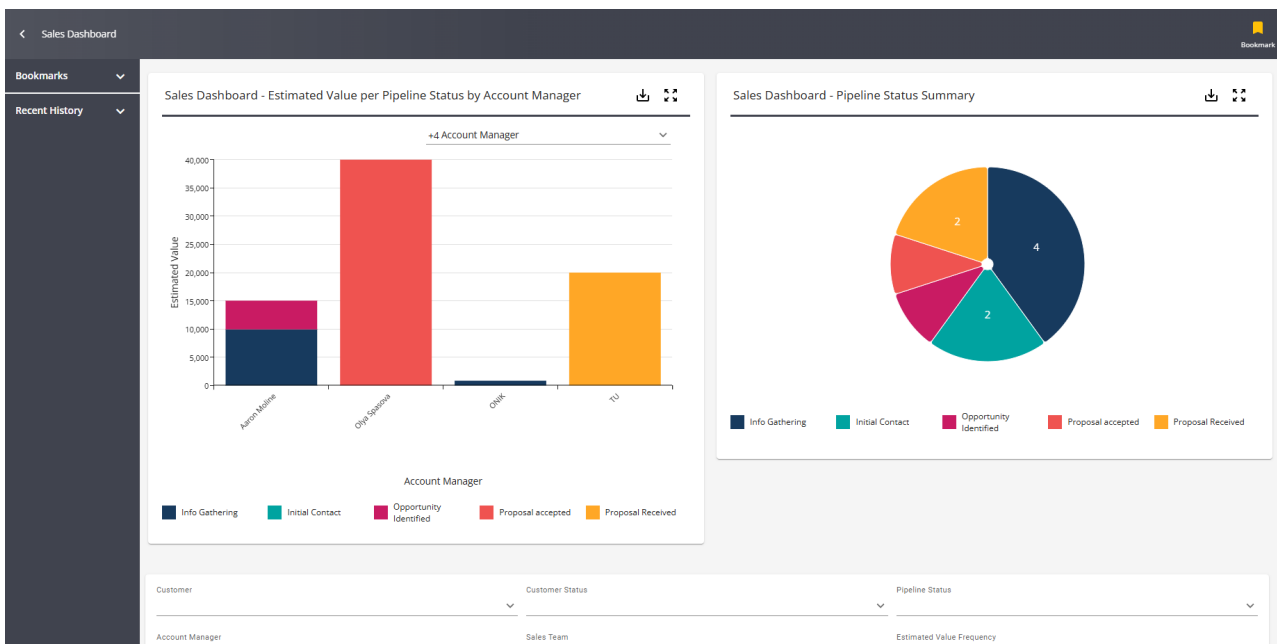


Beyond - Sales Pipeline Dashboard

Last Modified on 09/19/2024 12:48 pm CDT

Overview

With the Sales Pipeline Dashboard, you will receive a real-time overview of your Prospect customers and their current Pipeline Status. With this information provided in a clear and easy to understand manner, this will lead to efficient decision-making, enhanced productivity, and increased revenue due to streamlined workflows and quicker placements.



Note The data presented within the Sales Dashboard is related to the hierarchy you are at within Beyond.

Security Permissions

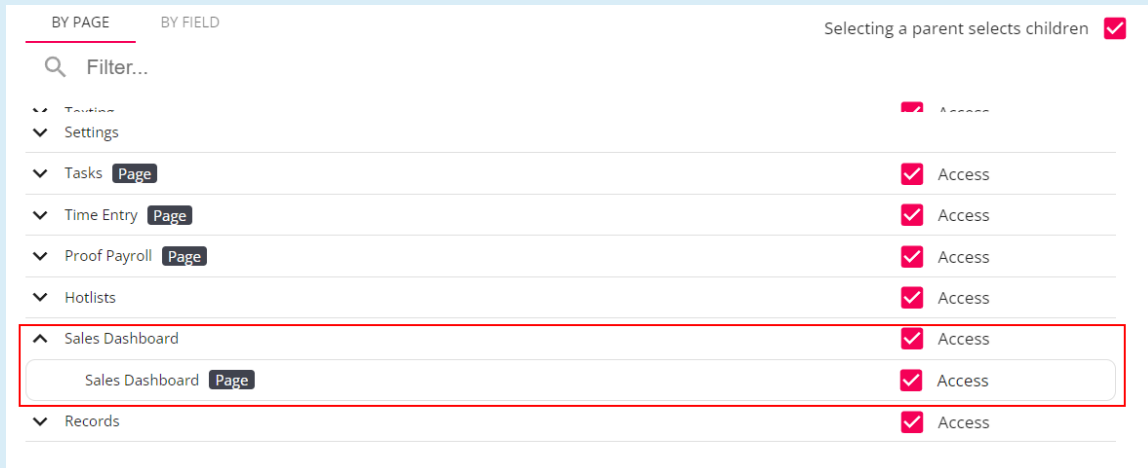
To access/view the insight widgets that are presented within the Sales Dashboard, users will need to have access to the following insight widgets within their respective Insight Widget Security Group via B Menu > System Settings > Security > Insight Widgets:

- Sales Dashboard - Estimated Value per Pipeline Status by Account Manager
- Sales Dashboard - Pipeline Status Summary

Note The above two permissions are enabled by default within the "Tempworks Default - All Insight Widgets" Security Group.

The insight widgets can also be added to any other Insight Widget Security Groups that are required by your processes.

