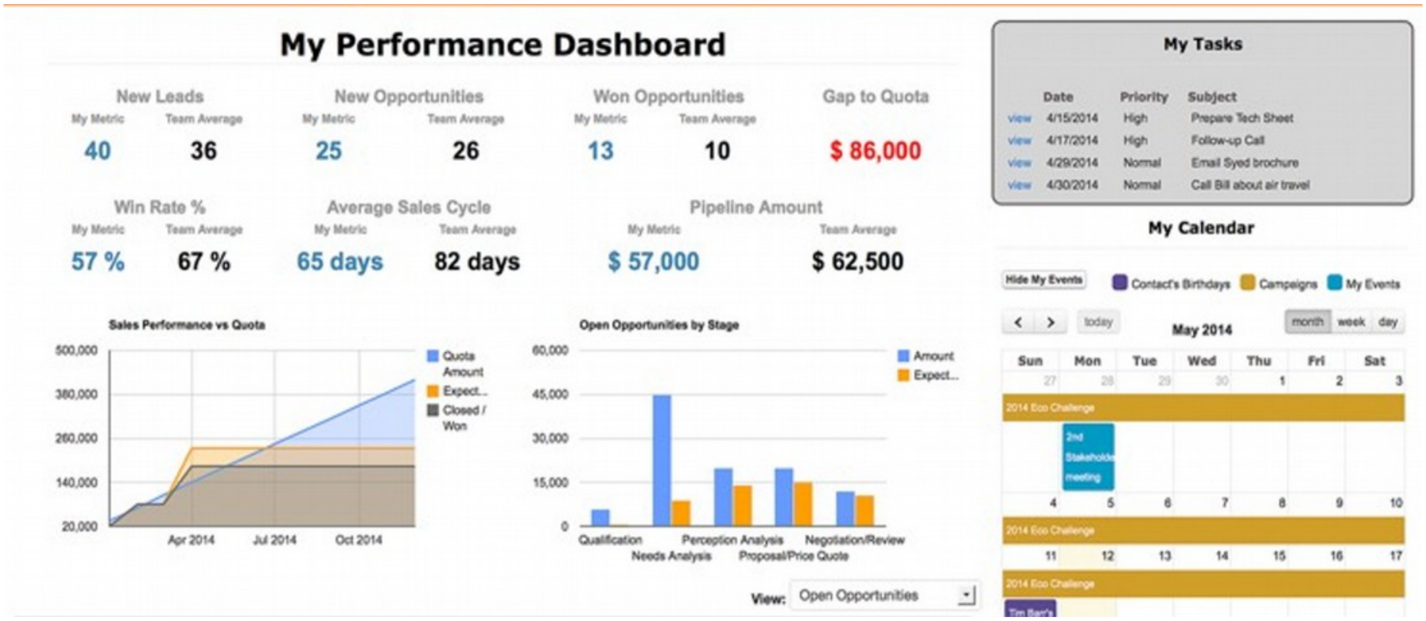
Default values for Status are “Unqualified” (Default), “Opportunity”' “Quoted”, “Invoiced”

User can add to this list at any time

Status updates automatically to “Quoted” if a quote is created.

Status updates automatically to “Invoiced” if a Invoice is created.

