ServiceAutopilot™

DASHBOARD

USER GUIDE

V2.5

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About the Service Autopilot Dashboard

All SA users have a basic Report Center Dashboard. Pro and Pro Plus Members can also customize their Dashboard, and create a custom analysis.

The Dashboard is a place where you can see visual representations of Report data at a glance. The tabs and panels are customizable so you can see exactly what information you want to see.

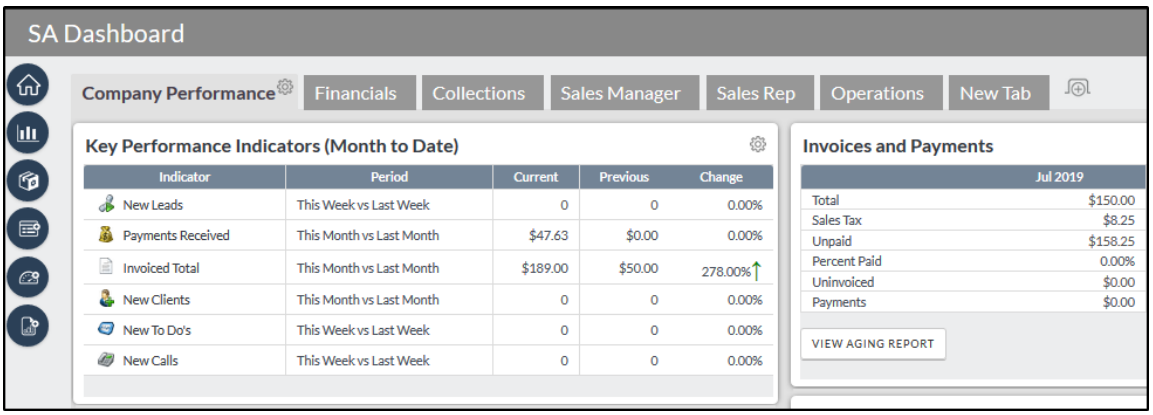
See the *Report Center User Guide* for information on setting up user rights for access to the Dashboard.

Open the Report Center Dashboard

Go to **Reports > Report Center** and click the **SA Dashboard** icon:

The SA Dashboard menu lets you access preset **Dashboard Panels** including visual elements from existing reports. When you create a new dashboard, or when you change tab settings, the Visual Gallery will display. You can search and sort all your visuals here.

On your Dashboard screen, you'll see all types of useful features and tracking tools. For example:



On this screen, you can see different tabs for information about your company, revenue, and Clients. You can add additional tabs for any category you would like. You can also re-name the existing tabs or add and remove panels. Many of the panels allow you to click on them for more detailed information.

The SA Dashboard contains the following elements:

Dashboard Panel Tabs – navigate through the various tabs to glance at relevant report visuals. In the screenshot above these are the tabs across the tops such as "Company Performance" and "Financials".

Tab Settings Icon – this is the cog icon at the top-right of each Dashboard Panel Tab. Choose from different setting options such as changing layout or renaming tab.

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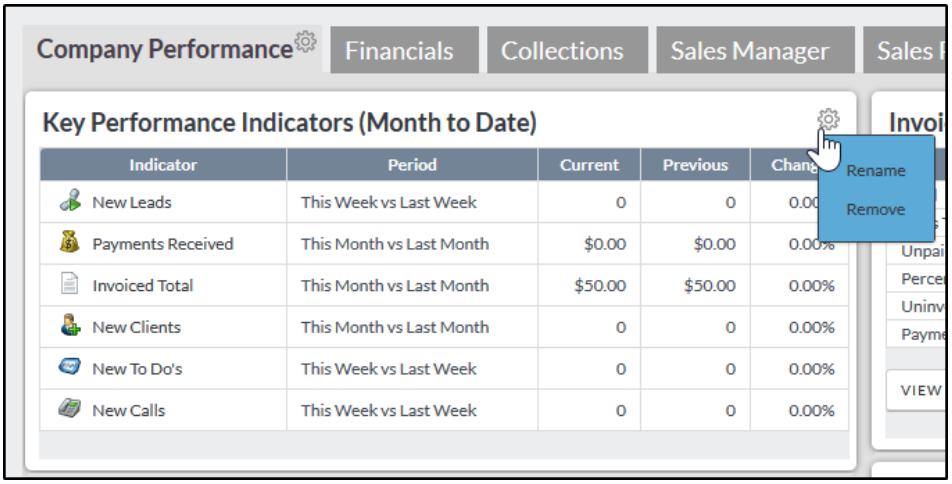
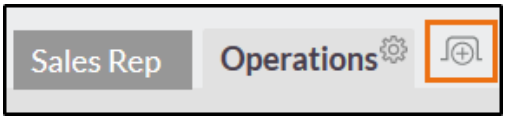
Visual Settings Icon – this is the cog icon at the top-right of each Dashboard panel. Choose to rename or remove report visual from dashboard panel:



New Tab Action Button – located at the far right of all existing tabs, use this to create a new dashboard panel tab and add content from the Visual Gallery:



"I can see paradise by the dashboard light"

--Meatloaf

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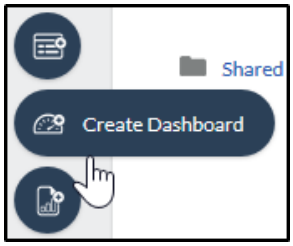
Create a Custom Dashboard

A dashboard is a collection of visuals (charts, gauges, and tables) that are placed into dashboard panels. Dashboards can show you a lot of information about your company at a single glance.

Follow these steps to create a new dashboard:

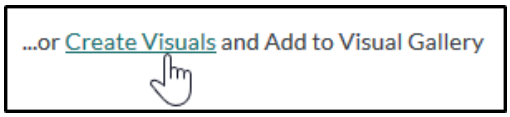
1. Go to **Reports > Report Center**.
2. Click **Create Dashboard**.



3. The Visual Gallery overlay will open over your new Untitled Dashboard. Click **Add** on any of options in the Visual Gallery. This will add your selection as a new panel in the dashboard.

   After you click **Add**, the button disappears and "Added" is displayed.

4. Click the **Create Visuals** link at the bottom of the overlay to add custom visuals to the dashboard.



5. Click **Done** to close the Visual Gallery.
6. Click on **Untitled Dashboard** to customize the name of the dashboard. This is the name that appears on the Report Center home page.
7. Click the gear icon on the New Tab (top left) and click **Rename Tab**, then type a name for the dashboard tab. You can have multiple tabs within a dashboard, each containing multiple visuals.
8. Click and drag your visual panels to rearrange them. Or you can rename and delete them from the gear icon located on the top right corner of each panel.
9. Click "**X**" on the top right to exit the dashboard.

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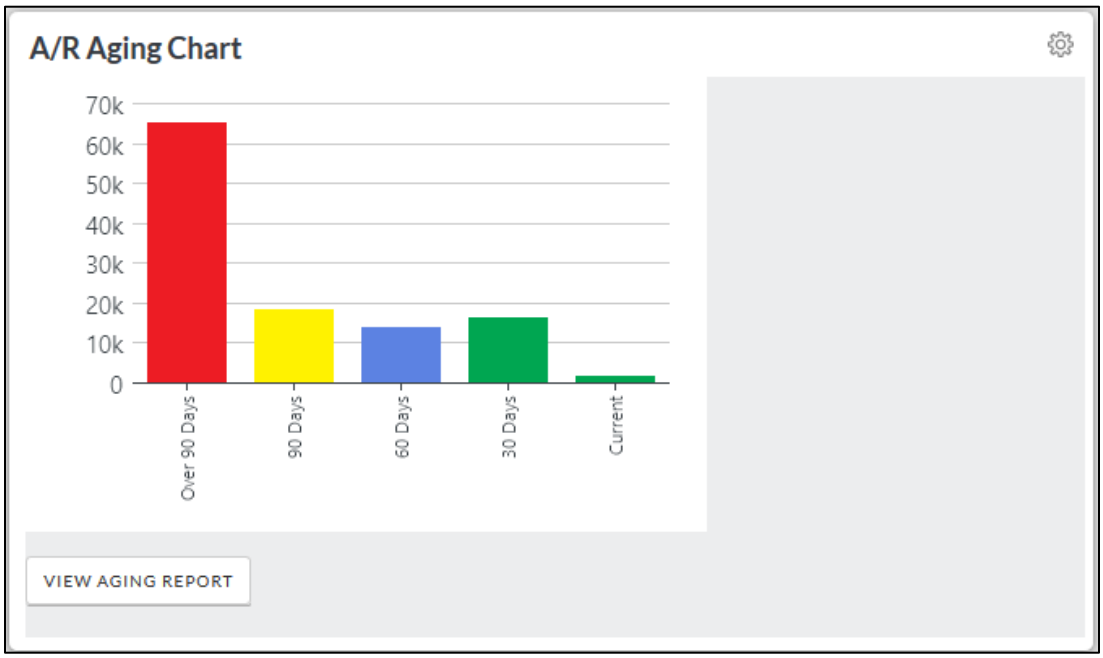
Dashboard Components

The following pages list the Dashboard components available.

A/R Aging Chart

A bar graph that represents the total dollar amount due based on the A/R aging panel. Each bar is based on a certain preset date filter.



- Click a bar to see a screenshot of the panel based on that date range. It is very similar to the A/R aging panel for client information. It also shows the invoice date, invoice number, and invoice total.
- You can print the screen or export the details to Excel.
- Click the “View Aging panel” link to go to the A/R aging panel.

