

ENHANCED DASHBOARDS FOR SAGE SALESLOGIX LAN BY PROFILING SOLUTIONS



Version 1.0
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SalesLogix Dashboards enable a Sales Representative or Manager to start their day by looking at the elements most important to them: their daily activities and past due items, pipeline and closed deals. With the drill down capability, one can dissect the information to analyze the relationships and variables.

The Profiling Solutions Enhanced Dashboards takes a different approach. We do not want end-users drilling into relationships or becoming analysts. Instead, representatives need to understand and benchmark their performance in order to be motivated. Good representatives are competitive by nature strive to improve their performance and the enhanced Profiling Solutions Dashboard provides that feedback.

The bundle was written in the SalesLogix Architect and completely customizable to your system.

MANAGEMENT NOTE

On the top right, the administrator or a user, given sufficient permissions, can leave a message for Sales Team. Sales Managers can leave personalized messages for team members who report to them.

The screenshot shows the 'Sales Dashboard' interface. At the top, there are navigation tabs: 'Activity Summary', 'Activity Compare', 'Opportunity Compare', 'Today's Schedule', 'Past Due Activities', and 'Top 10 Opps'. The 'Activity Summary' tab is active. Below the tabs, there is a 'Filter By' dropdown set to 'Administrator' and a 'Time Period' dropdown set to 'Week'. The main content area displays a table comparing 'This Year' and 'Last Year' performance across four weeks. The table has columns for 'New Opps', '\$', 'Calls', 'Meetings', 'Emails', 'To Dos', and 'Totals'. All values in the table are 0. To the right of the table, there is a message box titled 'Profiling Solutions new Dashboard.' with a list of 7 items: 1) Create global message...edit: options limited to admin, 2) Performance Metrics over time (user, team, all), 3) Activity Comparison over time, 4) Opportunity Comparison over time or w/in a group, 5) Top 10 Opportunities, 6) Simplified Graphs, and 7) Expand number of user to 30. At the bottom right of the message box, there are 'Line: 8 Col: 31', 'Modified', 'Spell Check', and 'Save' buttons.

	This Year							Last Year						
	New Opps	\$	Calls	Meetings	Emails	To Dos	Totals	New Opps	\$	Calls	Meetings	Emails	To Dos	Totals
Current Week	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Last Week	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Third Week	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Fourth Week	0	0	0	0	0	0	0	0	0	0	0	0	0	0

ACTIVITY SUMMARY

Defaulted to the currently logged in user, but selectable for a different user, team or Everyone; the activity summary provides a time series snapshot of the sales effort, as measured by completed history, and volume added to the funnel.

ACTIVITY COMPARE

Defaulted to the display the individuals peers (the managers direct reports or other users who share the same manager), this snapshot allows the user to compare their effort to those of their peers. The content measures the level of effort by the sales representatives: how many communications occurred, the unique number of accounts contacted (touched) and the contributions made to maintaining/enhancing the system. When combined with Opportunity Compare, one can demonstrate the correlation between effort and results.

Sales Dashboard

Activity Summary | Activity Compare | Opportunity Compare | Today's Schedule | Past Due Activities | Top Opps

Current Quarter

Drag a column header here to group by that column

User Name	Calls	Meetings	Emails	ToDos	Activity Totals	Touched	Updated Accts	New Accts	New Contacts
Administrator	0	1	0	0	1	1	0	0	0
Ed Martinez	1	0	0	0	1	1	0	0	0

OPPORTUNITY COMPARE

Defaulted to the display the individuals peers (the managers direct reports or other users who share the same manager), this snapshot allows the user to compare the sales volume and pipeline versus their peers. This dashboard includes a Group filter for analysis of targeted programs.