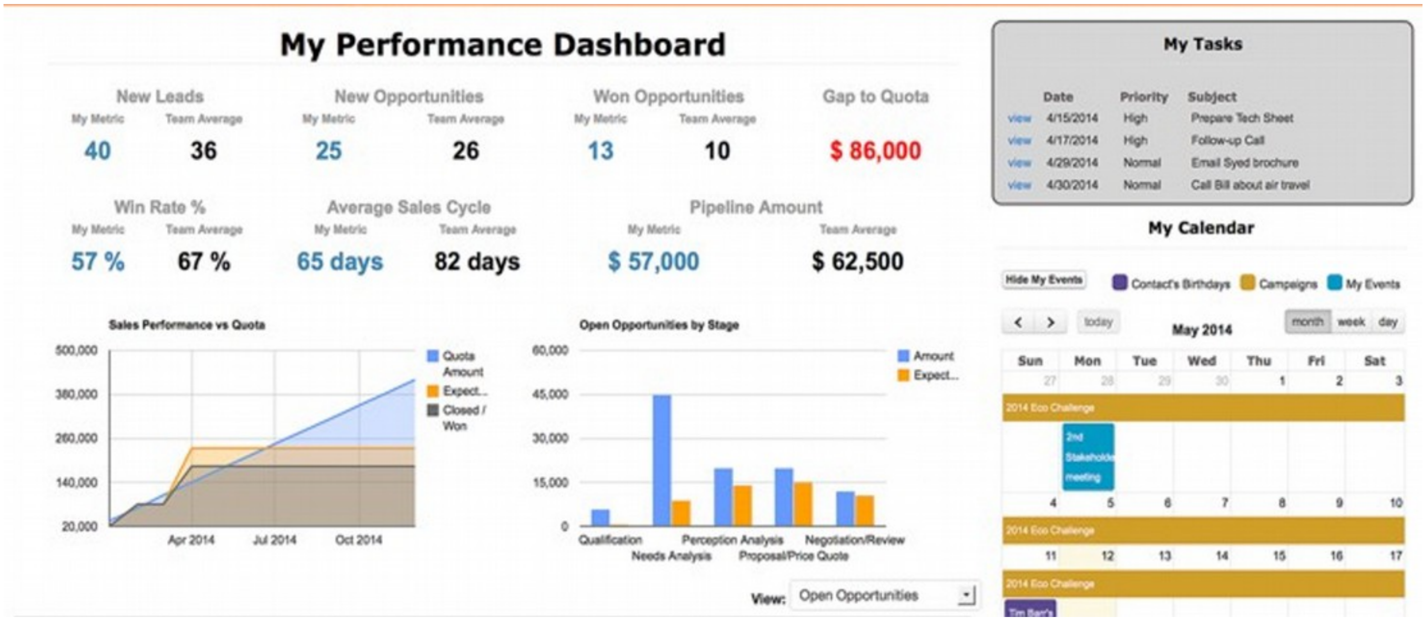
Make Skype ID field smaller



<u>New Opportunities</u>
is Lead count for last 3 months where status is “Opportunity”
“My Metric” is Leads with my name
“Team Average” is all leads for the same period

<u>Quoted Opportunities</u>
is Lead/Customer count for last 3 months where a quote has been made.
“My Metric” is Lead/Customer with my name
“Team Average” is all Lead/Customer for the same period

<u>Won Opportunities</u>
is Lead/Customer count for last 3 months where an Invoice has been made
“My Metric” is Lead/Customer with my name
“Team Average” is all Lead/Customer for the same period



<u>Win Rate %</u>
is Quote count for last 3 months where it is converted to an invoice

“My Metric” is Lead/Customer with my name

“Team Average” is all Lead/Customer for the same period

<u>Average Sales Cycle</u>
is average time taken where Lead/Customer status is converted from “Unqualified” to “Invoiced”

