

Homepage Requirements

1. Customer vs Product: Total Customers per Product

- **Component:** Bar Chart / Pie Chart
- **Data Points:**
 1. Product Names
 2. Total Number of Customers for each Product

2. State vs Customer vs Product

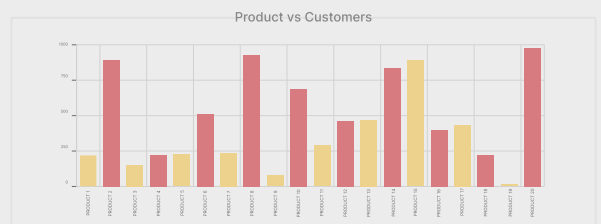
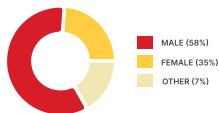
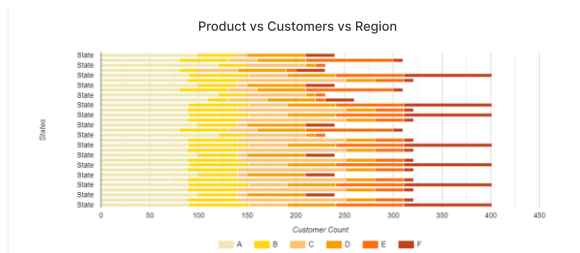
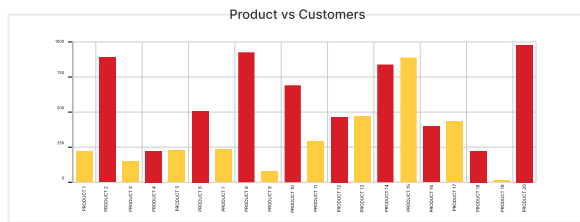
- **Component:** Interactive US Map with Popups
- **Data Points:**
 1. States
 2. Total Customers per State
 3. Products per State
- **Popup Details:**
 1. Total Customers
 2. Yearly Customer Trend (Line Chart)
 3. Product Division (Pie Chart)

3. Gender Representation

- **Component:** Pie Chart
- **Data Points:**
 1. Gender (Male, Female, Other)
 2. Number of Customers per Gender

4. Age Representation

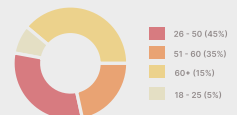
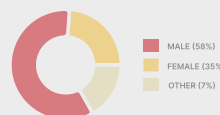
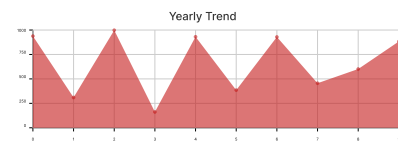
- **Component:** Bar Chart
- **Data Points:**
 1. Age Groups (18-25, 26-50, 51-60, 60+)
 2. Number of Customers per Age Group



State A

Total Customer Count: 670

Total Product Count: 670



Product Analytics

Pre-Filter/Existing Element

- **Component:** US Map
- **Data Points:**
 1. Regions
 2. Customer Volume per Region

Filters

1. **Search by Product**

Component: Search Bar
2. **Filter by Product Type + Subtype**

Component: Dropdown Menu

Options: e.g., Trade, Annuity, Stocks, Intermediate
3. **Select Category**

Component: Dropdown Menu

Options: e.g., IRA, Foreign, etc

Graphs

1. **Total Customers for the Product**

Component: Bar Chart
2. **Region vs Customers for the Product**

Component: Heat Map / Bar Chart
3. **Yearly Customer Trend for the Product**

Component: Line Chart
4. **Customer vs Age Group for the Product**

Component: Bar Chart
5. **Top 3 Regions**

Component: List / Bar Chart

Customer Navigation

Pre-Filter/Existing Element

- **Component:** Line Chart
- **Data Points:** Yearly Customer Trend

Filters

1. **Filter by Source of Wealth**

Component: Dropdown Menu

2. **Filter by Regions**

Component: Dropdown Menu / Map Selection

3. **Filter by Occupation**

Component: Dropdown Menu

Post-Filter Details

1. **Total Customers in the Category**

Component: Number Display

2. **Product Split**

Component: Pie Chart

3. **Top 3 Leading Occupations**

Component: List / Bar Chart

4. **Top 3 Regions**

Component: List / Bar Chart