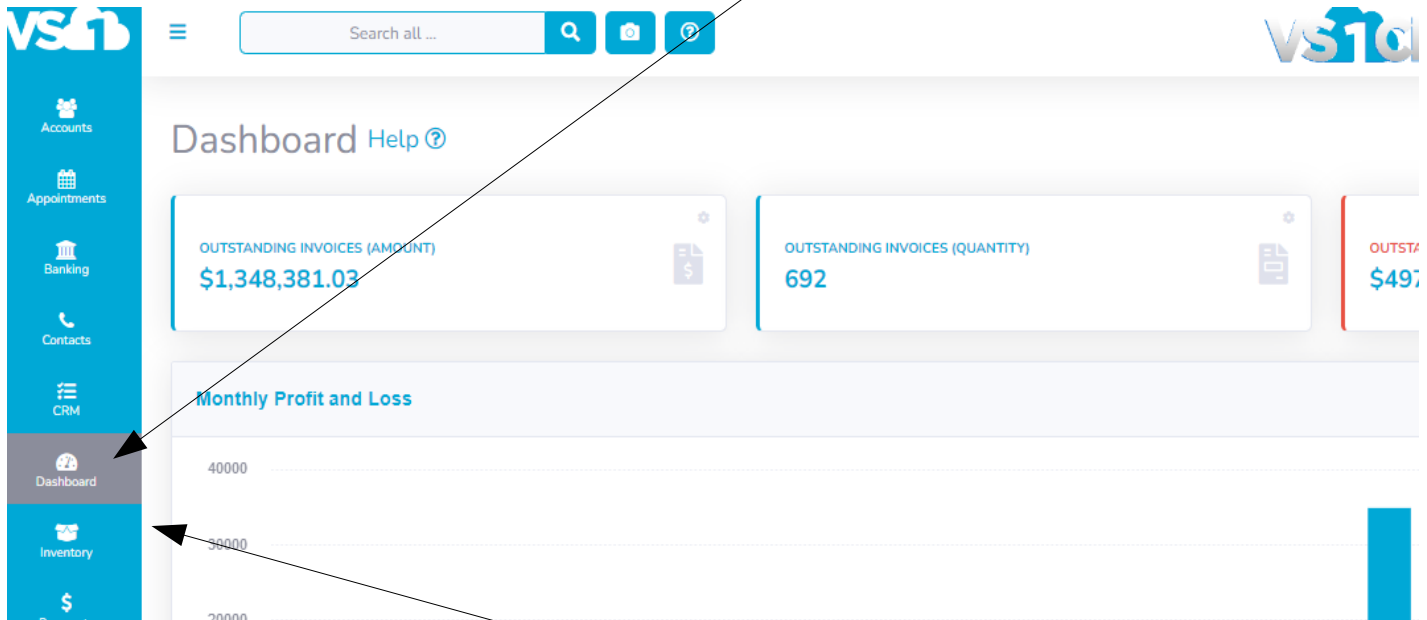
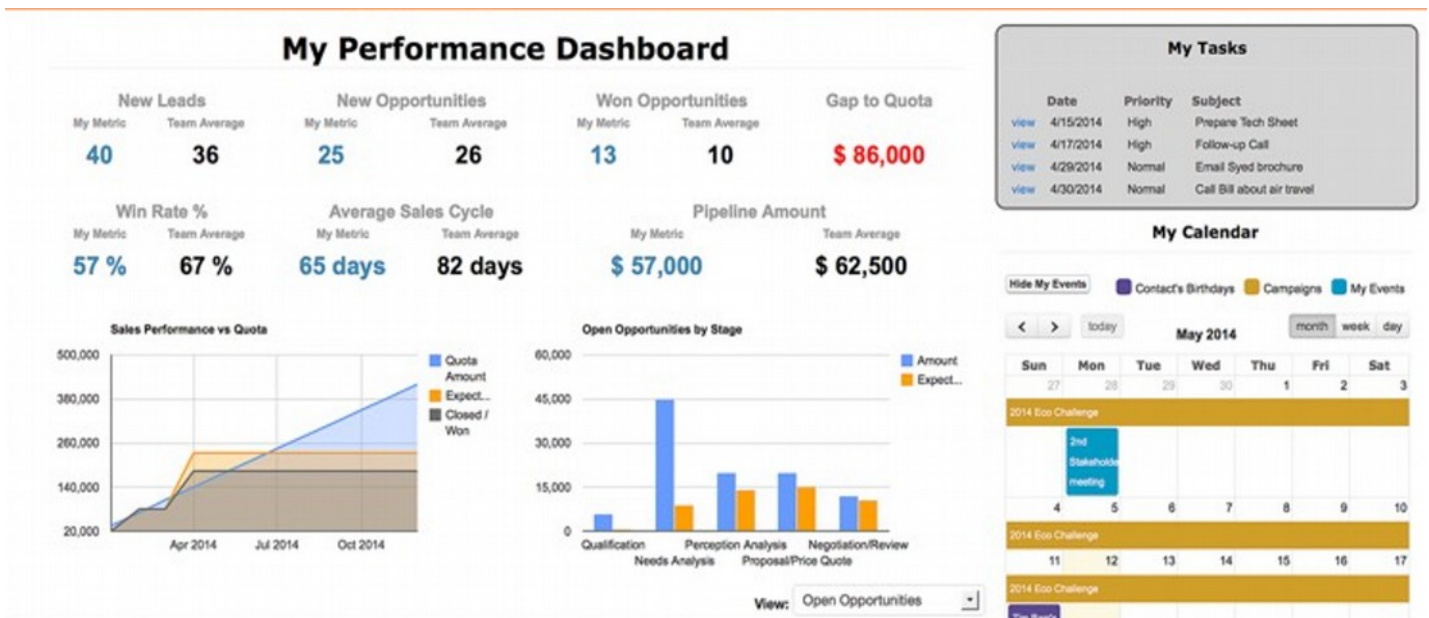