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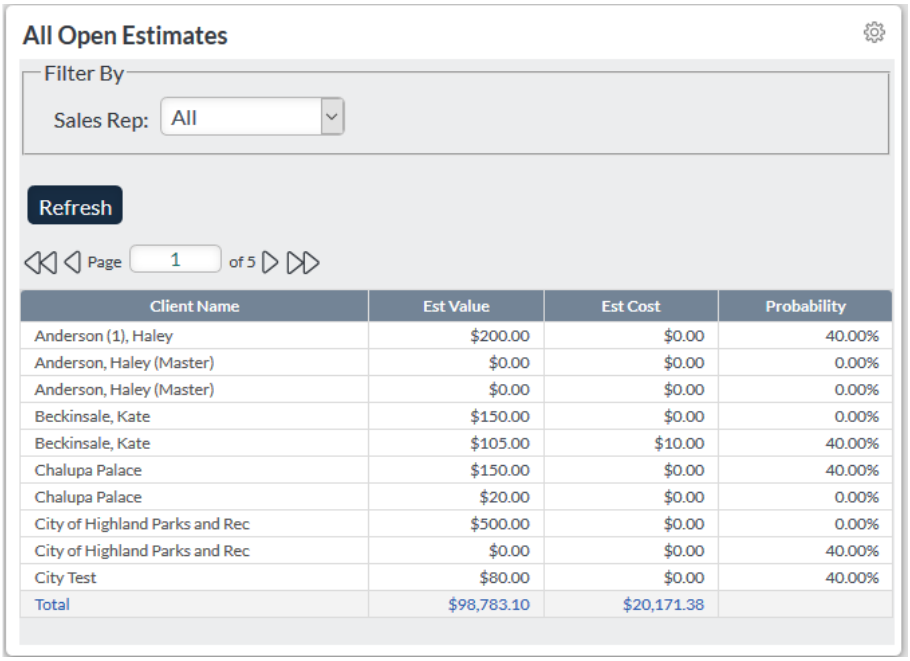
All Open Estimates

This panel shows your open estimates with “Draft” or “Sent” status. You can filter by Sales Rep.



Client Name	Est Value	Est Cost	Probability
Anderson (1), Haley	$200.00	$0.00	40.00%
Anderson, Haley (Master)	$0.00	$0.00	0.00%
Anderson, Haley (Master)	$0.00	$0.00	0.00%
Beckinsale, Kate	$150.00	$0.00	0.00%
Beckinsale, Kate	$105.00	$10.00	40.00%
Chalupa Palace	$150.00	$0.00	40.00%
Chalupa Palace	$20.00	$0.00	0.00%
City of Highland Parks and Rec	$500.00	$0.00	0.00%
City of Highland Parks and Rec	$0.00	$0.00	40.00%
City Test	$80.00	$0.00	40.00%
Total	$98,783.10	$20,171.38	

Categories

EST VALUE	Subtotal value of the estimate pre-tax.
EST COST	Combined cost of the estimate.
PROBABILITY	Generated based on the stage have set on the estimate and the probability percent set for those stages.

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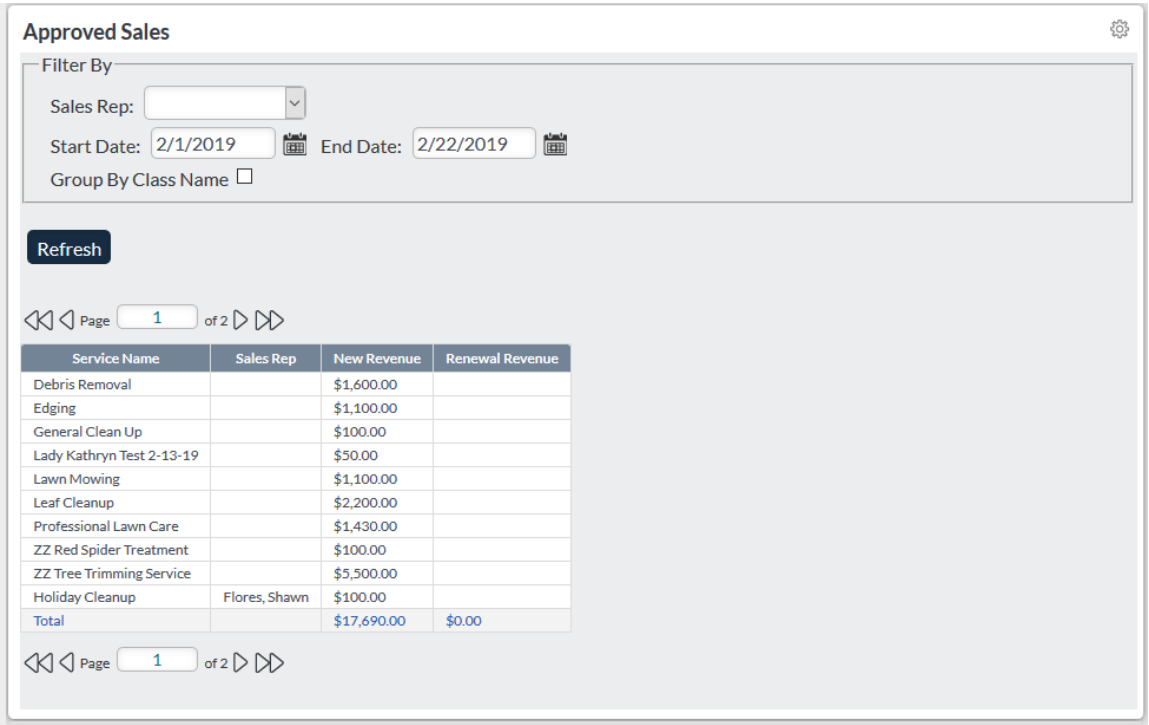
Approved Sales

This panel shows your approved sales by Sales Rep and date range filter.

If you select the “Group By Class Name” check box, this will group any classes linked to a service in your service settings. You must first enable this function in your service settings.



Service Name	Sales Rep	New Revenue	Renewal Revenue
Debris Removal		$1,600.00	
Edging		$1,100.00	
General Clean Up		$100.00	
Lady Kathryn Test 2-13-19		$50.00	
Lawn Mowing		$1,100.00	
Leaf Cleanup		$2,200.00	
Professional Lawn Care		$1,430.00	
ZZ Red Spider Treatment		$100.00	
ZZ Tree Trimming Service		$5,500.00	
Holiday Cleanup	Flores, Shawn	$100.00	
Total		$17,690.00	$0.00

Categories

Revenue is calculated based on the set rate for each service.

NEW REVENUE	This generates when a new service is scheduled for a client, but only when it is a new or first-time service. This is based on the job’s set rate on the master job, not the set rate in the service settings.
RENEWAL REVENUE	This is based on the package renewal status for a client. The amounts combine if the filter range grows. If under a contract, the set service rate will appear under new revenue, not the contract amount.

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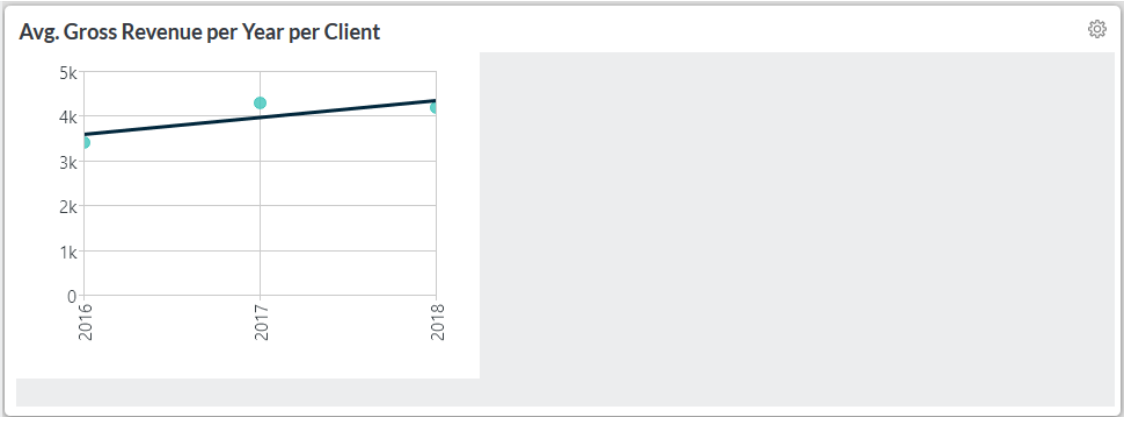
Avg. Gross Revenue per Year per Client

This line chart shows the average gross revenue per client. There are no settings or filters.



Example: Your pre-tax invoice total revenue for 2016 was $133,186.77 based on 39 clients. If you divide the total by 39, the line charts shows that amount.

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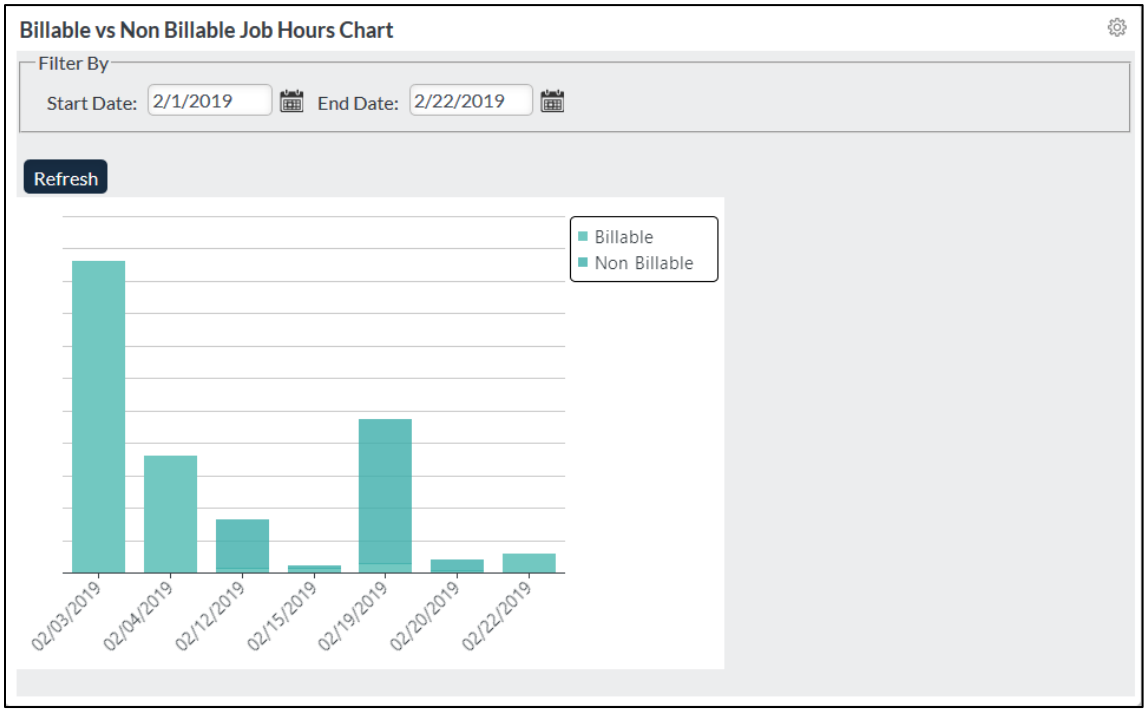
Billable Vs Non Billable Job Hours Chart

The graph shows the combination of billable time and non-billable time logged by day. If no time has been logged for a full week, it will not appear on the chart.