Sales Dashboard

Activity Summary | Activity Compare | Opportunity Compare | Today's Schedule | Past Due Activities | Top Opps

Group: All Opportunities

group by that column

	# Won	\$ Won	# Lost	\$ Lost	# New	\$ New	Opps < 30	Opps 30 - 60	Opps 60 - 90
Current Month	22	\$12,057,062.00	10	\$8,881,572.00	0	\$0.00	\$0.00	\$422,250.00	\$0.00
Current Quarter	11	\$4,130,959.00	10	\$814,500.00	0	\$0.00	\$283,400.00	\$733,940.00	\$5,387,920.00
Current Year	25	\$10,715,592.80	24	\$786,681.00	0	\$0.00	\$1,379,400.00	\$440,370.00	\$1,456,605.30
Last Week	70	\$12,751,668.19	28	\$1,527,062.20	0	\$0.00	\$918,650.00	\$866,596.00	\$1,817,980.00
Last Month	13	\$1,744,420.12	11	\$251,347.00	0	\$0.00	\$643,081.00	\$1,732,590.00	\$1,851,820.40
Last Quarter	20	\$2,480,779.00	11	\$2,095,486.50	0	\$0.00	\$0.00	\$113,797.20	\$0.00
Date Range	11	\$4,834,481.00	10	\$92,178.00	0	\$0.00	\$0.00	\$349,500.00	\$250,000.00
Group	93	\$35,905,499.81	20	\$1,431,075.00	0	\$0.00	\$522,140.00	\$491,574.00	\$7,256,936.00
Ed Martinez	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00	\$3,879.00	\$3,632,750.00
Georgine Ekels	0	\$0.00	0	\$0.00	0	\$0.00	\$1,548,192.00	\$1,917,213.30	\$1,127,000.00
Ken Dryden	11	\$2,566,728.00	11	\$41,375.00	0	\$0.00	\$0.00	\$547,720.00	\$674,550.00
Kim Lee									
Lee Hogan									
Linda Walsh									
Pro Source									
Rajeev Mitra									

TOP 10 OPPS

This tab provides a list of the 10 opportunities for the user. Expand the number of opportunities or add a new tab for new Leads or Support Tickets. We want to make information obvious and available for the user.

Sales Dashboard

Activity Summary | Activity Compare | Opportunity Compare | Today's Schedule | Past Due Activities | Top Opps

Display By: Northeast Display Count: 10

Drag a column header here to group by that column

Owner	Account Manager	Description	Account	Type	Sales Potential	Estimated Close
Northeast	Barret, Dan	Burke Drill Company-Phase1	Burke Drill Company	Product	\$3,454,970.00	02/19/2011
Northeast	Barret, Dan	E.F. Inc.-Phase1	E.F. Inc.	New	\$1,048,500.00	04/23/2011
Northeast	Barret, Dan	Consumer West-Phase1	Consumer West	New	\$924,100.00	11/20/2010
Northeast	Barret, Dan	American Electric Associates-P	American Electric Associates	New	\$509,700.00	02/19/2011
Northeast	Barret, Dan	Trans Fryer-Phase1	Trans Fryer	New	\$374,750.00	03/23/2011
Northeast	Barret, Dan	Account Graphics-Phase1	Account Graphics	New	\$335,600.00	01/21/2011
Northeast	Barret, Dan	Ernst Products-Phase1	Ernst Products	New	\$299,800.00	01/21/2011
Northeast	Barret, Dan	Casein Products-Phase1	Casein Products	New	\$213,500.00	12/21/2010
Northeast	Barret, Dan	Apex Industrial Washer & Dryer	Apex Industrial Washer & Dryer	New	\$69,900.00	12/21/2010
Northeast	Barret, Dan	Fido Video-Phase1	Fido Video	New	\$65,520.00	01/19/2011

OTHER ENHANCEMENTS

The default data points displayed is 5. We have expanded this number 30 before being group as "Other".

Instead of showing Two Graphs per metric, we have simplified it to display just one but expanded for greater detail.

Supports a global message and message that a manager can set per user.

SUPPORTED VERSIONS

Sage SalesLogix 7.5.2 LAN Client and greater

Sage SalesLogix 7.5.2 Web Client and greater -- **COMING SOON**

FOR MORE INFORMATION AND PRICING

Ron Fisher @ 404.525.8003x2201 or via email @ rfisher@profilingsolutions.com

David Newberry @ 251.382.8133 or via email @ dnewberry@profilingsolutions.com

Visit us on the web @ www.profilingsolutions.com