Rename current dashboard to “Dashboard - Accounts”



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

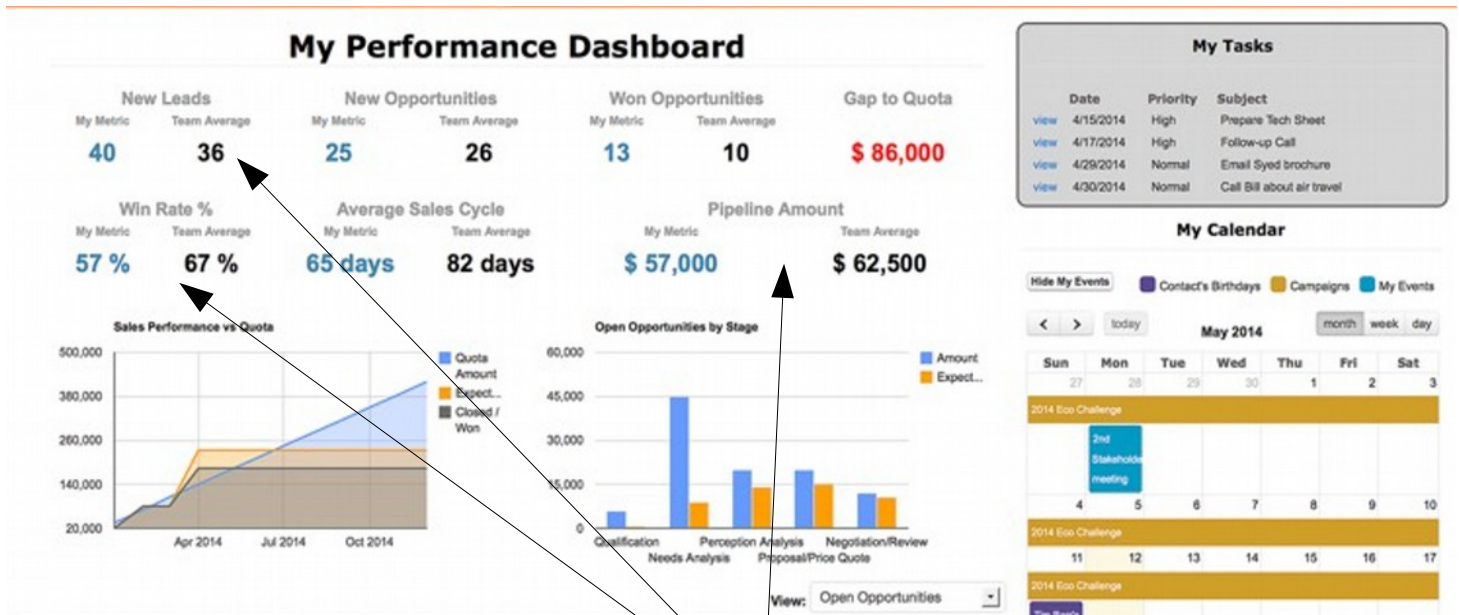
Add “Dashboard Options” drop down
This will then display as “Dashboard – My” on menu.