- The chart calculates the percentage between billable and non-billable, based on hours entered for the user on the account. It is for only for those resources who are logged in.
- Time logged for other resources does not appear in this chart.
- There is no set Y axis.

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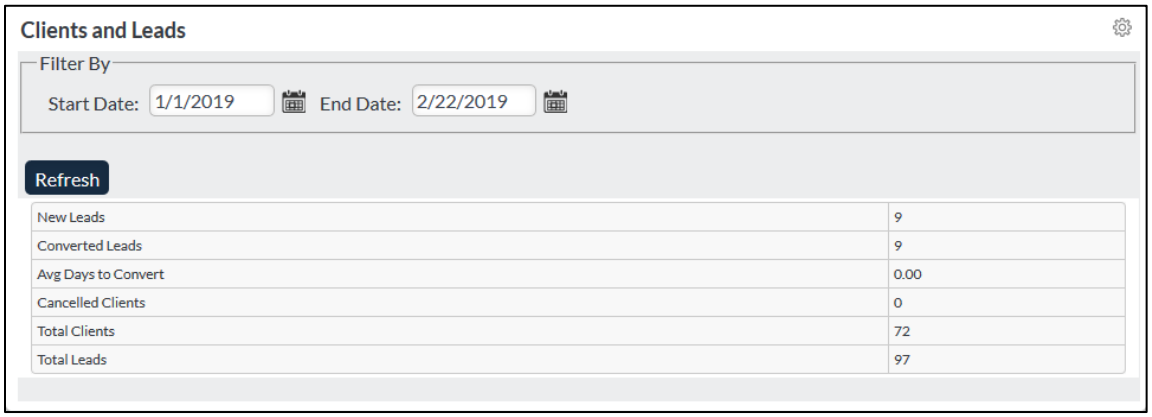
Clients and Leads

This panel shows the number of clients and leads of all statuses. You can filter by date range.



Categories

NEW LEADS	Any new Lead created within the selected time frame. Note: SA counts newly-created clients as a Lead upon creation.
CONVERTED LEADS	Lists when a lead was converted into a client. Note: SA counts newly-created clients as a Lead upon creation.
CANCELLED CLIENTS	Clients who were cancelled during the selected time frame (Verified with Cancellation panel).
TOTAL CLIENTS	Total of active and former clients listed on the **Client** list.
TOTAL LEADS	The total from the “All clients & Leads” tab on the **Client** list.

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Close Ratios by Sales Rep

This panel counts the number of estimates and the **won** revenue amount for each of those estimates in the selected time frame. The panel includes statuses of won, draft, and lost. Only "Won" estimates are listed. You can select a date range.

Categories

SALES REP	The Sales Rep on the estimate.
WON COUNT RATIO	The number of estimates within the range and the percent the sub is representing. For example, there are a total of four estimates. Sales Rep A has two of those estimates. They are both in "Won" status. So Sales Rep A has a 50% and (2) marking that they have two estimates with the won status. Sales Rep B has two estimates, but one is in "Won" status and the other is in "Lost" status. Since only one of the estimates is won, Sales Rep B has a 25% and (1). So out of the four estimated, they only had one that "won."
WON AMOUNT RATIO	Actual percentage and amount of each salespersons estimate/estimates in how they relate to the total WON revenue of the four estimates.

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Closed Estimates (Last 30 Days)

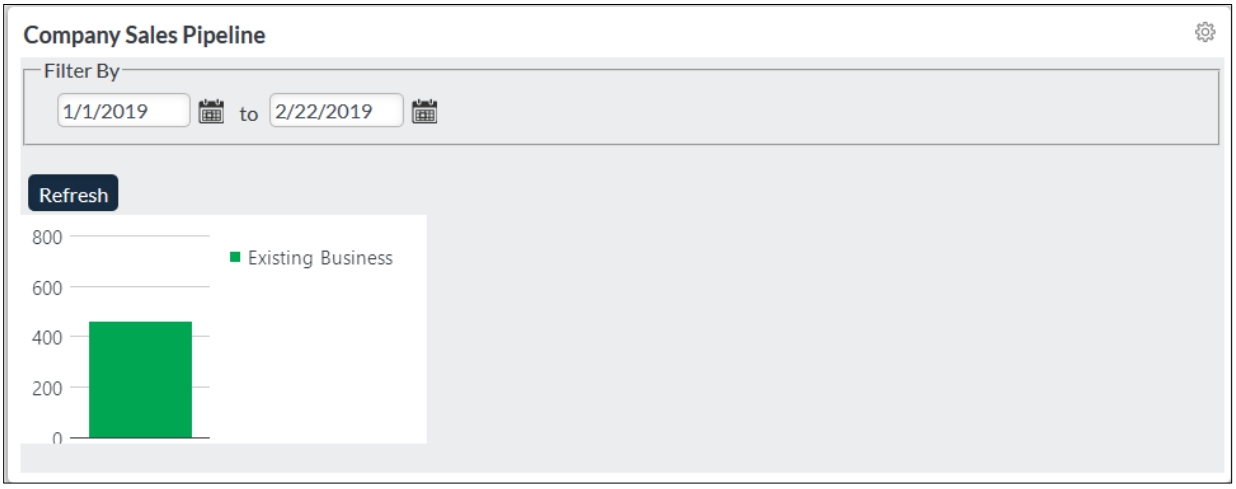
This panel shows the client name along with the estimate value and estimate cost for each client. It shows estimates that are closed and won. You can filter by Sales Rep.

Categories

EST VALUE	Set subtotal of the estimate before tax.
EST COST	Set cost on each estimate.

Company Sales Pipeline

This graph compares new to existing business. You can filter by date range.



The numbers are for estimates with a status of “Draft” or “Sent.” Leads appear under “New Business” and current or former clients appear under “Existing Business.”

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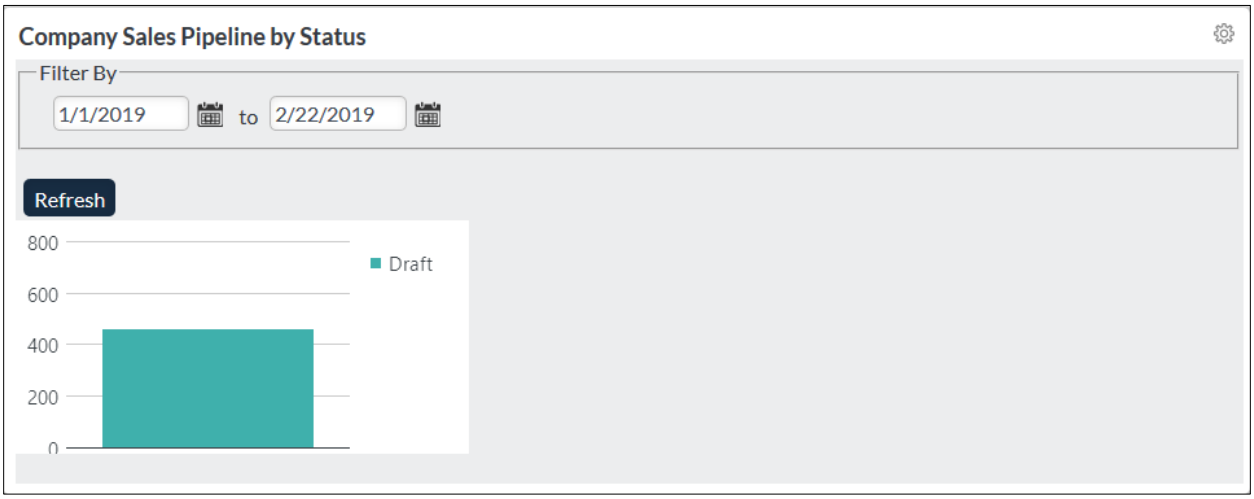
Company Sales Pipeline by Status

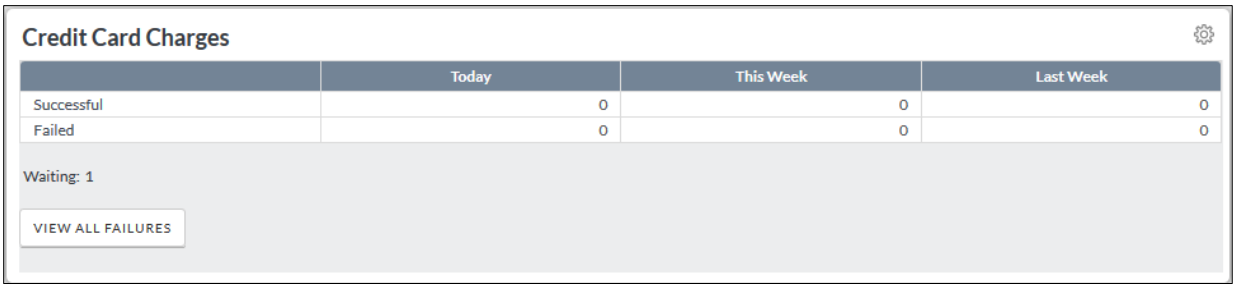
This graph compares different estimates.



