Legacy Shield Beacon Revisions

NOTE : Company owners will have All tabs an agent has plus an additional 2 tabs lead designation. Agency tree

Agent Login CANT CUSTOMIZE ANYTHING JUST VIEWING ONLY. This goes for every tab

****

Section 1

Dashboard tab

Top left graph will be company dials over the last 7 days
Top right graph will be company alp over the last 7 days

Instead of operational directive it will be company owners name and Quote company owner chooses

Get rid of system core broadcast thing under quote

Get rid of analytics hub and system audit on the bottom right for agent

Company owner can change quote and name

****

Section 2

Announcements Tab

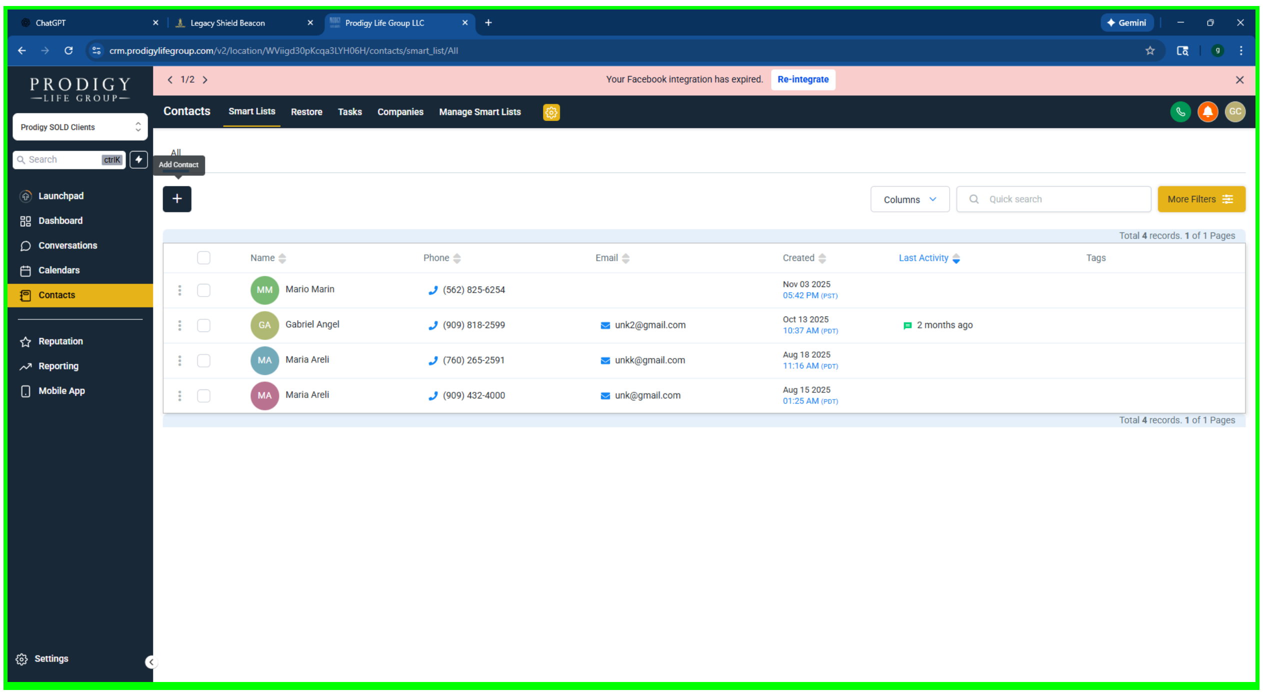
Will look like google slides with an option to click to the next slide underneath the slides. Will also be able to put videos on slides and also links to videos. It will act like a google slide will be able to change background and so forth. Company owner only able to edit.

