



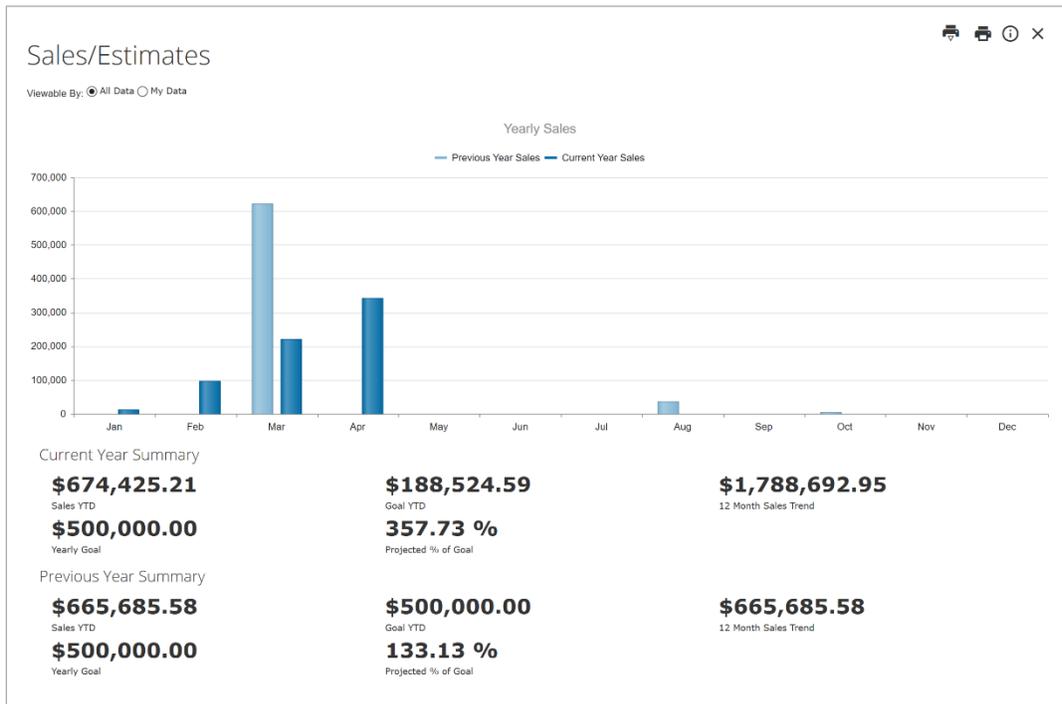
Sales Dashboard

This document will provide you with a more detailed understanding of the dashboards and the required information for an accurate population of information on the dashboards. Each dashboard panel has an information icon, this is provided on each panel with a description of what is included on the displayed panel. Additional icons will be provided to the user on select dashboards, hover over the icon to display the definition of the icon function. Click on the icons to perform the action or function. *****Employee Permissions will apply with the function/action of icons such as Print and Export. The Administrator manages these permissions within the Employee information in your database. Employee Permissions are located at Settings→ System Setup→ Employee, Permissions.***

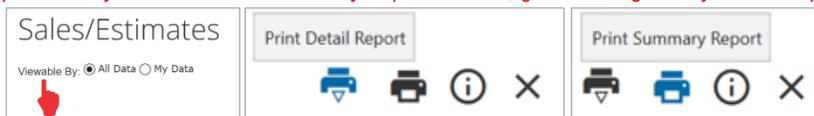
Sales Dashboard

Sales/Estimates

This dashboard shows sales year to date for all sales by month. It is calculated using all jobs that have an WA/Contract Signed date in the Job Snapshot for the current year and the Estimate values used in the Financials are based on the date of the estimate.