This includes data similar to the “Company Sales Pipeline” panel. However, this chart is based on the stage of the estimate, either sent or drafted.

Credit Card Charges

This panel is designed to pull directly from bulk charges in the invoices section. If the credit card was not charged in bulk or through the invoices section, it will not appear on this chart. There are also known delays for payments to process since it is part of a Queue process.



	Today	This Week	Last Week
Successful	0	0	0
Failed	0	0	0

There are two different statuses: “Failed” and “Successful.” The columns are divided into a two-week span. There is a “waiting” status for pending CC payments. The “view all features” option will take you to an invoice screen and show the status of each failed charge.

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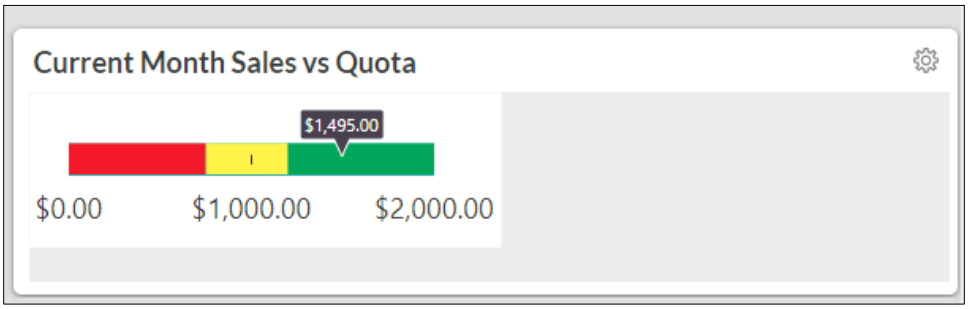
Current Month Sales vs Quota

This chart displays only the won estimate income amounts.



The monthly quota is set in the user's employee account under Sales Quota. The sales number is based on estimates for the user profile.

Customers/Leads

The chart breaks down new clients and new leads for the past three months. There are no filters.

Clients/Leads

	Jan 2019	Feb 2019	Mar 2019
New Clients	0	9	0
New Leads	0	9	0
Conversion %	0.00%	100.00%	0.00%
Terminated	0	0	0

NEW CLIENTS and NEW LEADS	These are based on the date they were created. You can click the number on the chart, and it will take you to a client/lead list of all Leads and Clients based on their creation date. **Note**: SA considers new clients as Leads, since they were a lead before they became a client). So if you create a new client, SA will consider it a converted Lead.
CONVERSION %	Percentage of those leads who became clients.
TERMINATED	This is based on the former client list. If you select the row, it displays a new list of former clients.

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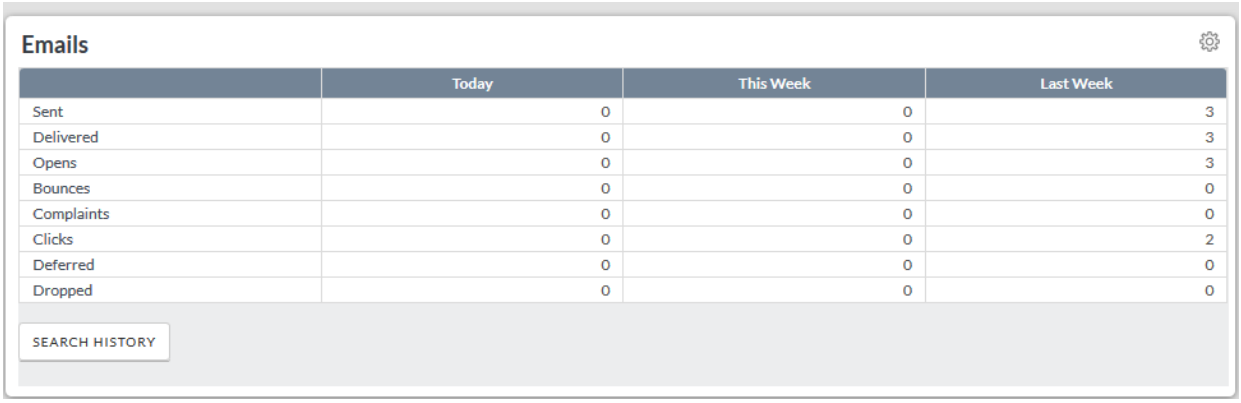
Emails

Click each row to see what each category means. The system will automatically send it to a status page for the email category.



Emails

	Today	This Week	Last Week
Sent	0	0	3
Delivered	0	0	3
Opens	0	0	3
Bounces	0	0	0
Complaints	0	0	0
Clicks	0	0	2
Deferred	0	0	0
Dropped	0	0	0

SEARCH HISTORY

The columns cover two weeks of email data:

- Sent
- Delivered
- Opens
- Bounces
- Complaints
- Clicks
- Deferred
- Dropped

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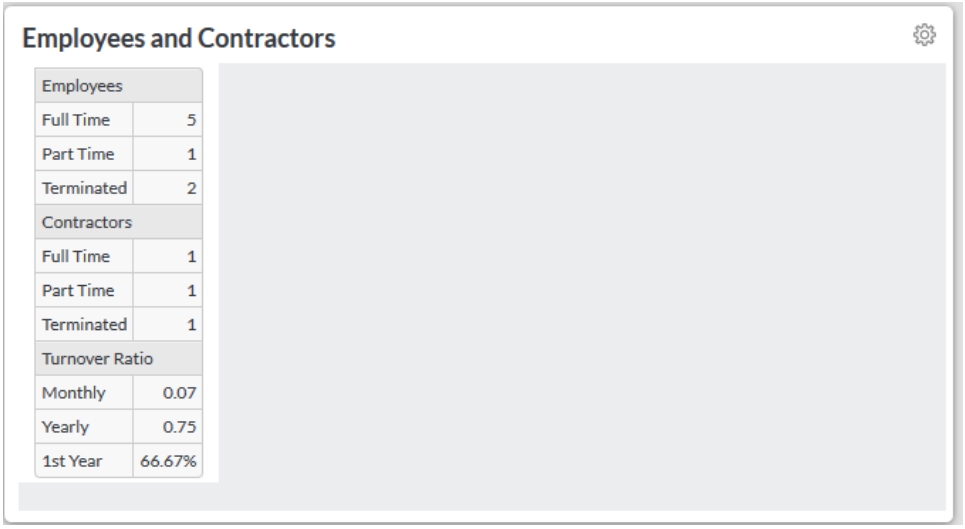
Employees and Contractors

This panel lists the statuses of employees and vendors (resources) as Full Time, Part Time, or Terminated. It will **not** show any resources on the inactive list. Statuses are set on the employee profile on the "Employment" tab.

For terminated resources, on the "Employment" tab, fill in the field "Date of Release." If you mark an employee as "inactive," this panel will still count them as an active part-time or half-time resource.



Estimate Stage Pipeline

This bar graph represents the total income values of estimates for the entire company history, based on the Estimate Stage.

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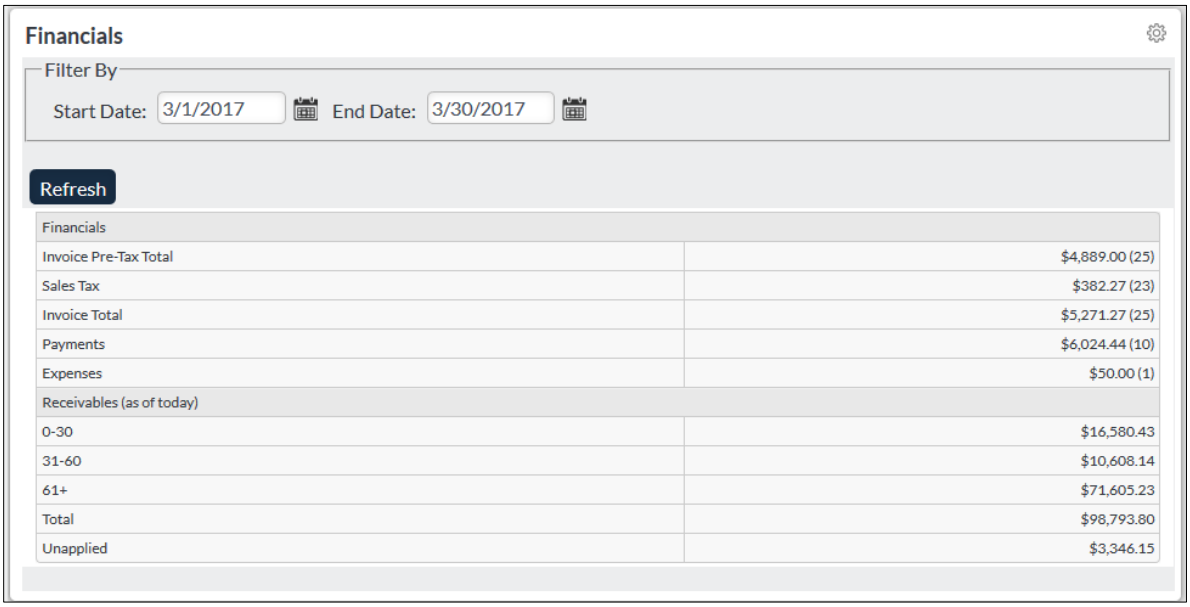
Financials

This panel shows Financials and Receivables by the date range you specify.



