Developer Document: KPI Dashboard Implementation

# Components

The dashboard will be a pcf control hosted by another team.

We will use the KpiCard component (as defined in Figma and props provided).

# Metrics to Implement

1. Lead to Opportunity Conversion Ratio  
 - Numerator: Count of opportunities created in period.  
 - Denominator: Count of leads in the same period.  
 - FetchXML query to calculate counts.  
  
2. Revenue from Opportunities Closed as Won  
 - Sum of revenue field (e.g., estimatedvalue or actualvalue) where status = Won.  
 - FetchXML query with aggregation.

# Time Filter Implementation

Time filters supported: Last Week, Last Month, Last 3 Months.  
- Use createdon field in FetchXML.  
- Apply operators: 'on-or-after' and 'on-or-before'.  
- Placeholders will dynamically resolve to the selected period.

# KpiCard Props Usage

- title: Metric name (e.g., 'Lead to Opportunity Conversion Ratio').  
- value: Computed metric value from FetchXML.  
- valueFormatter: Format as percentage (ratio) or currency (revenue).  
- trend: Computed by comparing current period vs previous period.  
- loading: Show spinner while data is being fetched.  
- error: Show message if FetchXML query fails.

# Example FetchXML Placeholders

For Conversion Ratio:  
<fetch aggregate='true'>  
 <entity name='lead'>  
 <attribute name='leadid' alias='lead\_count' aggregate='count' />  
 <filter>  
 <condition attribute='createdon' operator='on-or-after' value='@StartDate' />  
 <condition attribute='createdon' operator='on-or-before' value='@EndDate' />  
 </filter>  
 </entity>  
</fetch>  
  
Revenue from Opportunities:  
<fetch aggregate='true'>  
 <entity name='opportunity'>  
 <attribute name='actualvalue' alias='revenue' aggregate='sum' />  
 <filter>  
 <condition attribute='statecode' operator='eq' value='Won' />  
 <condition attribute='createdon' operator='on-or-after' value='@StartDate' />  
 <condition attribute='createdon' operator='on-or-before' value='@EndDate' />  
 </filter>  
 </entity>  
</fetch>

# Sample FetchXML Queries

## 1. Lead to Opportunity Conversion Ratio

This query counts total leads and total converted opportunities within the selected time range.

Example (Last Month - Leads Created):  
<fetch distinct="false" aggregate="true">  
 <entity name="lead">  
 <attribute name="leadid" aggregate="count" alias="total\_leads" />  
 <filter type="and">  
 <condition attribute="createdon" operator="last-month" />  
 </filter>  
 </entity>  
</fetch>  
  
Example (Last Month - Converted Opportunities):  
<fetch distinct="false" aggregate="true">  
 <entity name="opportunity">  
 <attribute name="opportunityid" aggregate="count" alias="converted\_opps" />  
 <filter type="and">  
 <condition attribute="createdon" operator="last-month" />  
 <condition attribute="opportunityratingcode" operator="eq" value="3" /> <!-- Qualified -->  
 </filter>  
 </entity>  
</fetch>

## 2. Revenue from Opportunities Closed as Won

This query sums the estimated revenue of opportunities where state = Won within the selected time range.

Example (Last 3 Months):  
<fetch distinct="false" aggregate="true">  
 <entity name="opportunity">  
 <attribute name="actualvalue" aggregate="sum" alias="total\_revenue" />  
 <filter type="and">  
 <condition attribute="actualclosedate" operator="last-x-months" value="3" />  
 <condition attribute="statecode" operator="eq" value="1" /> <!-- Won -->  
 </filter>  
 </entity>  
</fetch>