Dashboards in SalesNexus

WHY THEY MATTER AND HOW TO CREATE THEM

salesnexus

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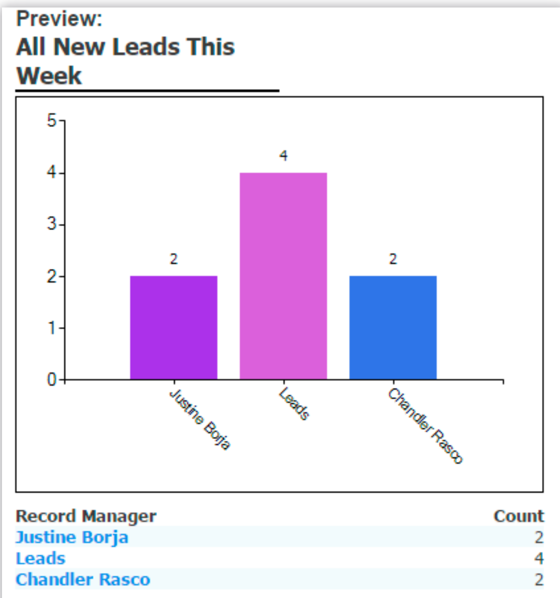
What are dashboards?

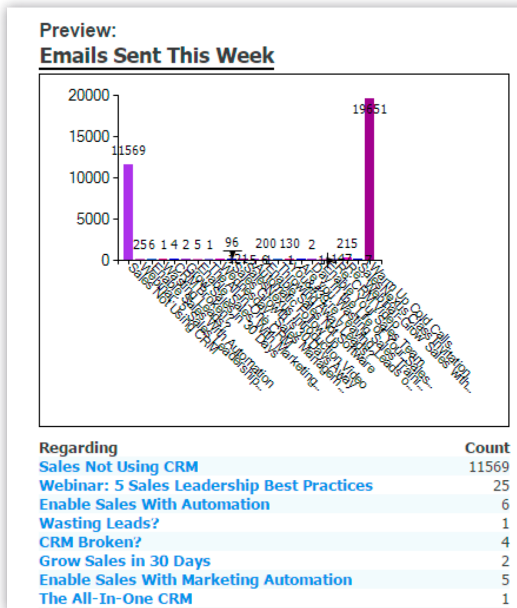
Dashboards are a way to track how your business is doing in areas that are important to you. You can track if Sales Staff are meeting their weekly goals, where are your leads coming from each month or how much is in your pipeline for this quarter.

Samples of dashboards

To give you an idea of what you can do, here are some sample dashboards:



Record Manager	Count
Justine Borja	2
Leads	4
Chandler Rasco	2



Regarding	Count
Sales Not Using CRM	11569
Webinar: 5 Sales Leadership Best Practices	25
Enable Sales With Automation	6
Wasting Leads?	1
CRM Broken?	4
Grow Sales in 30 Days	2
Enable Sales With Marketing Automation	5
The All-In-One CRM	1