Financials	
Invoice Pre-Tax Total	$4,889.00 (25)
Sales Tax	$382.27 (23)
Invoice Total	$5,271.27 (25)
Payments	$6,024.44 (10)
Expenses	$50.00 (1)
Receivables (as of today)	
0-30	$16,580.43
31-60	$10,608.14
61+	$71,605.23
Total	$98,793.80
Unapplied	$3,346.15

INVOICE PRE-TAX TOTAL	Shows the pre-tax amount of invoice total for the date range.
SALES TAX	Combined sales tax invoiced in the specified timeframe.
INVOICE TOTAL	Combined amounts verified by the Invoice tab "Filtered Results."
PAYMENTS	Combined total of posted payments within the set date range.
EXPENSES	This number comes from the Expenses section. Each column has a number in brackets showing the actual number of invoices, payments expenses etc. The Receivable rows relate to the A/R Aging panel and show the combined past-due amounts for all clients. The "Unapplied" category shows the total amount of a unapplied payments in the account.

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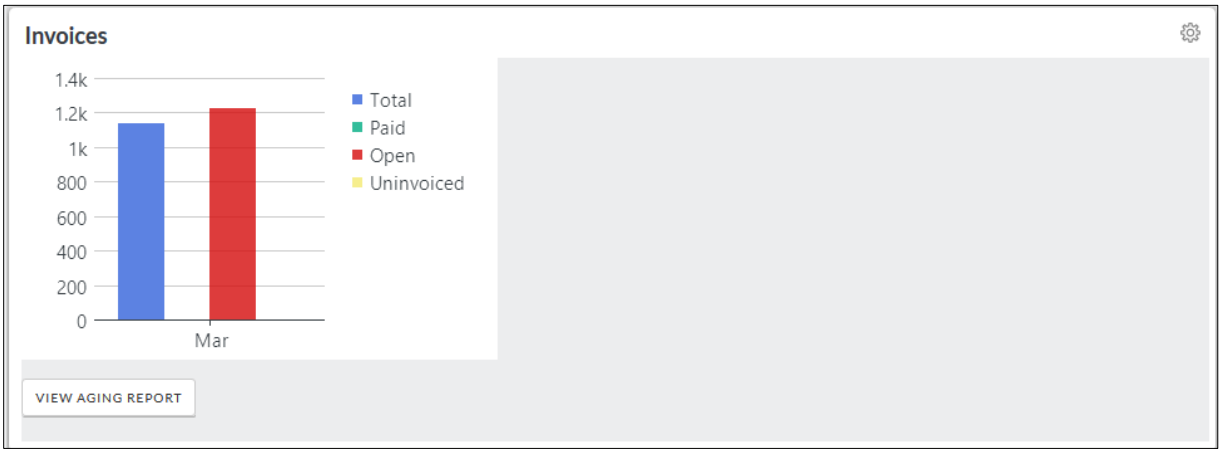
Invoices

The bar chart shows four categories of invoices: Open, Paid, Open, and Uninvoiced, for the month.

- Open invoices shows the total including tax.
- Uninvoiced shows the pre-taxed amount of the combined invoice total.



Click their one of the bar charts to see the same results page for the current month. Click the **View Aging panel** button to see the latest A/R aging panel.

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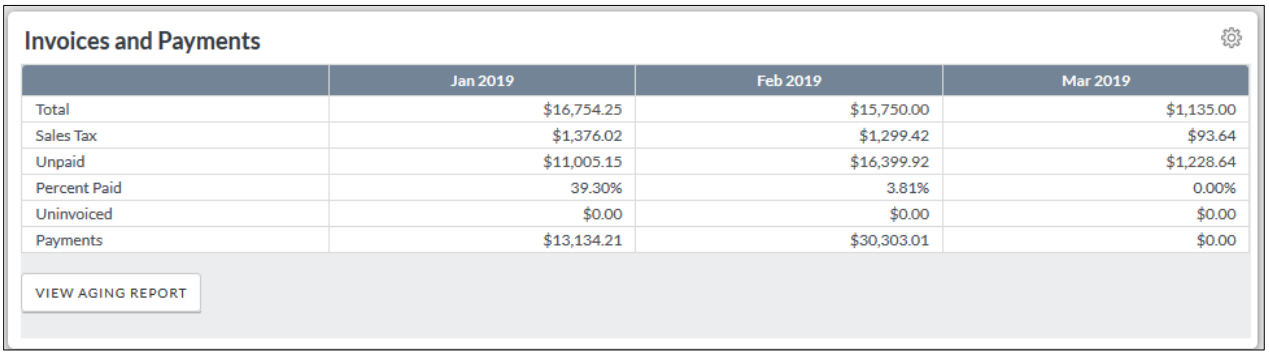
Invoices and Payments

This panel shows invoices and payments within the past three months.



Invoices and Payments

	Jan 2019	Feb 2019	Mar 2019
Total	$16,754.25	$15,750.00	$1,135.00
Sales Tax	$1,376.02	$1,299.42	$93.64
Unpaid	$11,005.15	$16,399.92	$1,228.64
Percent Paid	39.30%	3.81%	0.00%
Uninvoiced	$0.00	$0.00	$0.00
Payments	$13,134.21	$30,303.01	$0.00

VIEW AGING REPORT

TOTAL	Pre-taxed invoice amount that can be compared to the Filtered Results tab in the invoices section.
SALES TAX	Tax amount from those invoices.
UNPAID	Total unpaid invoiced amount. Can be related to the Open invoices section.
PERCENT PAID	Based on the total amount of the invoices for the month including tax. Subtracted by the unpaid amount. You then divide by the original total. Then multiply by 100 (basic percentage formula).
UNINVOICED	Related to the pre-tax number of invoices in the incomplete tab in the invoices section.
PAYMENTS	Directly related to the total number of all payments. Can compare to the Payments section. There is also a “View Aging panel” option that will link to the A/R Aging panel.

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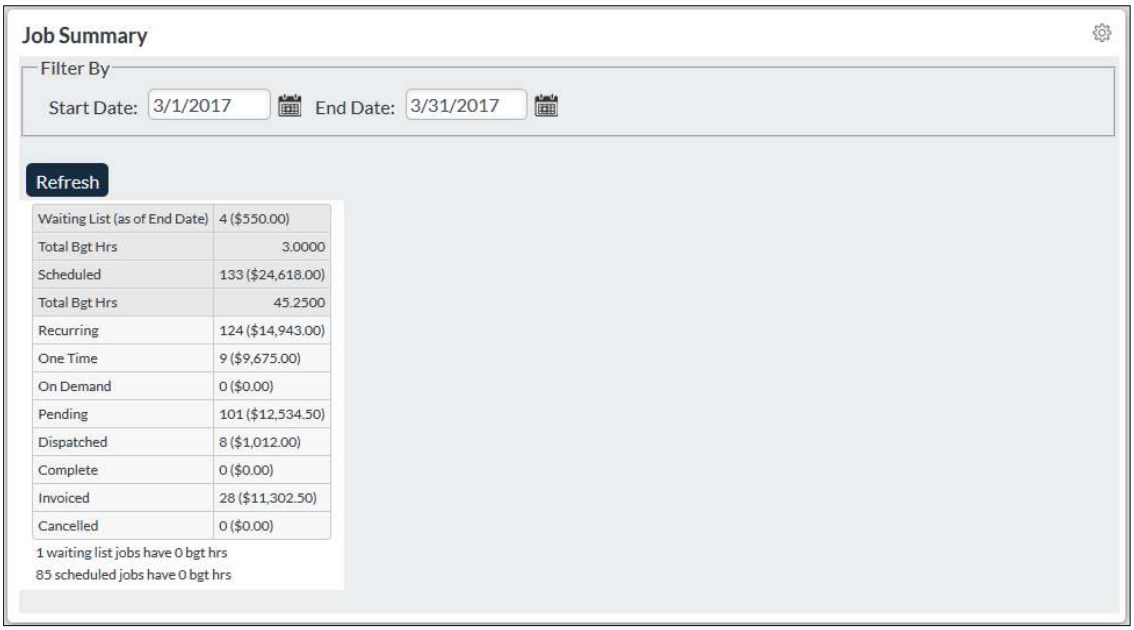
Job Summary

This panel lists the total number of budgeted hours on the Dispatch Board and Waiting List, depending on their scheduled date and end date.



You can specify the date range at the top.

In the example, the Waiting List has 4 jobs that are scheduled for a total of $550.00. The Total budgeted hours for those Waiting List jobs is 3 hours.

There are 133 scheduled jobs on the Dispatch Board equaling $24,618.00. The budgeted hours for those jobs equals 45.25 hours.

The rest of the jobs are listed by type (Recurring, One-Time, On-Demand) and status (Pending, Dispatched, Complete)

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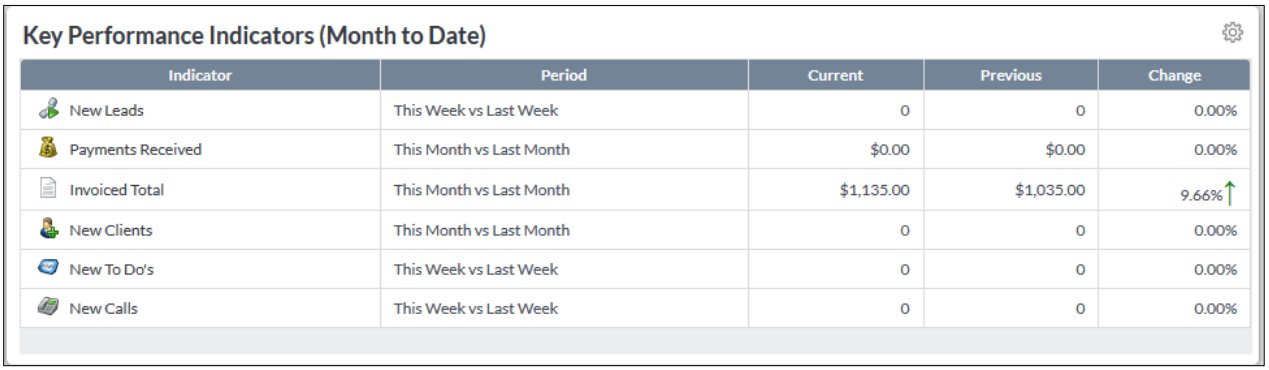
Key Performance Indicators (Month to Date)

This panel shows key indicators by time period and percentage change.



