

DASHBOARD PAGE:

PROGRESS TRACKER LAYOUT: (Revenue & CIP Tracker, CI

Remaining Weeks: 6

5/20/2021	TARGET VS ACTUAL REVENUE (Quarter 2) - 2021								
TEAM	TARGET	INCENTIVE BASED REVENUE	EXCLUDED REVENUE SHARE	COMPANY REVENUE	TARGET VS. REVENUE %	# OF ONGOING (CIP)	TOTAL ONGOING (CIP)		
GRAND TOTAL	4,500,000	7,693,039.61	3,119,036.59	10,812,076.20	170.96%	18	2,420,500		
Agent	1,100,000	1,620,463.80	0.00	1,620,463.80	147.31%	0	0		
EHT	1,400,000	1,804,740.82	0.00	1,804,740.82	128.91%	18	2,420,500		
TAT	2,000,000	4,267,834.99	3,119,036.59	7,386,871.58	213.39%	0	0		
TEAM	CIP Target at (Quarterly)	Actual CIP (Quarterly)	% Achieved (Quarterly)	CIP Target at (Monthly)	Actual CIP (Monthly)	% Achieved (Quarterly)	CIP Target at (Weekly)	Actual CIP (Weekly)	% Achieved (Weekly)
TAT	10,526,315.79	2,306,000.00	21.91%	3,508,771.93	768,666.67	21.91%	8,187,134.50	2,306,000.00	28.17%
EHT	7,368,421.05	460,800.00	6.25%	2,456,140.35	153,600.00	6.25%	5,730,994.15	460,800.00	8.04%
AGENT	5,789,473.68	345,000.00	5.96%	1,929,824.56	115,000.00	5.96%	4,502,923.98	345,000.00	7.66%
TEAM	Ongoing (Buffer) Mid Stage	Failed Mid Stage	Ongoing (Buffer) Final Stage	Failed Final Stage	Offer Stage	Failed Offer Stage	Onboarded		
TAT	810,000.00	3,082,000.00	3,678,000.00	247,500.00	3,678,000.00	384,000.00	4,713,298.59		
EHT	295,000.00	417,000.00	948,500.00	204,700.00	948,500.00	285,000.00	1,091,538.00		
AGENT	295,000.00	417,000.00	0.00	0.00	0.00	60,000.00	4,267,834.99		

REVENUE & ONGOING CIP TRACKER:

5/20/2021	TARGET VS ACTUAL REVENUE (Quarter 2) - 2021						
TEAM	TARGET	INCENTIVE BASED REVENUE	EXCLUDED REVENUE SHARE	COMPANY REVENUE	TARGET VS. REVENUE %	# OF ONGOING (CIP)	TOTAL ONGOING (CIP)
GRAND TOTAL	4,500,000	7,693,039.61	3,119,036.59	10,812,076.20	170.96%	18	2,420,500
Agent	1,100,000	1,620,463.80	0.00	1,620,463.80	147.31%	0	0
EHT	1,400,000	1,804,740.82	0.00	1,804,740.82	128.91%	18	2,420,500
TAT	2,000,000	4,267,834.99	3,119,036.59	7,386,871.58	213.39%	0	0

- Dashboard should reflect data on a quarterly basis

- Date should be selectable and dashboard will reflect data based on the quarter of the selected date. Also, can we have a reset time, 12AM PH Time, for the dashboard's date so it would return to current date after the date was edited/changed.

- Requesting to create/have data fields (new Data Base) that will hold/store the values for the Target per Team, annually. Data fields should be: **TEAM, TARGET, CONVERSION RATE & YEAR**

TEAM: Display Active Teams set by the Admin.

TARGET: This will reflect the target set per team based on the year of the selected/current date

FORMULAS:

INCENTIVE BASED REVENUE = TEAM VCC Share Amount (with Remarks for Finance “Offer Accepted” & “Onboarded”)

EXCLUDED REVENUE SHARE = TEAM Consultant’s Take Amount (with Remarks for Finance “Offer Accepted” & “Onboarded”) except for **TEAM CONSULTANT**

COMPANY REVENUE: = Incentive Based Revenue + Clean Revenue

TARGET VS REVENUE = TEAM Incentive Based Revenue divided by TEAM Target

- **(GRAND TOTAL) TAGRGET VS REVENUE** = Grand Total Incentive Based Revenue divided by Grand Total Target

OF ONGOING (CIP) = Total number of active endorsements under **Mid & Final Stage** per TEAM

TOTAL ONGOING (CIP) = SPR amount of active endorsements under **Mid & Final Stage** per TEAM