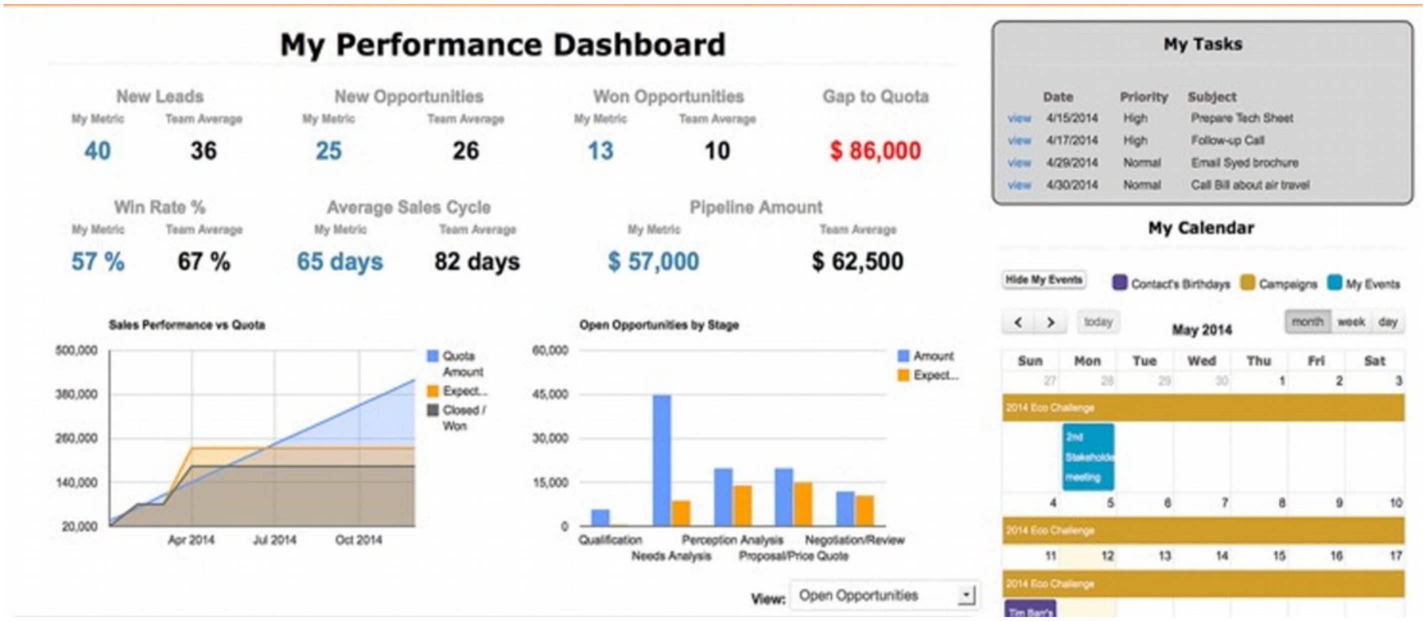
“My Metric” is Lead/Customer with my name

“Team Average” is all Lead/Customer for the same period

<u>Pipeline Amount</u>
is quotes from Lead/Customer for last 3 months where the quote has not been converted to an invoice.

“My Metric” is Lead/Customer with my name

“Team Average” is all Lead/Customer for the same period

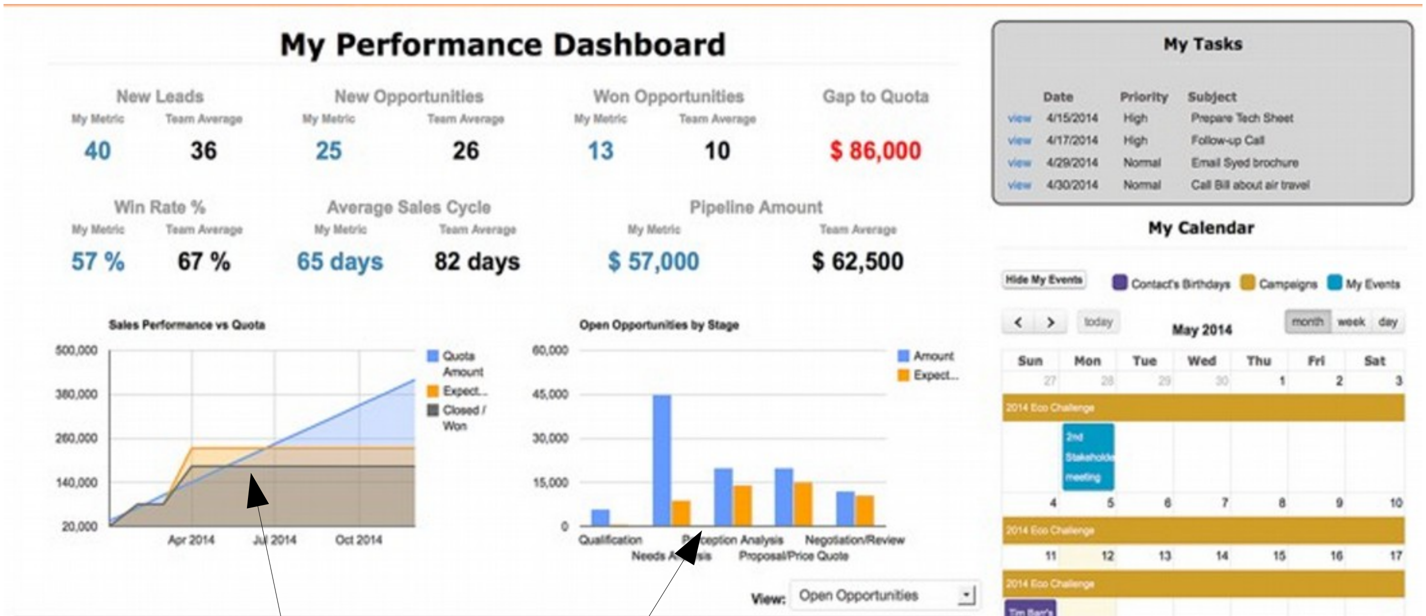


<u>Gap to Quota</u>

is value of Invoices for last 3 months

If more than “Quota” on employee card show “In Front” and colour Numbers green.