Key Performance Indicators (Month to Date)

Indicator	Period	Current	Previous	Change
New Leads	This Week vs Last Week	0	0	0.00%
Payments Received	This Month vs Last Month	$0.00	$0.00	0.00%
Invoiced Total	This Month vs Last Month	$1,135.00	$1,035.00	9.66% ↑
New Clients	This Month vs Last Month	0	0	0.00%
New To Do's	This Week vs Last Week	0	0	0.00%
New Calls	This Week vs Last Week	0	0	0.00%

NEW LEADS	This row is set up to show the number of leads generated in the present week compared to the previous week. The change percentage shows the difference in weeks.
PAYMENTS RECEIVED	Compares the total number of payments collected between one month and the next, by the key performance date.
INVOICED TOTAL	Compares the present to the previous month total invoice amount, up to the key performance date. Amounts are tax-free.
NEW CLIENTS	Compares the number of new clients between the two months.
NEW EMAILS	Tracks the number of Emails created between the two months.
NEW CALLS	New calls appear only when they are assigned to a resource.

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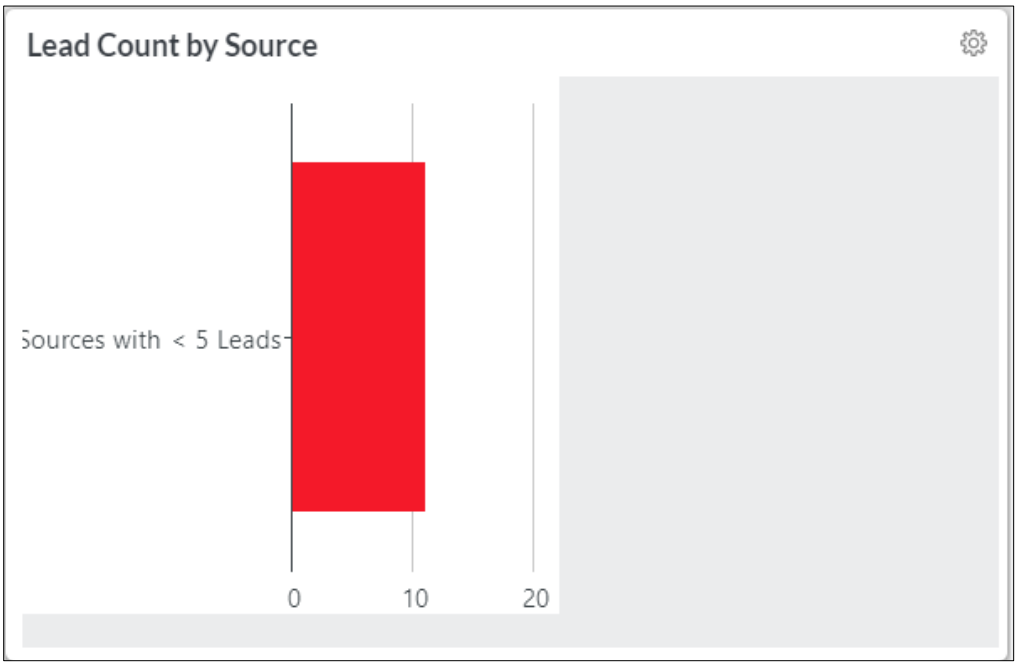
Lead Count by Source

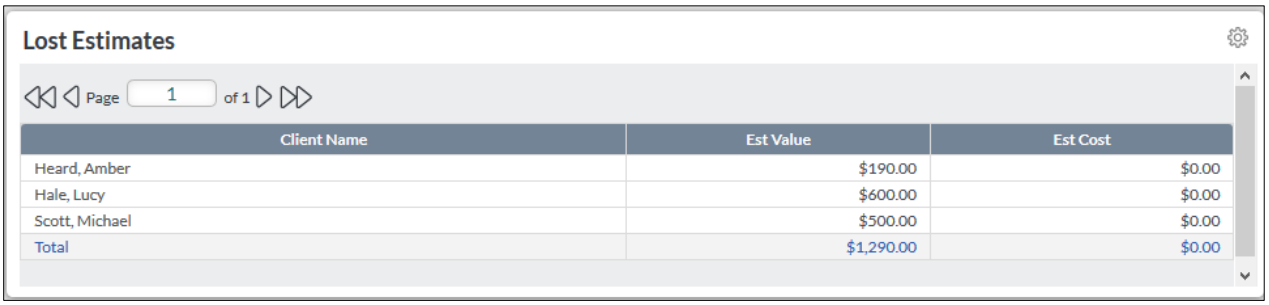
This graph shows the number of leads by each source for the current month. If you click the graph, it takes you to the Sales Summary by Source panel. Different chart colors will appear based on the number of leads and lead sources.



Lost Estimates

This panel shows only lost estimates if the estimate was created by the user who logged in.

For Example, if as a Sales Rep, I create an estimate with myself as Sales Rep, when the estimate is lost, it will appear on this panel. Lost estimates for other Sales Reps do not appear.



Client Name	Est Value	Est Cost
Heard, Amber	$190.00	$0.00
Hale, Lucy	$600.00	$0.00
Scott, Michael	$500.00	$0.00
Total	$1,290.00	$0.00

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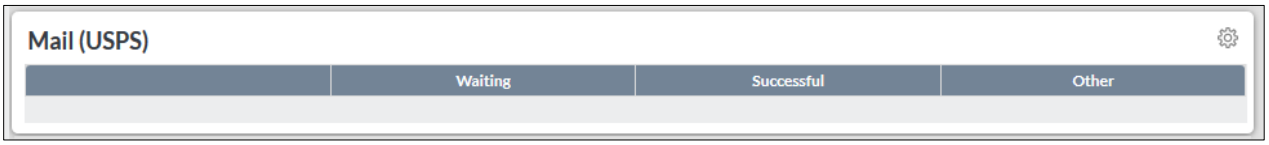
Mail (USPS)

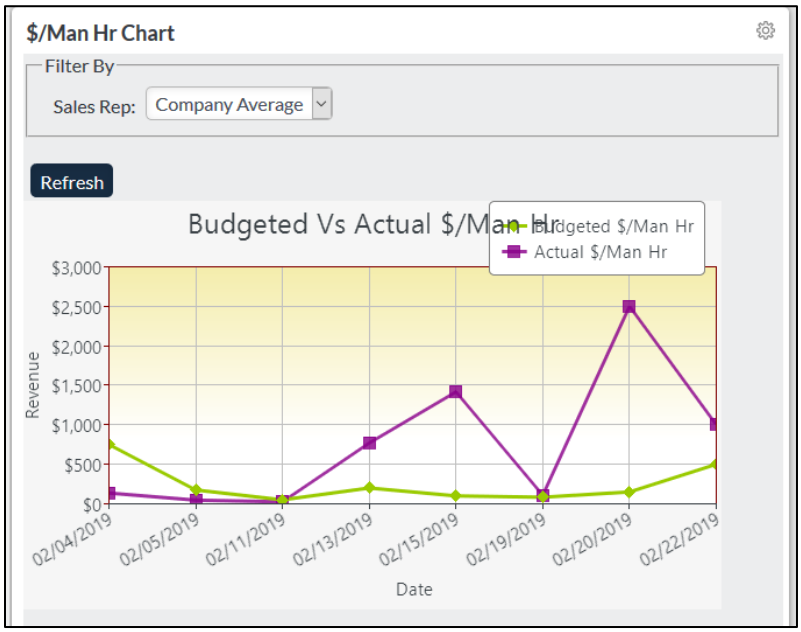
This panel tracks the process of members who use the USPS feature.



No filter options. Columns: (Waiting)(Successful)(Other)

$/Man Hr Chart

This chart shows the budgeted hours versus actual staff hours. You can filter by Sales Rep.



Note: Be sure that the scheduled job is set to the correct Sales Rep in the master job settings, not the client settings. The “Company Average” shows all dates regardless of the set Sales Rep. But if you search by specific Sales Rep and they are not set in the master job, they will not appear on this panel.

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Monthly Company Sales vs Quota

This graph compares the monthly sales quota to what was actually sold for the month, based on "Won" estimates for the Sales Rep.

The monthly quota is set up in the employee profile under **Settings > Sales Quota**. The actual sales number is based on the won estimate values for the user's set estimate as a Sales Rep.

For Example, I'm set up as a Sales Rep and create an estimate. That value is what appears on this chart. It does not show the values of any other Sales Reps.

Monthly Income Distribution

This chart is divided into the number of clients and each client's pre-taxed invoice amount, based on set dollar ranges.

When you click on any of the pie charts, you will see the Invoiced Income by Customer panel. Once there, you can manually filter to the current month.

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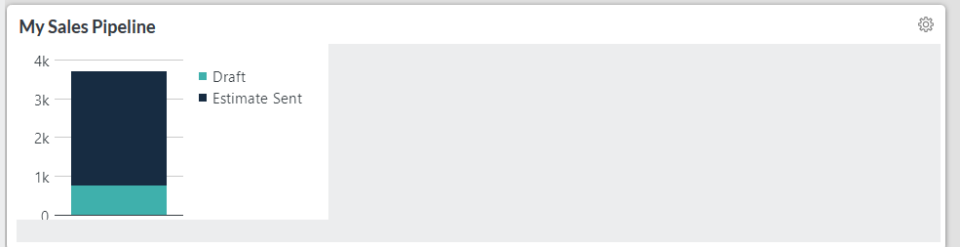
My Sales Pipeline

This graph shows the combined values of estimates in Draft or Sent status for a Sales Rep. There are no filters.