CIP TRACKER:

TEAM	CIP Target at (Quarterly)	Actual CIP (Quarterly)	% Achieved (Quarterly)	CIP Target at (Monthly)	Actual CIP (Monthly)	% Achieved (Quarterly)	CIP Target at (Weekly)	Actual CIP (Weekly)	% Achieved (Weekly)
TAT	10,526,315.79	1,730,000.00	16.44%	3,508,771.93	576,666.67	16.44%	8,187,134.50	1,730,000.00	21.13%
EHT	7,368,421.05	251,000.00	3.41%	2,456,140.35	83,666.67	3.41%	5,730,994.15	251,000.00	4.38%
AGENT	5,789,473.68	512,100.00	8.85%	1,929,824.56	170,700.00	8.85%	4,502,923.98	512,100.00	11.37%

CIP TARGET AT:

QUARTERLY = Team Conversion Rate divided by Team Target

MONTHLY = QUARTERLY divided by 3

WEEKLY = (Current Week number divided by Total Week Number of current quarter) * **QUARTERLY**

ACTUAL CIP:

QUARTERLY = TEAM SPR Amount that will fall based on the quarter of the selected/current date.

MONTHLY = QUARTERLY divided by 3

WEEKLY = Same with Quarterly

% ACHIEVED:

QUARTERLY = Actual CIP / CIP Target

MONTHLY = Actual CIP / CIP Target

WEEKLY = Actual CIP / CIP Target

STAGING TRACKER:

TEAM	Ongoing (Buffer) Mid Stage	Failed Mid Stage	Ongoing (Buffer) Final Stage	Failed Final Stage	Offer Stage	Failed Offer Stage	Onboarded
TAT	810,000.00	2,965,000.00	3,678,000.00	247,500.00	3,678,000.00	384,000.00	4,713,298.59
EHT	295,000.00	1,055,000.00	948,500.00	204,700.00	948,500.00	285,000.00	1,091,538.00
AGENT	295,000.00	1,055,000.00	107,100.00	0.00	107,100.00	75,000.00	4,267,834.99

ONGOING (BUFFER) MID STAGE = TEAM SPR Amount under **Mid Stage** will fall on next quarter (e.g., if the selected date falls on Quarter 1 then the value should be reflected is from Quarter 2)

FAILED MID STAGE = TEAM SPR Amount based on the quarter of the selected/current date under **Mid Stage** of TAT Team, BOD Team & Consultant Team with keyword “**FAILED**” on **Remarks for Finance**

ONGOING (BUFFER) FINAL STAGE = TEAM SPR Amount under **Final Stage** will fall on next quarter (e.g., if the selected date falls on Quarter 1 then the value should be reflected is from Quarter 2)

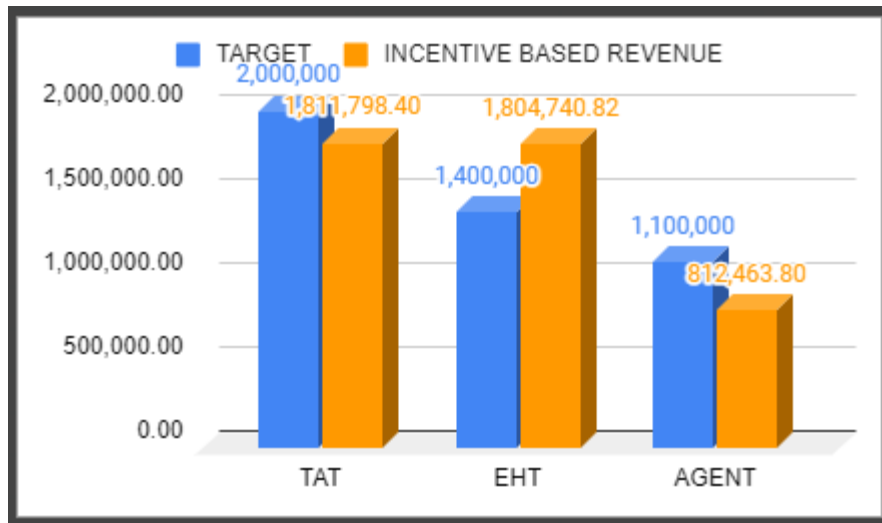
FAILED FINAL STAGE = TEAM SPR Amount based on the quarter of the selected/current date under **Final Stage** of TAT Team, BOD Team & Consultant Team with keyword “**FAILED**” on **Remarks for Finance**

OFFER STAGE = TEAM annual SPR Amount based on the year of the selected date; under **Final Stage** with remarks for Finance “**Offer Accepted**”