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

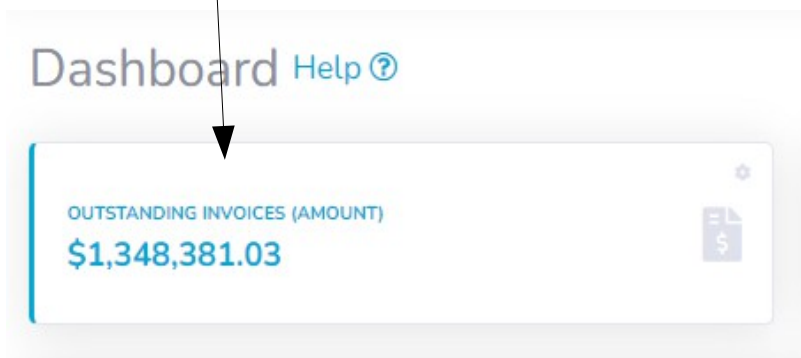
The screenshot shows an 'Admin' interface for managing employee details. At the top, there are three tabs: 'Employee Details' (active), 'Payroll', and 'Transaction List'. The 'Employee Details' tab contains several input fields: 'Employee Name' (with 'Admin.'), 'Employee Email' (with 'dene@erpoz.com'), 'Title', 'First Name' (with 'Admin'), 'Middle Name', 'Last Name', 'Suffix', 'Phone', 'Mobile', 'Fax', 'Skype ID', 'Gender' (set to 'Female'), 'Date of Birth' (07/10/1981), 'Starting Date' (12/10/2007), and 'Employee ID' (emp_1). Below these is a section for 'Shipping Address' with fields for 'Street Address', 'City / Town', 'State / Region', 'ZIP Code', and 'Country' (set to 'United States'). There is also a 'Billing Address' section with a toggle for 'Same as Shipping'. At the bottom, there are 'Save', 'Delete', and 'Cancel' buttons. Three arrows point to specific areas: one from the top text to the 'Transaction List' tab, one from the middle text to the 'First Name' field, and one from the bottom text to the 'Products' tab.

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.

New Leads

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

The screenshot shows a CRM 'Lead Details' form. At the top, there are tabs for 'Lead Details' and 'CRM'. The 'Lead Details' tab is active, showing fields for Lead Name (Sports n Leisure), Email (arnold.alpha@sportsnleisure.com.au), Title (Mr), First Name (Arnold), Middle Name, Last Name (Alpha), Phone (0788565232), Mobile, Fax, Skype ID, and Website. Below these is a section for 'Shipping Address' with fields for Street Address (2 Big Road), City / Town (REDHILL FARMS), State / Region (QLD), ZIP Code (4671), and Country (Australia). There is also a 'Billing Address' section with a toggle for 'Same as Shipping'. At the bottom, there are buttons for '+ Save', '+ Task', '+ Email', '+ Appointment', '+ Quote', '+ Sales Order', '+ Invoice', '+ Refund', '+ Delete', and '+ Cancel'. Annotations with arrows point to the 'Lead Name' field, the 'Email' field, the 'Is a Supplier' label, and the 'Source' drop-down menu.

Add Source drop down.

Default values are "Google", "Phone", "Search Engine",
"Unknown" (Default)

