Dashboard

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# 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 |  |  |
| **Metrics** | | | |
| New Contacts | Link | 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 |  |
| Engaged Contacts | Link | Contacts engaging with content in the past 30 days. |  |
| Percentage Change in Engaged Contacts | Text | The percentage change in Engaged Contacts between the current and previous 30-day periods |  |
| Touched Contacts | Link | Contacts touched in the past 30 days. |  |
| Percentage Change in Touched Contacts | Text | The percentage change in Touched Contacts between the current and previous 30-day periods |  |
| Tours | Link | If Tours is active  Contacts toured in the past 30 days. |  |
| Percentage Change in Tours | Text | If Tours is active  The percentage change in Tours between the current and previous 30-day periods |  |
| Opportunities | Link | New opportunities created in the past 30 days. |  |
| Percentage Change in New Opportunities | Text | The percentage change in New Opportunities between the current and previous 30-day periods |  |
| **Bar Chart** | | | |
| Value | Bar & Tooltip | Value of selected metric for each day as displayed in a bar chart  Display as bar  Also display as text within a tooltip active on-hover or selection |  |
| Date | Text | Date associated with each day in the bar chart |  |
| **Details** | | | |
| Name | Link | Applies to these metrics:   1. New Contacts 2. Engaged Contacts 3. Touched Contacts 4. Tours   Full name of Contact and linked to the record |  |
| Phone Number | Text | Applies to these metrics:   1. New Contacts 2. Engaged Contacts 3. Touched Contacts 4. Tours   Primary phone number |  |
| Phone Number Type | Text | Applies to these metrics:   1. New Contacts 2. Engaged Contacts 3. Touched Contacts 4. Tours   Displayed adjacent to the Phone Number |  |
| Email | Link | Applies to these metrics:   1. New Contacts 2. Engaged Contacts 3. Touched Contacts 4. Tours   Primary email address |  |
| Lead Source | Text | Applies to New Contacts |  |
| Engagements | Text | Applies to Engaged Contacts  Total number of engagements for each Contact over the 30-day time period  Engagements include opens, clicks, web visits, and page views |  |
| Touch Points | Text | Applies to Touched Contacts  Total number of touches for each Contact over the 30-day time period  Touches include calls, emails, texts, meetings, and tours |  |
| Opportunity | Text | Applies to Opportunities |  |
| Potential | Text | Applies to Opportunities |  |
| Probability | Text | Applies to Opportunities |  |
| Stage | Text | Applies to Opportunities |  |
| People | Text | Applies to Opportunities |  |
| **Calendar and List** | | | |
| Meetings | Text | Applies to Calendar and List views |  |
| Tours | Text | Applies to Calendar and List views |  |
| Reminders | Text | Applies to Calendar and List views |  |
| Campaigns | Text | Applies to Calendar  Display scheduled Campaigns |  |

**Actions or Controls**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | | Validation |
| Showing all [calendar objects] | | Dropdown | | Display as: “Showing all [calendar objects]  Calendar objects include:   1. All 2. Campaigns 3. Meetings 4. Tours 5. Reminders |  |
| Day | Icon | | Changes calendar view per selection | |  |
| Week | Icon | | Changes calendar view per selection | |  |
| Month | Icon | | Changes calendar view per selection | |  |
|  |  | |  | |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Contact | Link |  |
| Add Campaign | Link |  |

**Exceptions**

None

**Notes and Issues**

None