2. Deals Database

For closed deals, the prospect will just be transferred from the contact list to a new list. Agent needs to write down the ff.:

* deal amount
* project (choose between DBR--SR, TCRS, TFV)
* unit #

It would be nicer if you can make the TOTAL DEAL AMOUNT visible, with a month on month view of closed deals in units and amount, not sure if it should be on the dashboard or under DEALS.

3. Dashboard

Important items: all items may be filtered based on date (should be flexible. For example, I want to look at this week alone, or from a specific range ex. march 10 - march 18)--this should be easy if there's a datestamp for each contact created. See attached screenshots of what it appears on Hubspot. Doesn't need to be that extensive. You can just have options: ALL / MONTHLY / Specific date range FROM and TO

1. Total sales   
   -per team / per agent  
   -per project
2. Funnel: Awareness --> Consideration --> Decision  
   How many of the total leads (or, in the desired date range) are in each stage?
3. Average days to close: calculated by ave. contact creation to deal creation time



 Deals by source: automatically calculates where new closed deals come from based on the property SOURCE

 Contacts by source: automatically calculates where new prospects come from based on the property SOURCE



 Deals and Contacts by Country



 Contacts Created (can be a monthly view, too)

Looking forward to meeting with you again in a few weeks. Please let me know if you have questions in the interim. Feel free to send me screenshots of the progress so I can give feedback as you build each feature.

Thank you very much! :)