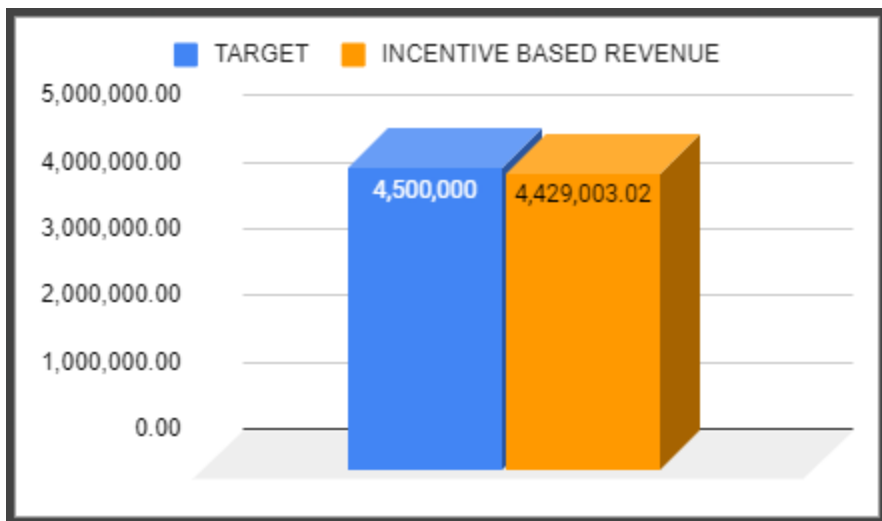
FAILED OFFER STAGE = Team annual SPR Amount based on the year of the selected date; under Final Stage with keywords “**Offer Rejected**”, “**Offer Declined**” or “**Reneged**” on **Remarks for Finance**

ONBOARDED = TEAM annual SPR Amount based on the year of the selected date; under **Final Stage** with remarks for Finance “**Onboarded**”

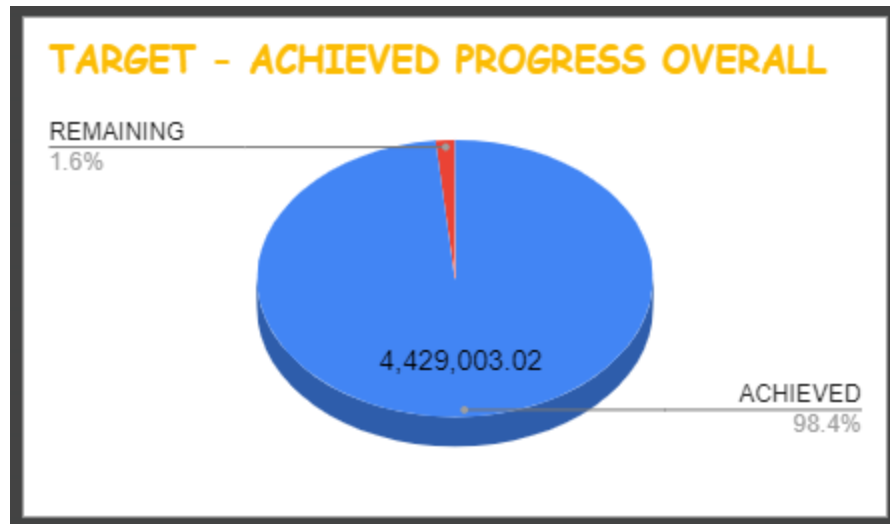
REVENUE DASHBOARD:



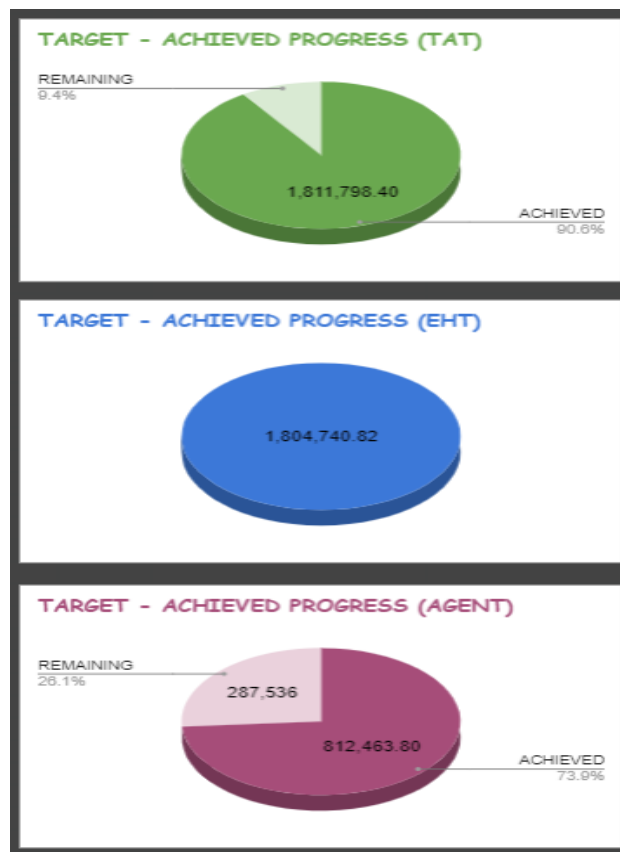
- Create a column chart that will compare Target VS Incentive Based Revenue of all teams reflected in **PROGRESS TRACKER**



