# Title: [WIP] Sales goals frontend tech architecture

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## Links

|  |  |
| --- | --- |
| PM Spec |  |
| Freshrelease ticket | <https://freshworks.freshrelease.com/FSALES/issues/FSALES-8140> |
| Copy changes doc |  |
| Invision | <https://freshworks.invisionapp.com/d/main#/console/16632910/359504968/preview> |

## Basic Overview

Sales goals V1 provides basic goal tracking functionality based on won deal count and won deal amount for user and team goals with cards.

Sales goals is available for Garden, Estate and Forest Plan. (for which the required permissions are handled in the backend)

1) Sales goal page starts of with a list view which is implemented similar to LCAD pages to prompt reusability of things.

2) Some features that are present in the LCAD list and not present in Sales goals are Column customisation, Bulk actions, form service

3) Full sticky filters with no search for filter section + no operators for filters (only sales goals)

4) A filter text section that shows what filters has been applied (only sales goals)

5) Cards section that uses the filters from list view and also has its own filters on top of it

6) We have New (Bulk creation is possible in few aspects), Edit, Clone

7) A Recalculate goal option that recalculates the goals attainment, the attainment calculation is automated but for past goals we won't recalculate attainment unless manually done for performance optimisation

8) New period pickers => Week picker, Month picker, Quarter Picker and Year Picker (everything works on the assumption of account time zone)  
     that is the default period selected will be based on account time zone.   
     Past periods are not allowed to be picked and are disabled

## Filters section

#### Remove search in filters:

Due to only few filters being present, in accordance with PM's call we have removed the search of filters and made all the filters sticky

#### New Filters:

     We have introduced a new set of filters especially for sales goals from aesthetic point of view

* dropdown\_no\_op
* multi\_select\_no\_op
* grouped\_dropdown (used for owner\_id\_with\_type basically owner id)
* dynamic\_dependent\_dropdown (used for owner\_type)

***dropdown\_no\_op and multi\_select\_no\_op*:**

           These two filters are basically the same as dropdown and multi\_select with operators defaulted to is and is\_in respectively

***dynamic\_dependent\_dropdown and grouped\_dropdown:***

           This is a very interesting set of drop-downs, this bring outs relationship between two filters in dropdown  
         
           This provides a filter on grouped\_dropdown depending on its parent which would be a dynamic\_dependent\_dropdown. Though a similar feature is present in the filters for deal pipeline and deal stage  
           relationship, its so specific and is not scalable. We have made a few changes to it to make it reusable and generic.

***How it works?***

           grouped\_dropdown has a meta parameter called parent\_attr, through which it gets the value of its parent attribute and filters itself based on a property called group\_type that is present in the choices of  
           grouped\_dropdown

            The filtering of grouped\_dropdown will only happen when the parent dropdown changes or for the first time when component is rendered, we set a property called dependent\_fields on the parent attribute  
            which will have a list of all attributes dependent on it (this is computed in the serializer); Once an attribute changes, it will check if there is any dependent\_fields and then only it will start a computation.

## Periodic pickers

     We have created a few new periodic pickers like week picker, month picker, quarter picker and year picker which is based on account time zone for the requirements

     There was no third party addon we could use at the time, so we had to create them from scratch.