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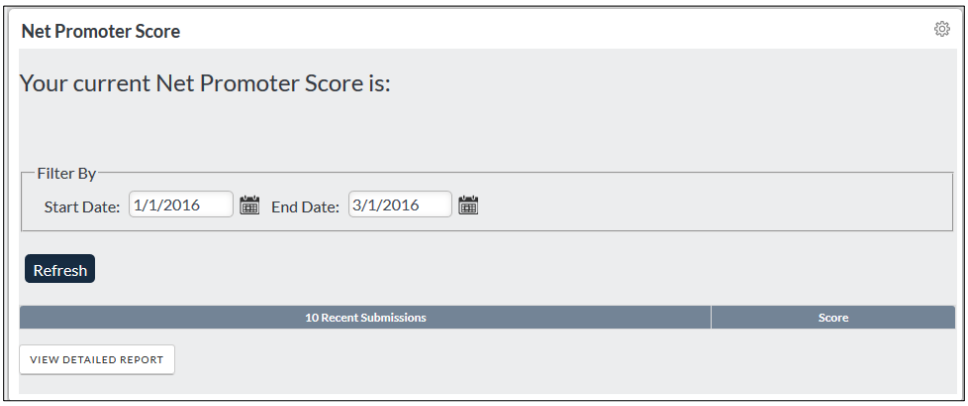
Net Promoter Score

This panel shows the current Net Promoter Score. There is a column showing the 10 recent client submissions and the Score. There is also an option for "View Detailed panel," which opens the Net Promoter Score Detail panel.



The combined scores will add up to the total net promoter core. A perfect score of 10 on the net promoter ranking on the form generates a 100 score on the panel.

When there are more submissions, the score is a combination or percentage.

What is a Net Promoter Score (NPS)?

from ***Netpromoter.com***

Calculate your NPS using the answer to a key question, on a 0-10 scale:
How likely is it that you would recommend [your company] to a friend or colleague?

Respondents are grouped as follows:

- Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

Subtracting the percentage of Detractors from the percentage of Promoters yields the Net Promoter Score, which can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every

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New Customers This Month

This panel lists new clients that were generated for the month. The phone number comes from the "work" phone settings.

Click the **New Customers Report** button to open the New Clients panel, preset to the monthly date range.

New Leads This Month

This panel lists new leads that were generated for the month. The phone number comes from the "work" phone settings.

Click the **New Leads Report** button to open the New Leads panel, preset to the monthly date range.

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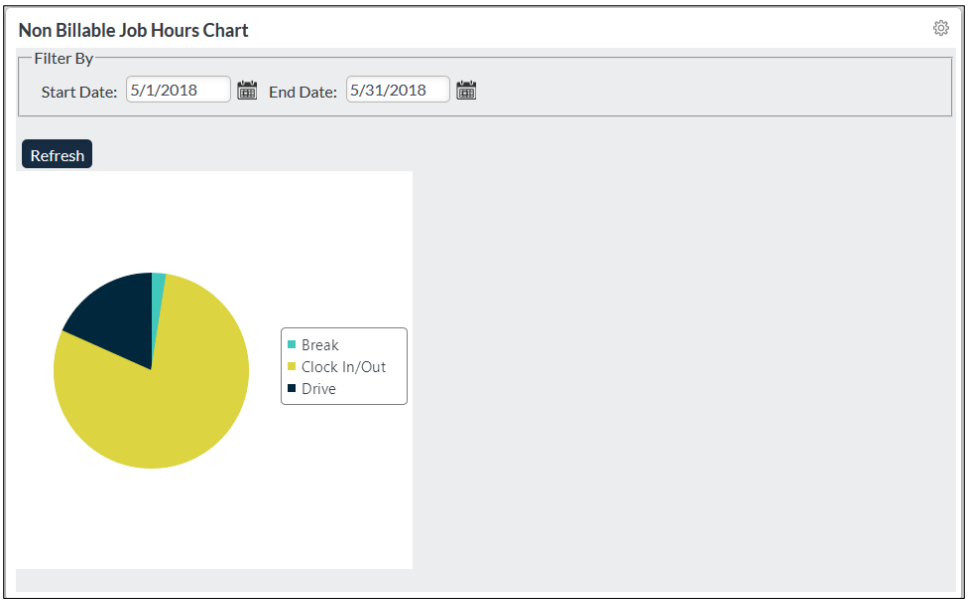
Non Billable Job Hours Chart

There are standard date range filters at the top of the panel. It pulls up a pie chart that shows the total breakdown of time for employees.

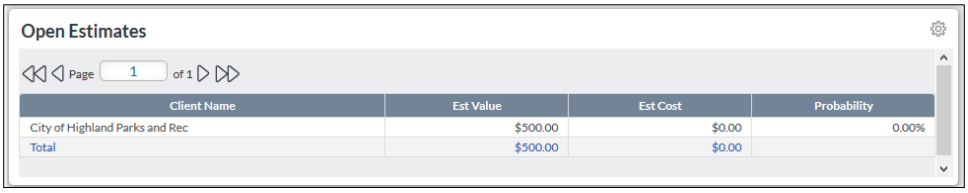


The colors will systematically change depending on the amount of time categories. The times appear to be according to the time sheets and only non-billable time. Clock in/clock out times to actual jobs will not appear on this panel.

Open Estimates

This panel shows any open estimates, based on the Sales Rep.

For Example, I'm set up as a Sales Rep. If I create an estimate and set myself up as a Sales Rep on that estimate, it will appear on this panel. But I cannot see any other estimate created by a different sales rep. Once the estimate is closed, it will no longer appear on this list.



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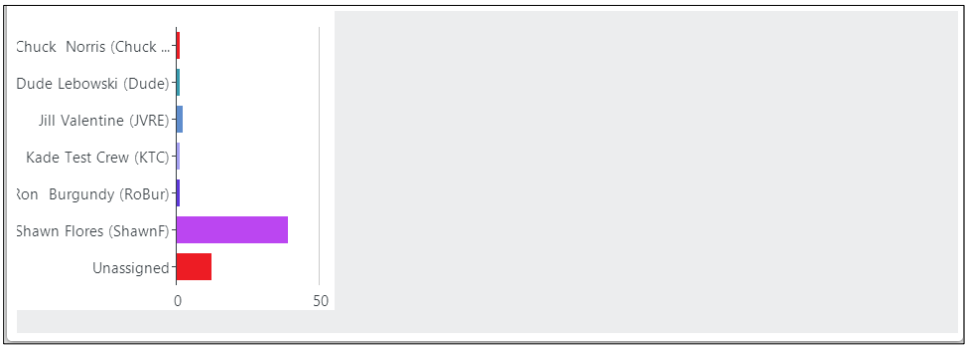
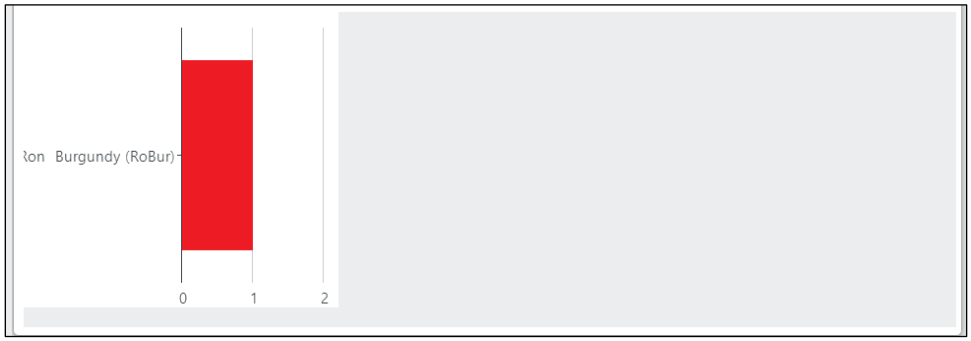
Open Tickets By Assignee

No set filters. Multicolor chart showing the number of open Tickets assigned to resources



Open Tickets By Assignee Due In 7 Days

This chart shows the number of open Tickets within a 7-day period.



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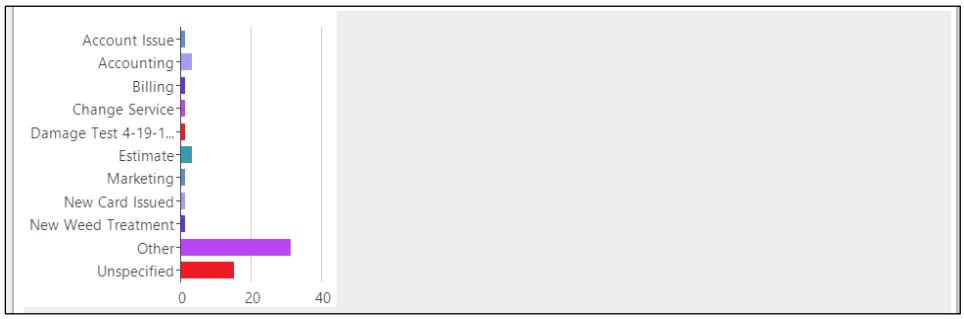
Open Tickets By Assignee Due Today

This chart shows the number of open Tickets that are due for the current day.

Open Tickets By Type

This chart shows the number of open Tickets according to their type.



The panel does not include the name of the resources.

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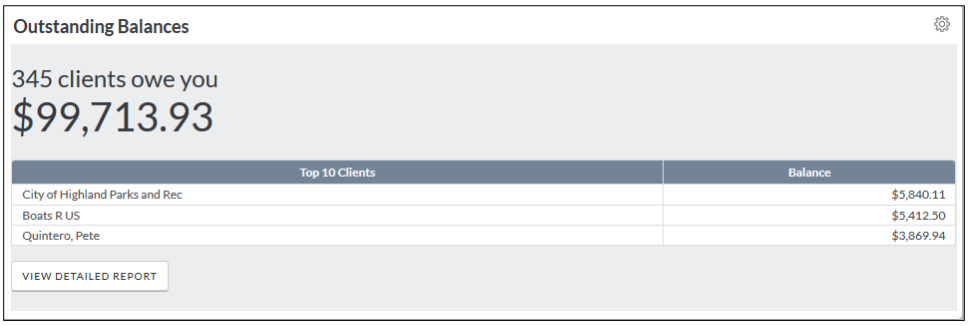
Outstanding Balances

This panel provides a top ten list for clients with the largest account balances. Click a client in the list to see the client page.