If less than “Quota” on employee card show “Behind” and colour Numbers Red.

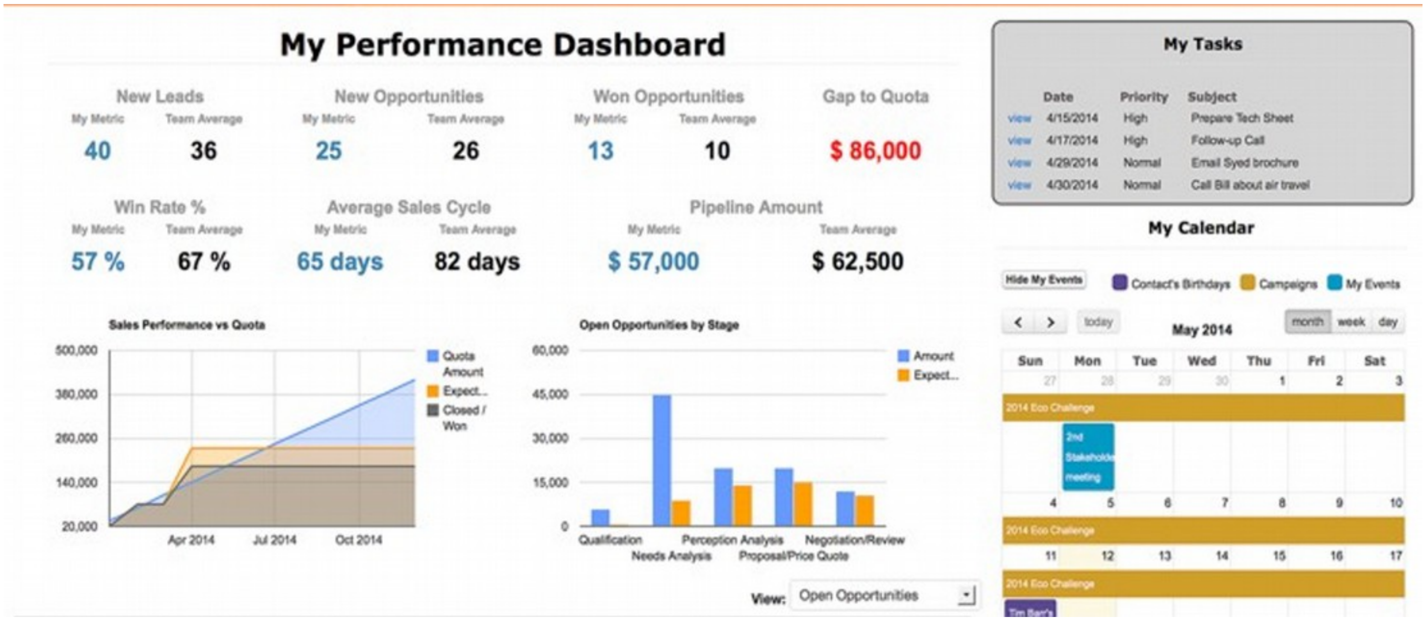


<u>Sales Performance vs Quota</u>
Is chart of Quota amount for last 6 months
Is chart of Quotes per month for last 6 months
Is chart of Invoices per month for last 6 months

<u>Open Opportunities vs Source</u>
Is chart of Lead/Customer count for last 6 months where a quote has been made.
Is chart of top 3 source counts for last 6 months where a quote has been made.

<u>My Tasks</u>
Is a list of Tasks from the CRM module.
Drilling into a task opens the actual task.
Drilling into the chart opens the CRM module.

<u>My Calendar</u>
Is a smaller version of the Appointment module
Drilling into an Appointment opens the actual appointment
Drilling into the chart opens the Appointment module



Show the current leads list below these charts