User can add to this list at any time

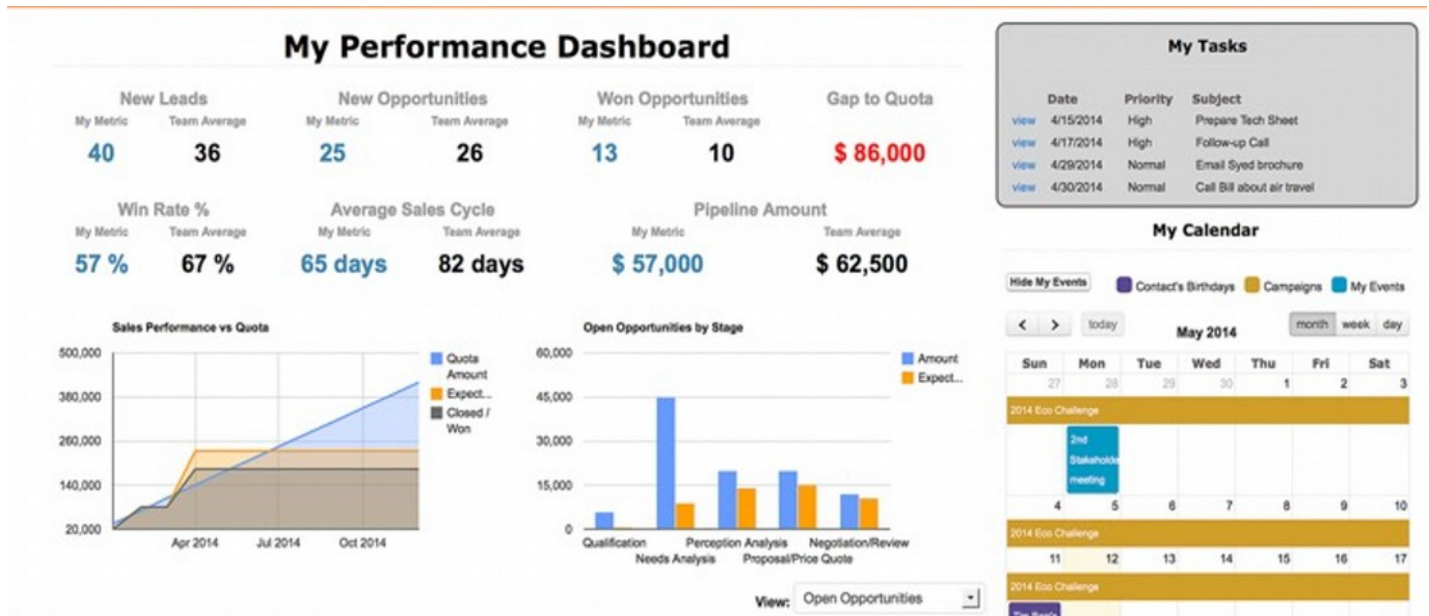
Default values for Status are "Unqualified" (Default),
"Opportunity" "Quoted", "Invoiced"

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



New Opportunities

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

Quoted Opportunities

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

Won Opportunities

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



Win Rate %

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

Average Sales Cycle

is average time taken where Lead/Customer status is converted from “Unqualified” to “Invoiced”

“My Metric” is Lead/Customer with my name

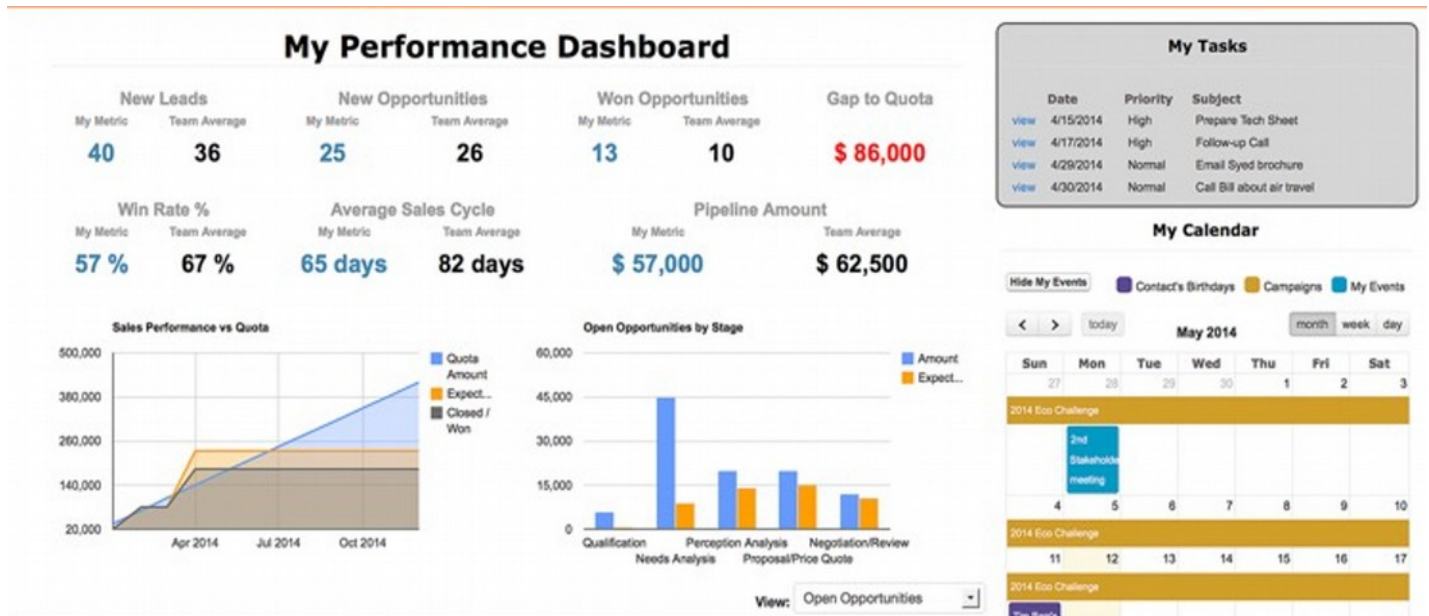
“Team Average” is all Lead/Customer for the same period