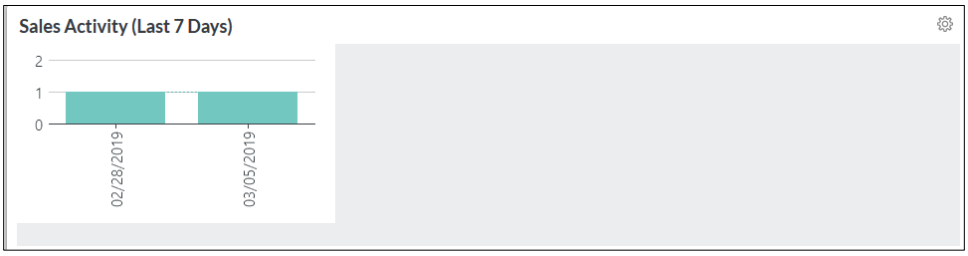


The Dashboard amounts include unvoiced amounts and contract invoices that have not yet been generated. Click **View Detailed Report** to go to the A/R Aging Report.

Sales Activity (Last 7 Days)

This panel contains a bar chart that shows the number of estimates created on a specific day. A red line represents growth in the last 7 days.

If you hover over a bar, it will show the total number created for that day. If you hover over the red line, you'll see a date and count.



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Sales Comparison Chart

This line graph compares the sales totals for each month of the past year against the same month of the previous year. This allows you to analyze this year's sales with last year's sales, month by month.

The graph combines the pre-tax invoice amount every month.

The example above compares the invoices from April – March 2017 with April – March 2018.

Sales Comparison Chart (Paid)

This line graph compares the current year's paid sales total with last year's paid totals.

The graph compares the paid amounts of invoices in the Invoices section with a status of Paid. It shows all invoices for the month. It also includes the balance difference on the "Open Invoices" tab. For example, if there is an open invoice of $100.00 with an amount of $50.00 due, the chart will count that $50.00 that is applied to the payment total.

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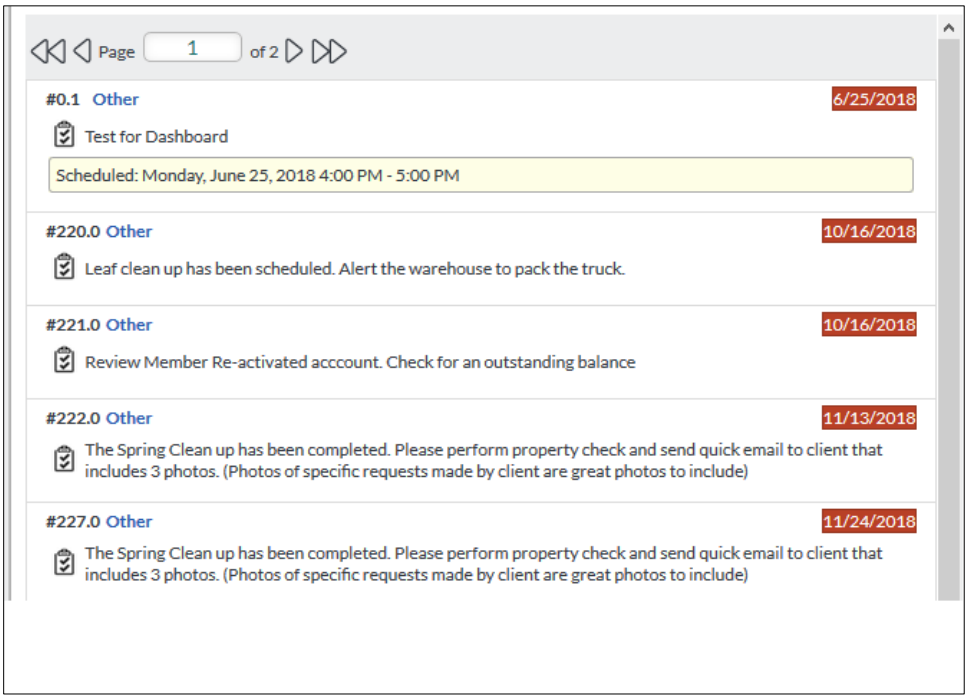
Sales Leaderboard by Count

This panel shows the name of the Sales Rep and the number of open estimates they have in a date range that you can specify. The estimate must be in Open status; if they are in Draft status will not appear.

Tickets

This panel shows existing Tickets in order, with the oldest first for each category.

If the Ticket did not have a scheduled date, it will not appear. If there are two Tickets in the "Other" category, the oldest missed Ticket will appear.



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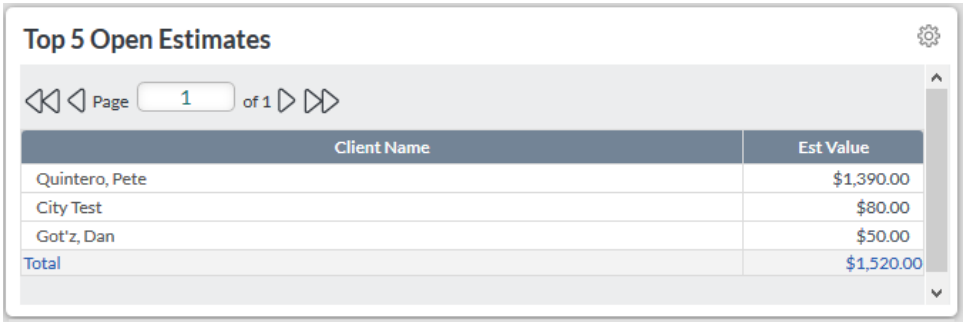
Top 5 Open Estimates

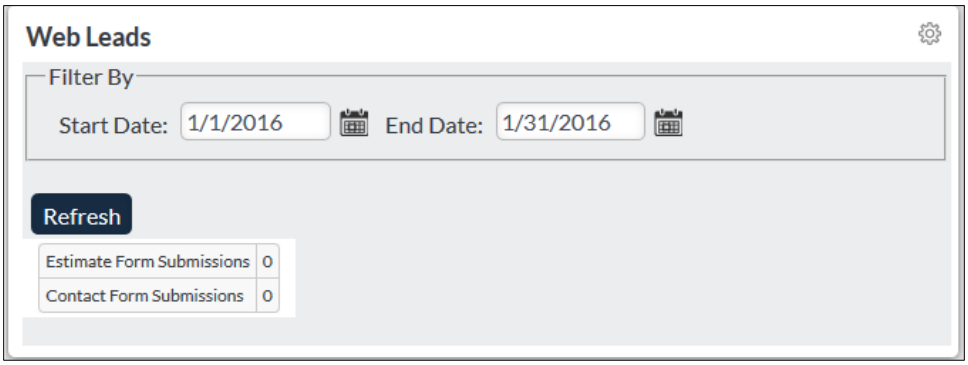
This panel shows the top 5 estimates. Click a name on the chart to open the estimate it refers to.

The estimate must be in Open or Sent status. Estimates in Draft status do not appear.



Web Leads

This panel is available only for legacy SA Members who set up the system before the current Form publishing options.



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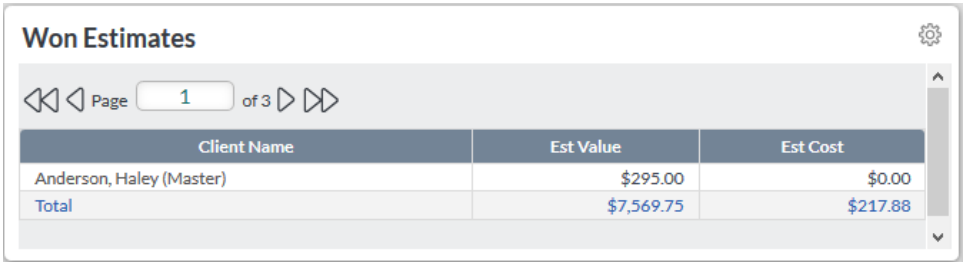
Won Estimates

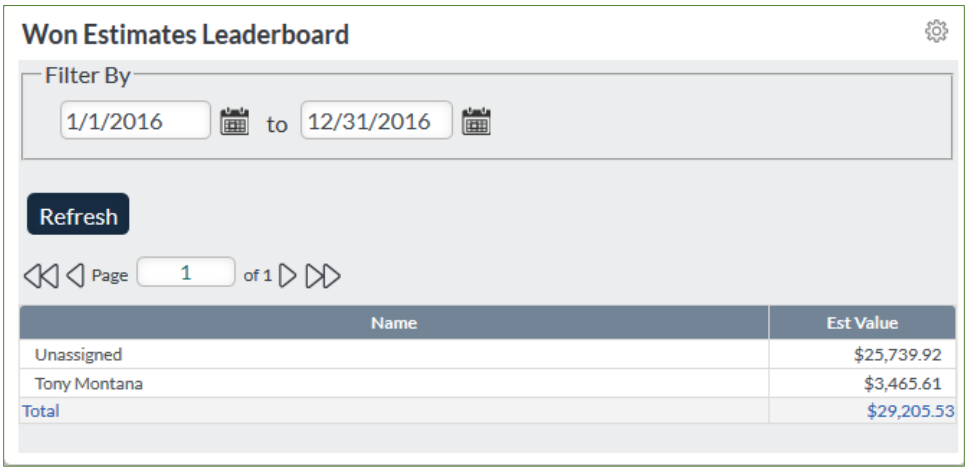
This panel provides a list of clients with a “Won” status.

The chart includes estimates if the user is marked as the Sales Rep. Individual Sales Reps will not see any other Sales Reps’ estimates.



Won Estimates Leader Board

This panel shows the Sales Rep and estimated value of Won Estimates during the date range you specify. Estimates with no set Sales Rep will show the name as “Unassigned.”



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