This panel provides the user with the option to view All Data within the database or only the individual who is logged in (My Data). The user has the ability to print reports from this screen, a Detail Report or a Summary Report. *****Printing reports is an employee permission provided by the Administrator. To adjust permissions, go to Settings→ System Setup→ Employees, Permissions***



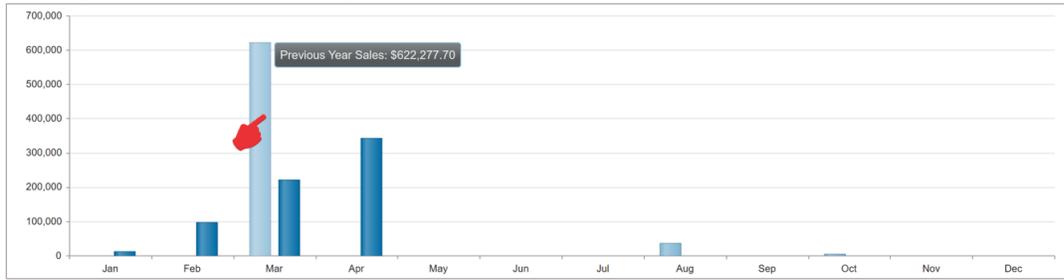
The user has the option of choosing Previous Year or Current Year Sales by clicking on their preference.





Sales Dashboard

Hovering over the chart column will provide the user with the popup with the sales value.

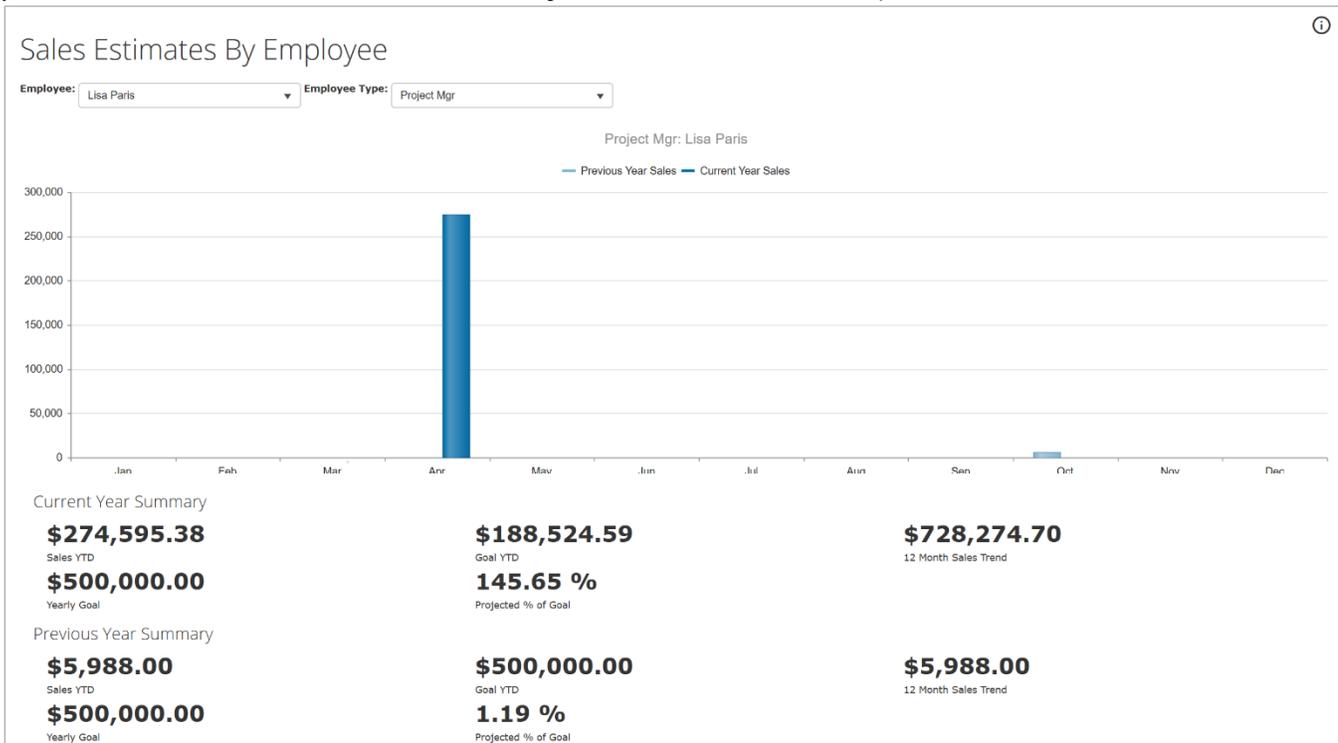


The Current Year and Previous Year summaries provide the user with the Sales Year to Date, Yearly Goal, Goal Year to Date, Projected Percentage of the Goal, and the 12 Month Sales Trend. ***The Yearly Goal is set in the Employee Personal Information by the Administrator. To set this goal, go to Settings→ System Setup→ Employee, Personal Information*