Pipeline Amount

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

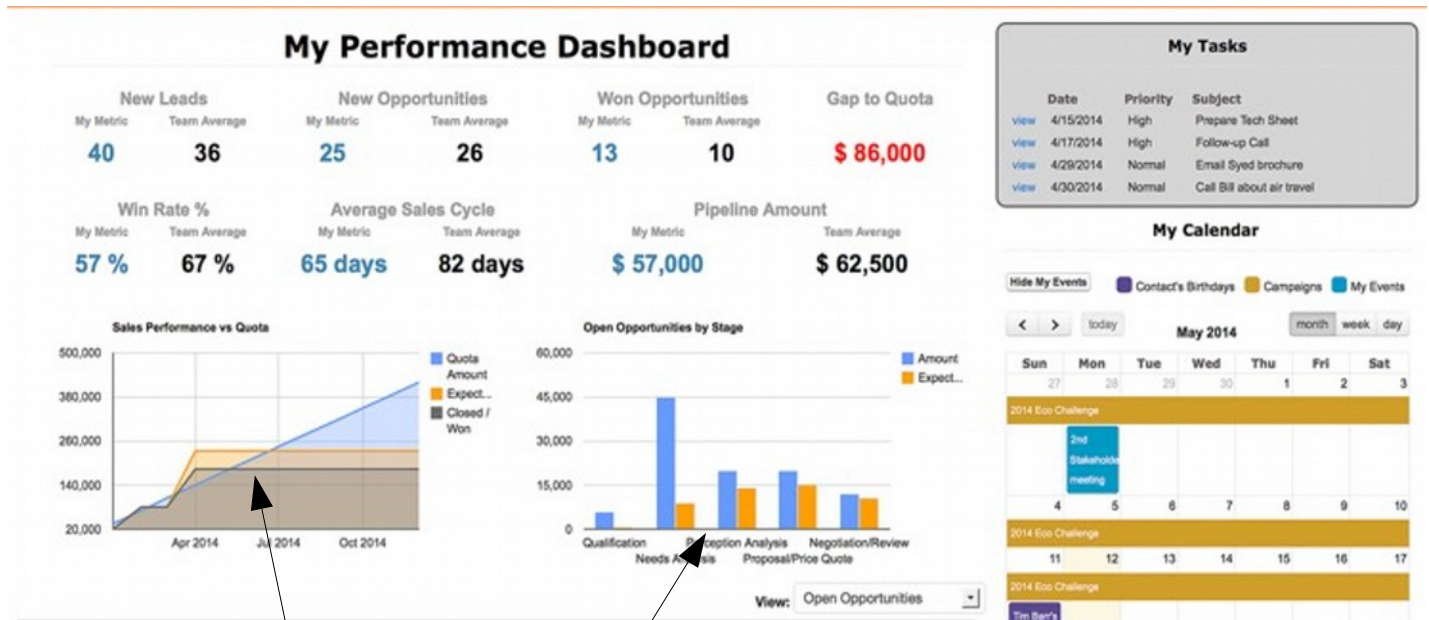


Gap to Quota

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.