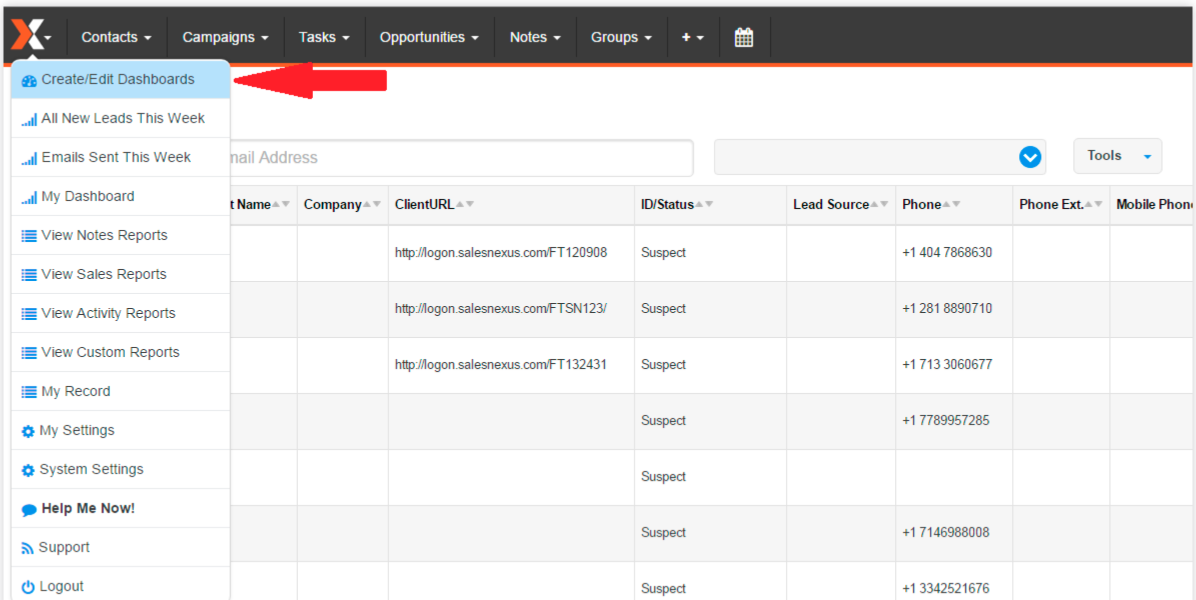
When to use dashboards

Dashboards are at the 30,000 foot level, you see one number per value. Dashboards are a snapshot in time. This allows you to see where you need to drill down into the details and exactly what you need to look at more closely. By having your sales reps see their dashboards exactly how you see them, there is no question if a goal was met. The time frame on dashboards are set to periods of time not a date range, this allows you to compare this quarter to last quarter, this month's Dashboards give you a 30,000 foot view on what's going on in your business and allow you to keep yourself and your team focused on the metrics that matter most. With SalesNexus, your dashboard can start at the highest level and then you can drill down to more specific information about an individual customer.

Be sure to create dashboards for your team that allow them to watch the numbers that matter most to you. Dashboards can be based on contacts, activities, notes or campaigns. Best of all, they're easy to change so, play around with them and explore to find what works best for you and your team.

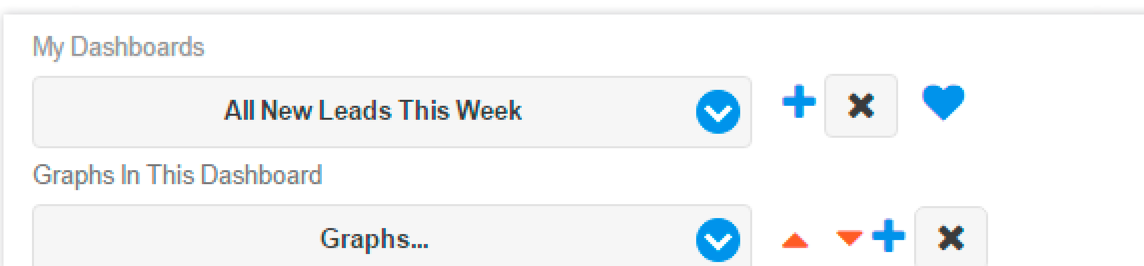
To get started on Your Dashboards

Click on the SalesNexus logo at the upper left hand part of the screen, you can then click on the first option in the dropdown where it says "Create/Edit Dashboards".

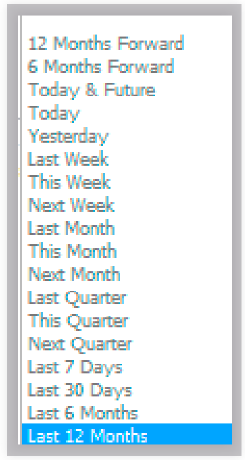


Sections of Your Dashboards

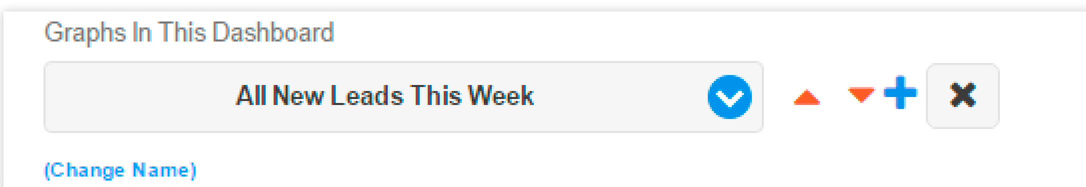
Graphs in This Dashboard

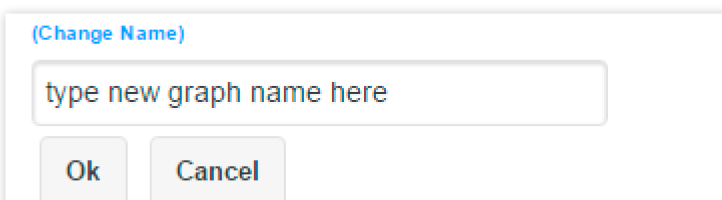


The dropdown in “My Dashboards” shows you the dashboards that are already created. It also gives you the control to move your dashboard to the front or back of the list. You can use the Blue Plus to create a new dashboard and the black X to delete one. You can also select an existing dashboard to make changes to it.



