WIDE

Dashboard

The Dashboard which is accessed via the Home menu contains a series of pages comprised of interactive dashlets. Each dashlet houses an easy-to-read sales chart or graph. These include pending business and ranking information. Multiple dashlets can be on one page, and new pages may be added to the existing Dashboard allowing for maximum customization.

Pipeline Page

ashboard					Add Dashlets	X Actions
Pipeline Ranking						
Pipeline						🖉 टॉ
Pipeline total is \$8	07K for 01/01	/2010 - 03/31/20)10 (WTV-SC)			
 Figure 1 is disp Pipeline tab wh represents the second s	ich is showin first quarter of ormation abo allows you to on. e piece will o 2 which conta	ng a pie chart t of 2010. If the pie piece out that section o click through open the windo ains a list of o	hat s to n. for ow nly	\$446.68	pposal K 55.3% r drilldown	(\$191.11K (\$50.33K
					\$119	. <u>11K</u>)
 From there you or narrow the lis provided. Or cl specific details 	st using any i	of the search to son an item to s	filters			Figure 1
Orders: Home					Create Opportunity	Actions *
List	Select - Selected: 17				🕅 🔄 (1 - 17 of 17) 🕨 🕅	Hide Filters
Name	Agency Select Clear	Advertiser Select Clear	Туре	Search clear		
Hide A	dvanced Filters	Select Clear				
Order number	Amount	Probability (%)	Expected Close Date			
	Sales Stage	Account Executive	Product Code			
Station		A	▲ <u>▲ </u>	<u>^</u>		
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Station KDAF KDFW KTVT WFAA WRD-AM WRD-FM	Avail Closed Lost Closed Won Final Negotiation	WO Migration Andrea VanWagner	Automotive	÷		
Station KDAF KDFW KTVT WFAA WRD-AM	Avail Closed Lost Closed Won Final Negotiation New Prospect	WO Migration Andrea VanWagner Andrew Knight	▷ Deverages	•		

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- The other type of graphic seen under the Pipeline tab is a bar graph, which can be viewed as vertical or horizontal bars.
- The behavior of this bar graph is similar to the pie chart, clicking on a selected bar will open the Orders:Home window.
- Clicking the edit icon for **any** of the Dashlets allows you to edit the information that is displayed. Such as title, page size, date range and how revenue is displayed or ranked.

Ranking Tab

The Dashlets under the Ranking tab offer a quick ranking of new and/or regular business by Advertiser, Agency or AE. The revenue can be ranked by business Won, Lost or in the Pipeline. Click on any of the bars in these Dashlets to drill down for more information.

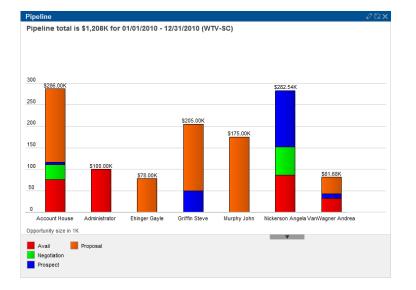
Dashboard								A	dd Dashlets	Actions 🔹
Pipeline Rai	nking									
Ranking Top	Agency Reven	iue		00×	Ranking T	op Advertise	er Revenue			00×
Top 10 Agency	by Revenue fo	r 01/01/2010 - 12/31/2	010 (WTV-SC)		Top 10 Ad	vertiser by Re	venue for 01/01/2	2010 - 12/31/201) (WTV-SC)	
0	1000	2000	3000	4000	0	500	1000	1500	2000	2500
Ogilvy & Mather					Best Buy					
GSD&M					Dove					
GSD&M					Dove					
										-
W F of R					Sylvan Lean	ning Center				
BBD&O					Wal-Mart					

Adding a Dashlet

- Clicking the **Add Dashlets** button at the top of the screen opens the Add Dashlets window.
- Select the type of chart you would like to add to the page by clicking the appropriate link, then close the window.
- Clicking Edit on the newly added Dashlet allows you to quickly customize the information yielded from the chart.
- Arrange dashlets in any order on a screen by dragging and dropping to any area of a screen.



• Delete a dashlet from a page by clicking 🔀 at the top of the dashlet you want to remove.



WIDE





Adding a Page

The dashboard can hold several pages. So a new page may be added to house additional dashlets. Each dashlet is then edited so you can see as much or as little information as you want on your own dashboard customized by you to your preferences.

- From the Actions drop down menu select Add Page.
- You may title the page however you would like and select the number of columns you would like on the page.
- Click Submit to accept the changes.
- Once the new page is created Dashlets may be added.

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• It is important to note that Account Executives will only be able to see their own information, where as Sales Management with proper security rights will be able to view all AE's and stations.

Add Page
Page Name:
Number of Columns:
Submit Cancel