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** | | | | |
| Title | Text | New = New Contacts by Day  Engage = Contacts Engaging by Day  Touched = Contacts Touched by Day  Tours = Contacts Toured by Day  Opportunities = New Opportunities by Day | |  |
| 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 | |  |
| **My Actions** | | | | |
| Action | Text | | Display 3-5 Actions (the number depends upon available space and/or what works well to balance the UI) |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Number Toggle | Button | | Default view  If selected, display metrics as numbers  Both Number and Percent may be selected at the same time  Remember User’s selection for future sessions |  |
| Percent Toggle | Button | | If selected, display metrics as percent-change  Both Number and Percent may be selected at the same time  Remember User’s selection for future sessions |  |
| New Tooltip | Tooltip | | “New contacts created in the past 30 days, and the percent change from the previous period.” |  |
| Engaged Tooltip | Tooltip | | “Contacts engaging with content in the past 30 days, and the percent change from the previous period.” |  |
| Touched Tooltip | Tooltip | | “Contacts touched by users in the past 30 days, and the percent change from the previous period.” |  |
| Tours Tooltip | Tooltip | | “Contacts toured in the past 30 days, and the percent change from the previous period.” |  |
| Opportunities Tooltip | Tooltip | | “New opportunities created in the past 30 days, and the percent change from the previous period.” |  |
| 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 | |  |
| 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**

1. Initial state of Dashboard shows Metrics and Calendar
2. Percent-change, description of metric, graph and details are shown once a metric is selected