One of the changes can be to simply rename the dashboard, click Change Name and put in the new name.

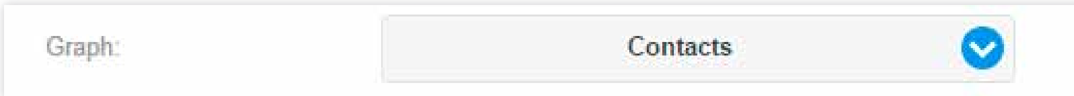




Name

This shows you the name of existing dashboards you have selected or you can put in a name for a new dashboard.

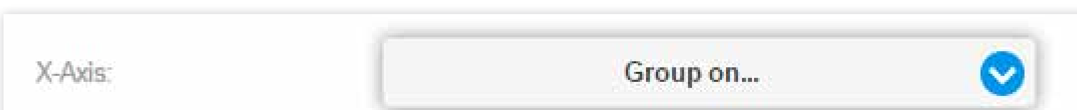
Graph



These areas are found under the Graph dropdown. They correspond to the tables in your database:

- **Contact**—This is where you find information for any of the contacts fields; where you got the lead, what their status is, how many new leads does each rep have.
- **Activity**—This will tell you which reps are documenting their client touches, if contacts are not getting touches on a regular base for both closed and open tasks.
- **Notes**—This will let see just the closed tasks or sales.
- **Sales**—This gives you a pipeline of the total pending sales for a month or a quarter. You can tell which rep is bringing in the most revenue or what stage are your sales getting stuck at.
- **Campaigns**—This allows you to compare your open or click rate by subject line.
- **Campaigns R3 Format**—This allows you to compare your open or click rate by subject line, campaign name, campaign, send date or template name.
- **Logins**—This allows you to see how often a user is login into the database. If they don't login they can't help your business.

X-Axis

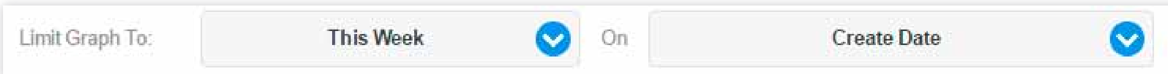


For each of the areas under Graph, you get a set of Dropdown choices that allow you to pick the field you want to show on the X axis of your dashboard. The X axis will run across the base of your dashboard.

The field choices are different for each table. As we start to build dashboards we will list out the commonly used ones for each area and what it will show you.

Group by gives you the option to pick smaller ranges within a large time frame. This gives you multiple points on the graph instead of one large number.

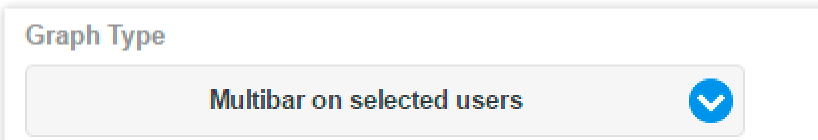
Limit Graph To



This is the area you pick the time frame you want to display. This is not a date range, that allows your dashboard to continue being useful without having to recreate it.

Graph Type

This allows you to select the type of Graph you would like displayed.



Basic Graph—This will display a simple bar chart—Used to show variables in the same field.

Multibar on selected users—This will group the data by the users selected in the list below. Used to compare users work on the same field. This allows you to see how they measure against each other. Each user will display in a different color so that you can see the same variable for each one.

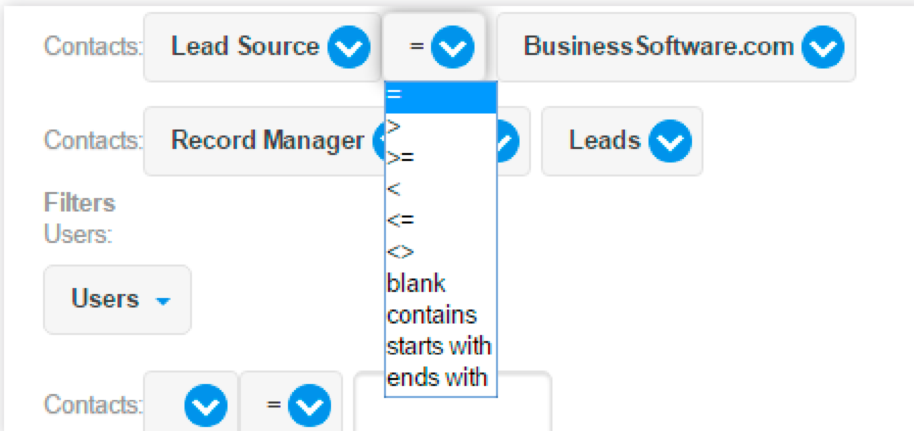
Multibar on drop-down list—This will group the data by the field values selected from the list in the dropdown. You can pick them all or just a few-Used to compare how one item in a field is measuring up to another item in the same field.