Sales Performance vs Quota

Is chart of Quota amount for last 6 months

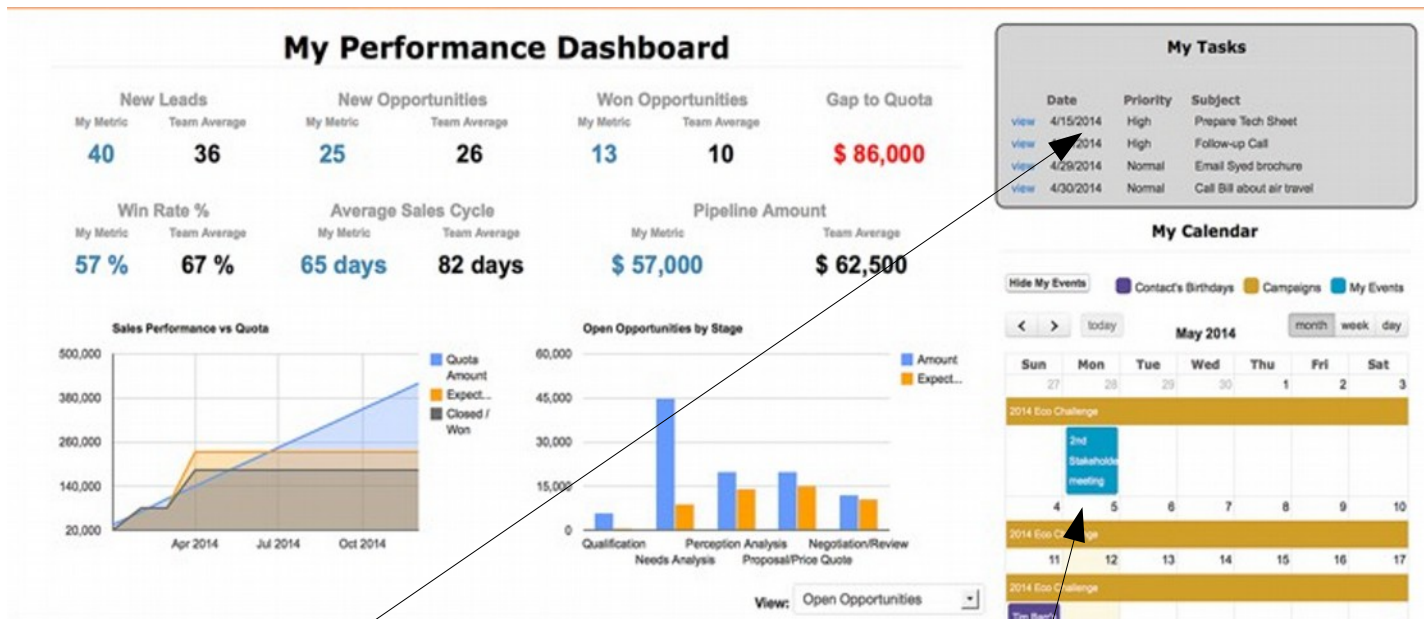
Is chart of Quotes per month for last 6 months

Is chart of Invoices per month for last 6 months

Open Opportunities vs Source

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.



My Tasks

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.

My Calendar

Is a smaller version of the Appointment module

Drilling into an Appointment opens the actual appointment

Drilling into the chart opens the Appointment module

My Performance Dashboard

New Leads

My Metric	Team Average
40	36

New Opportunities

My Metric	Team Average
25	26

Won Opportunities

My Metric	Team Average
13	10

Gap to Quota

\$ 86,000

Win Rate %

My Metric	Team Average
57 %	67 %

Average Sales Cycle

My Metric	Team Average
65 days	82 days

Pipeline Amount

My Metric	Team Average
\$ 57,000	\$ 62,500

Sales Performance vs Quota

Open Opportunities by Stage

View: Open Opportunities

My Tasks

Date	Priority	Subject
view 4/15/2014	High	Prepare Tech Sheet
view 4/17/2014	High	Follow-up Call
view 4/29/2014	Normal	Email Syed brochure
view 4/30/2014	Normal	Call Bill about air travel

My Calendar

Hide My Events | Contact's Birthdays | Campaigns | My Events

< > today May 2014 month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
2014 Eco Challenge						
	2nd Stakeholder meeting					
4	5	6	7	8	9	10
2014 Eco Challenge						
11	12	13	14	15	16	17
2014 Eco Challenge						
18	19	20	21	22	23	24

Show the current leads list below these charts

Leads [Help](#)

[Refresh](#) [+ New Lead](#) [Export](#) [Import](#) [Print](#) [-](#)

Search: [Search](#)

Show 25 entries

Employee Name	First Name	Last Name	Phone	Mobile	Email	Department	Address	Suburb	City
Bruno's Test Lead 06/20 1	Bruno	Braga	0614107961		brunoalexbraga@gmail.com		4 Dalbini Drive		Johannesburg
Bruno's Test Lead 06/20 2	Bruno	Braga	0614107961		brunoalexbraga@gmail.com		4 Dalbini Drive		Johannesburg

Showing 1 to 2 of 2 entries

[Previous](#) [1](#) [Next](#)