Current Year Summary		
\$274,595.38 Sales YTD	\$170,765.03 Goal YTD	\$804,015.27 12 Month Sales Trend
\$500,000.00 Yearly Goal	160.80 % Projected % of Goal	
Previous Year Summary		
\$5,988.00 Sales YTD	\$500,000.00 Goal YTD	\$5,988.00 12 Month Sales Trend
\$500,000.00 Yearly Goal	1.19 % Projected % of Goal	

Sales Estimates by Employees

This shows sales year to date and previous year sales for the selected employee and employee type on the job, it is broken down by sales by month. It is calculated using any jobs that the selected employee is listed in the selected employee type and has an WA/Contract Signed date in the current year. The values used are based on the WA/Contract Signed date recorded in the Job Snapshot of the Job.





Sales Dashboard

To select Employee and Employee Type, click inside of the dropdown to select.

****The Administrator may create new Employees at Settings→ System Setup→ Employees**

****The Administrator manages the Employee Type at Settings→ System Setup→ Settings, Titles/Positions**

Sales Estimates By Employee

Employee: Employee Type:

The user may opt to toggle between Previous and Current Year Sales, click on the selected to display information

Project Mgr: Lisa Paris

Previous Year Sales
 Current Year Sales

Hover over the graph to display the information in each column of the graph.



The user is provided an “at a glance” of the Current and Previous Year Summaries for their convenience.

Current Year Summary		Previous Year Summary	
\$274,595.38	\$188,524.59	\$5,988.00	\$500,000.00
Sales YTD	Goal YTD	Sales YTD	Goal YTD
\$500,000.00	145.65 %	\$500,000.00	\$5,988.00
Yearly Goal	Projected % of Goal	Yearly Goal	12 Month Sales Trend

Top 10 Referrals

This shows the Top 10 Referrals by company, this represents all your jobs that are referred and will show the number that are not sold and in production. Source of Referral *must* be listed in Additional Contacts on each job for the job to be included in these calculations.





Sales Dashboard

The user may opt to view All Data or only their Data.

Top Referral Sales

Viewable By: All Data My Data

The Top 10 Referrals information is gathered for the user and displayed in graphs for their convenience. Hovering over the graphs with the cursor will provide the information in the colors and/or columns in the graphs.



The dashboard provides a list of the Top Referral Companies, listing the number of Jobs referred, the % of Total represents the percentage of all jobs received, total Jobs Not Sold, In Production and total monetary value of the jobs.

Referral - Company	Job	% of Total	Not Sold	In Prod.	Sales
Lulu Hen - Chickencoop Agency	7	13.73 %	0	5	\$124,318.28
TC Rooster - Hen House Agency	4	7.84 %	0	0	\$0.00
Code Blue - TPA/Preferred Pro...	3	5.88 %	1	1	\$0.00
Oceanside Insurance - Oceansi...	3	5.88 %	0	0	\$0.00
Internet/Web Search - Other R...	2	3.92 %	0	2	\$264,072.16
Bryce Combs - Fix-it Up Plumbing	2	3.92 %	0	3	\$158,536.32
Rich Bailey - USAA	2	3.92 %	0	2	\$83,455.62
Billboard - Other Referral So...	2	3.92 %	0	2	\$31,064.42
Ashley Stewart - State Farm	2	3.92 %	0	3	\$18,601.50
Liberty Mutual - Liberty Mutual	2	3.92 %	0	2	\$600.00
Totals:	29	56.86 %	1	20	\$680,648.28

Page 1 of 1 | 1 - 10 of 10 items