Trending—This will show a trending line for each of the two fields selected. Use this to compare the two items over a longer period of time. By using a date for the X-Axis you get more data points to compare.

Filters

Filters will vary depending on the type of graph you pick, but the Filter for Users is always an option.

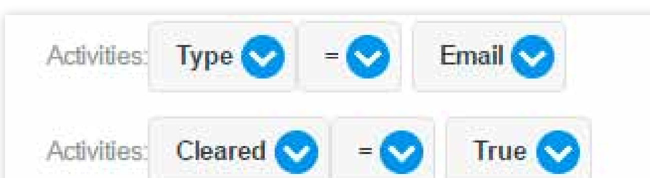
If you pick the **Contacts** as the Graph table, you will get three additional filters that can have any contact fields in them. The center drop down will contain the option of how to filter the information they are:



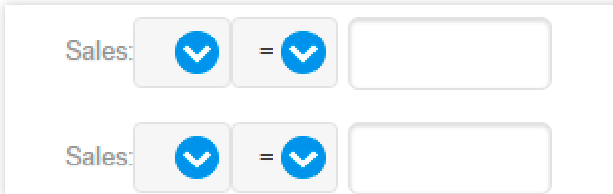
= Must match exactly
> Greater than
>= Greater than or equal to
< Less than
<= Less than or equal to
<> Is not Equal to Blank—no value in the field
Contains—is found in any part of the field Starts with—Must start with the value Ends with—Must end with the value

If you pick a field with a dropdown option, you can pick from those options.

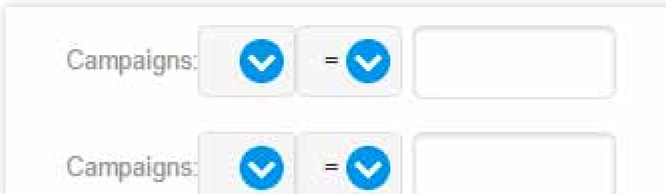
If you pick **Activity** as the Graph table, you get two filter lines from the activity table.



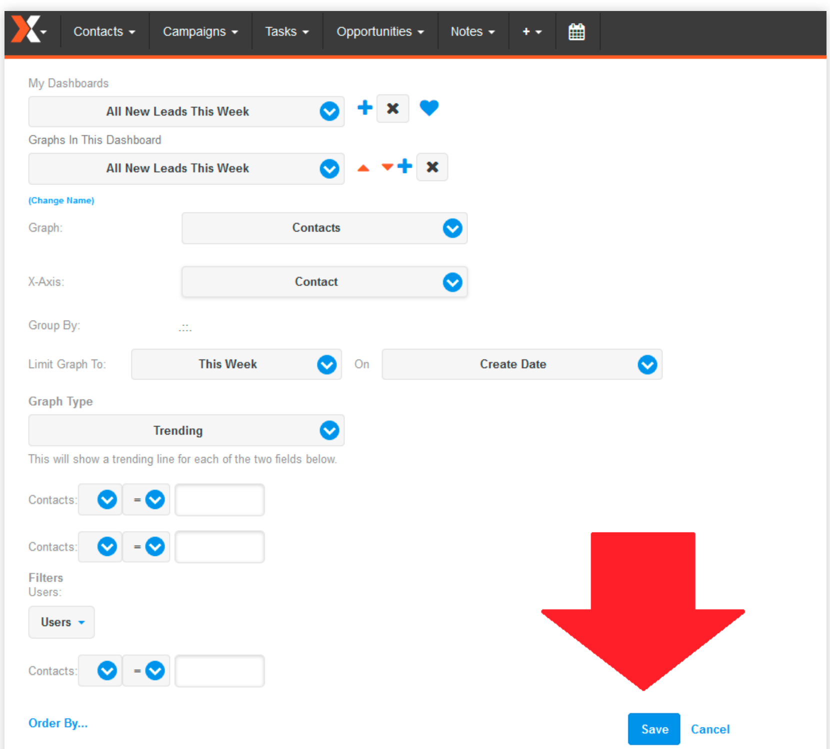
If you pick **Sales** as the Graph table, you get two filter lines from the Sales table.



If you pick **Campaigns** as the Graph table, you get two filter lines from the Campaign table.



Once you are done setting up your parameters, you can then click on the blue Save button to apply your parameters and have you dashboard created.



To view your dashboards at any time, you can click on the SalesNexus X logo at the upper left hand part of your screen, and choose “My Dashboard”.