- Create a column chart that will compare the Grand Total of Target VS Grand Total of Incentive Based reflected in **PROGRESS TRACKER**

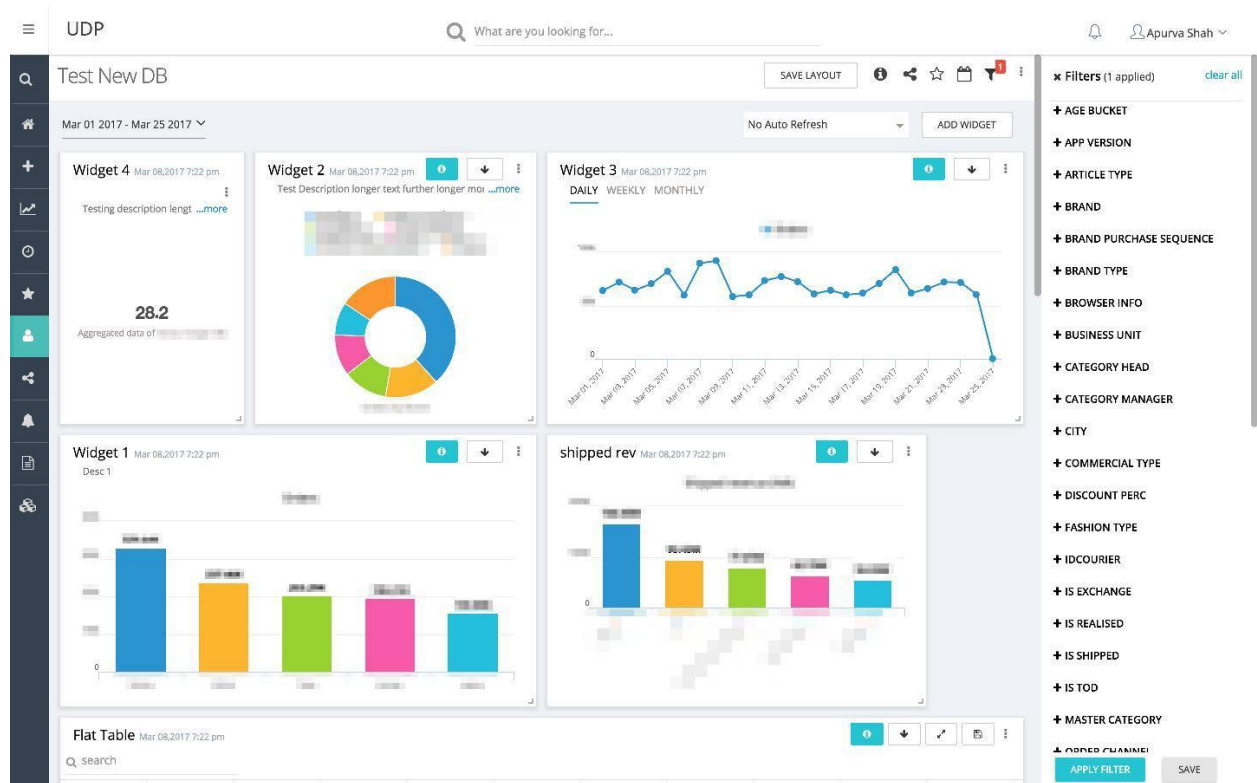


- Create a pie chart that will compare the Grand Total of Target VS Grand Total of Incentive Based reflected in **PROGRESS TRACKER**



- Create a pie chart per TEAM that will compare the Target VS. Incentive Based Revenue reflected in **PROGRESS TRACKER**

DASHBOARDING PLATFORM:



- Create a dashboarding platform to be able to create new dashboards, for future use.
- All data fields coming from SDB and JDL Database should be included.