Dashboard

Table of Contents

1. [Dashboard 2](#_Toc375820979)

# Dashboard

**Functional Description**

This view displays the dashboard, which is the main page of ST and the first view a User sees when accessing the application.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| System Notifications | Text and/or Links |  | |  |
| **New Contacts Chart** | | | | |
| [# of New Contacts] | Text | New contacts created in the past 30 days. | |  |
| Percentage Change in New Contacts | Text | The percentage change in New Contacts between the current and previous 30-day periods | |  |
| Period | Text | Text equals: “Previous 30 days” | |  |
| Current period trend line depicting total database size | Line |  | |  |
| Previous period trend line depicting total database size | Line |  | |  |
| **New Traffic Chart** | | | | |
| [# of New Tours] | Text | New tours created in the past 30 days. | |  |
| Percentage Change in New Tours | Text | The percentage change in New Tours between the current and previous 30-day periods | |  |
| Period | Text | Text equals: “Previous 30 days” | |  |
| Current period trend line depicting total number of tours | Line |  | |  |
| Previous period trend line depicting total database size | Line |  | |  |
| **Traffic Types Chart** | | | | |
| Current period bar for each Tour type | Line |  | |  |
| Previous period bar for each Tour type | Line |  | |  |
| **Top 5 Lead Sources Chart** | | | | |
| [Top 5 Lead Sources for New Leads] | Pie | One slice for each of the Top 5 Lead Sources for New Leads | |  |
| [Other Lead Sources for New Leads] | Pie | One slice that totals all other Lead Sources for New Leads | |  |
| **Top 5 Traffic Sources Chart** | | | | |
| [Top 5 Lead Sources for New Tours] | Pie | One slice for each of the Top 5 Lead Sources for New Tours | |  |
| [Other Lead Sources for New Tours] | Pie | One slice that totals all other Lead Sources for New Tours | |  |
| **Opportunity Pipeline** | | | | |
| [Number of Opportunities] | Text |  | |  |
| [Opportunity Stage] | Pipeline | For each Opportunity Stage, display the following:   * Opportunity Stage * Number of Opportunities * Percent of Total | |  |
| **Hot List Table** | | | | |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| Lead Source | Text | First Lead Source | |  |
| Lifecycle | Text |  | |  |
| Lead Score | Text |  | |  |
| New Points | Text | Lead Score points accumulated during the specified period. | |  |
| **Campaigns List Table** | | | | |
| Campaigns | Link | Link to Campaign record | |  |
| Open Rate | Text | Opened/Delivered  Delivered = Sent – Bounced  Display as percentage | |  |
| Click Rate | Text | Clicked/Delivered  Delivered = Sent – Bounced  Display as percentage | |  |
| **Calendar and List** | | | | |
| Tours | Text | Applies to Calendar and List views | |  |
| Reminders | Text | Applies to Calendar and List views  Includes reminders for Actions associated with Contacts and Opportunities | |  |
| Campaigns | Text | Applies to Calendar  Display scheduled Campaigns | |  |
| **My Actions** | | | | |
| Action | Text | | Display 3-5 Actions (the number depends upon available space and/or what works well to balance the UI)  Includes Actions associated with Contacts & Opportunities |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Settings | Icon | Allows User to toggle visibility of Dashboard components  Options include:   * Top Row   + New Leads   + New Traffic   + Traffic Types * Middle Row   + Top 5 Lead Sources   + Top 5 Traffic Sources   + Opportunity Pipeline * Bottom Row   + Hot List   + Campaign List * Calendar & Actions   + Calendar   + Actions | |  |
| Day | Icon | Changes calendar view per selection | |  |
| Week | Icon | Changes calendar view per selection | |  |
| Month | Icon | Changes calendar view per selection | |  |
| Action Help Text | Popover | | Popover text to read: “These actions are not complete and not associated with a Contact. Think of them like to-do items.” |  |
| Action Status | Checkbox | | User selects checkbox to identify the action as complete |  |
| Edit Action | Icon | | Associated with the action in the sidebar and timeline |  |
| Delete Action | Icon | | Associated with the action in the sidebar and timeline | Alert: “You’re about to delete this action. Are you sure you want to delete?”  Buttons: “Delete Action” and “Cancel” |
| Next Action | Icon | | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |
| Previous Action | Icon | | If more Actions exist than can be displayed, then use a carousel to page through other Actions |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None