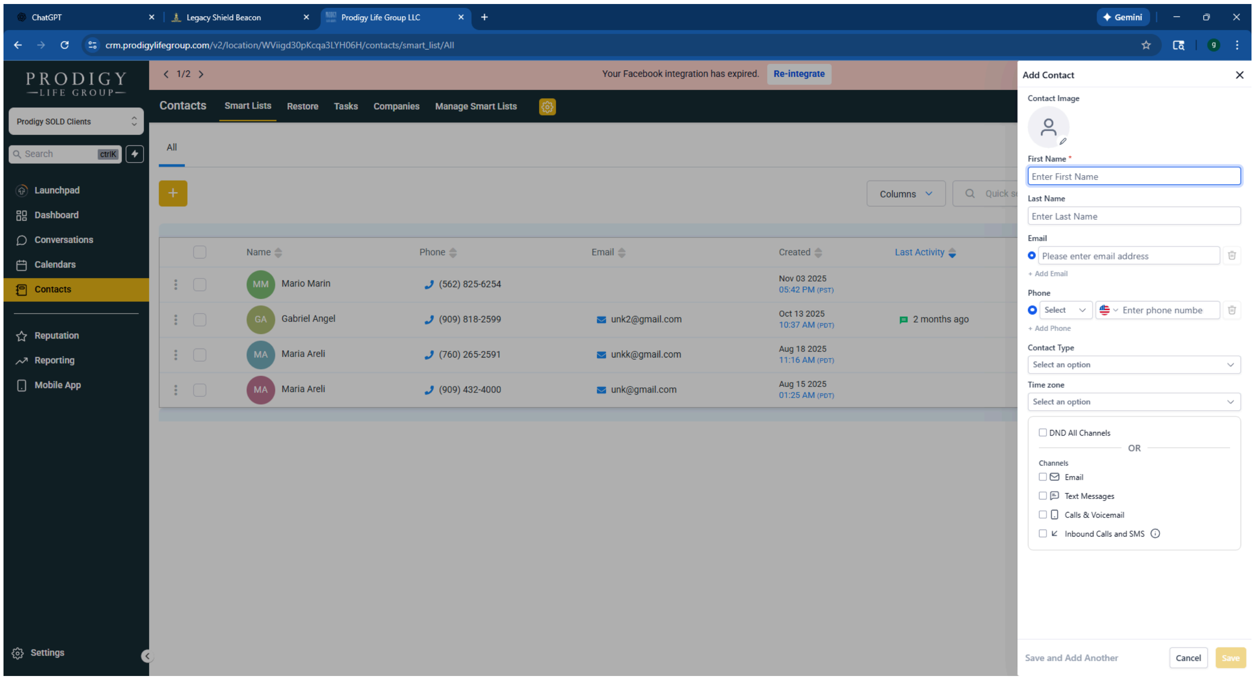
(Basically able to view inserted google slide)

****

Section 3

Contacts





I want to make it to where the company owner controls all the tabs on the left side. I want them to make as much or as little client info. They will also customize all answers to their liking. They can make all filters for client and on side menu. I want it to look exactly like the video.

https://drive.google.com/drive/folders/18VL9eEaMCOcl6zQTBNWvfZ5Bj6F2YR8u?usp=drive_link

****

Section 4

Conversations

Conversations tab is meant for if clients send a text message back to you or try to call you or leave you a voicemail so you can reach back out to them. It will help you keep track of your clients if they reach back out. It will also show if you previously called them before so you can keep track or call

attempts and such. Data will be shared from the dialer as well so if they were called by the dialer it will show on there.
https://drive.google.com/drive/folders/18VL9eEaMCOcl6zQTBNWvfZ5Bj6F2YR8u?usp=drive_link

****

Section 5
Pain Tracker

Keep everything the same just have it to where company owners can add as many trackers (FILTERS) as they want. Some companies need more than others. Company owners will be able to add the trackers. Supervisors will be adding the client information for agents to solve. But supervisors will not be able to add or take away trackers. (Trackers like Threat level, last intercept)

****

Section 6
Personal Tracker

Its perfect!!!!

Only thing i want to change are things being tracked
Top left Average daily Dials
Top 2nd tab Retention percentage
Top 3rd tab Lead vs referral ratio
Top right tab sales per 100 new leads

Bottom left graph will be alp from the last month. When clicked on will be able to view individual months and also be able to view year to date alp from sales. Will be able to see all history of alp
Bottom right graph views dial history like alp graph

****

Section 7

Company Arena

It's perfect!!!!!
Love the format

Add weekly and Yearly filter.

Have it to only track only one thing chosen. Those options will be alp, dails, retention, Lead vs referral ratio, profitability.

Dont remove anything from this tab its perfect just add the filters

****

SECTION 8
Company help tab

Get rid of contact support and just add helpful links. If they need help they will know to already contact their supervisors

Make it to where only company owners can edit it

****
****
****

AUTO DAILER

Section 9
Beacon

(Will be a pop-up not a tab)

Tabs there will be

Announcements

Will look like google slides with an option to click to the next slide underneath the slides.

This will lead to related announcements and or changes related to calling and stuff. Will be exactly like the announcements tab on other announcements tab.

Beacon

This is the actual auto dialer

Live calls

Erik will make this one (basically shrink it down and add multiples in a grid form to avoid doom scrolling) also go based of conversations

Call Logs

Advance filtering search

Company help tab

Same as other company help tab just related to calling sales and stuff