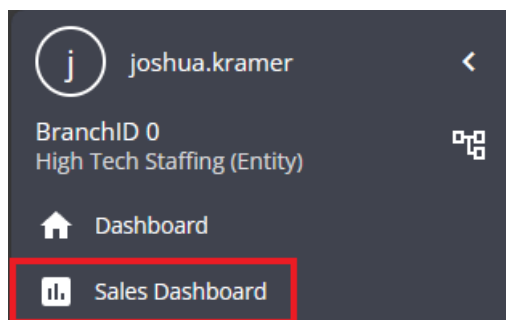
Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Sales Dashboard" page to the Security Groups that require the functionality:



For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Utilizing the Sales Dashboard

Navigate to B Menu > Sales Dashboard:



Within the Sales Dashboard, you will see the insight widgets along with search parameters to find specific customer prospects.

Note To ensure the dashboard is showing the prospect data as intended, it is highly recommended that best practices are being followed when creating/managing customer records. This includes but is not limited to:

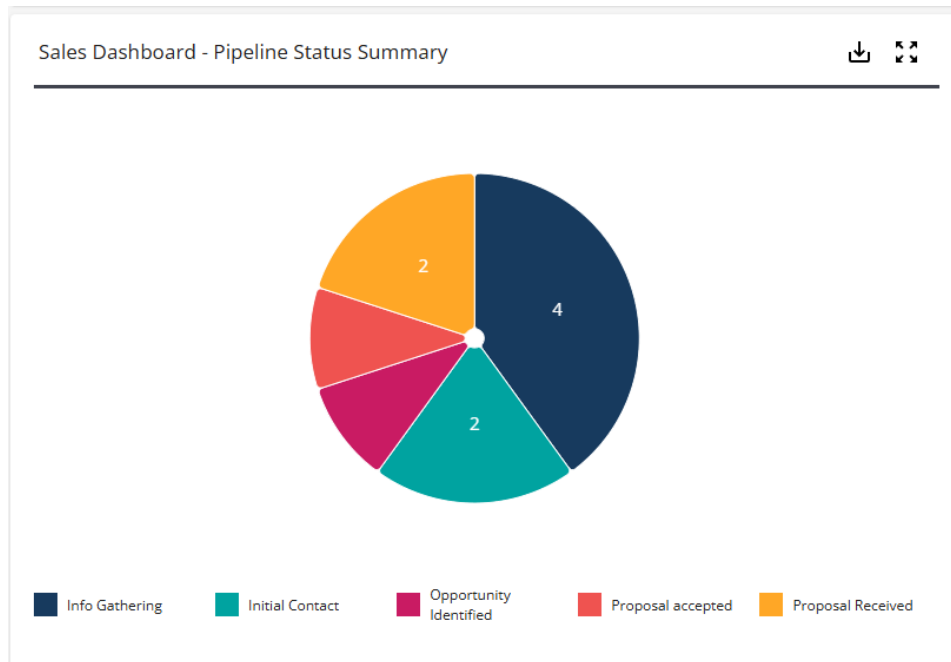
- Adding the intended Account Manager to the customer record via Customer > Visifile > Sales

Information > Account Manager

- Maintaining the intended Sales Pipeline Status via Customer > Visifile > Sales Pipeline > Pipeline Status
- Updating the customer status once the customer is no longer a prospect via Customer > Visifile > Snapshot > Status

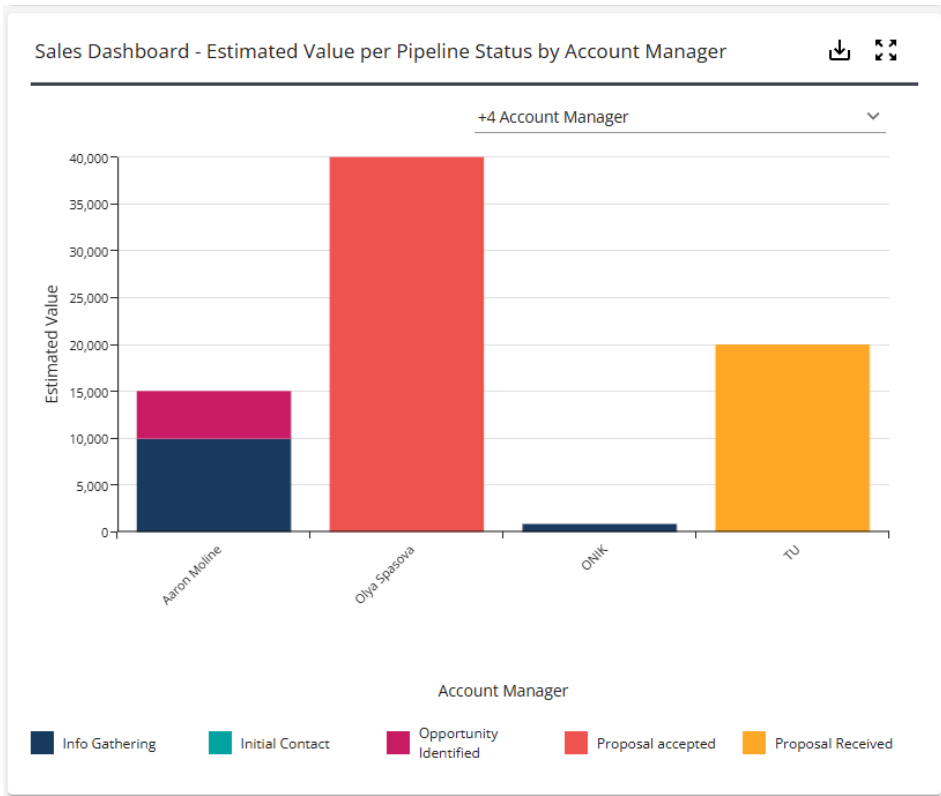
Pipeline Status Summary

Shows, at a glance, the amount of prospect customers within specific Sales Pipeline statuses.



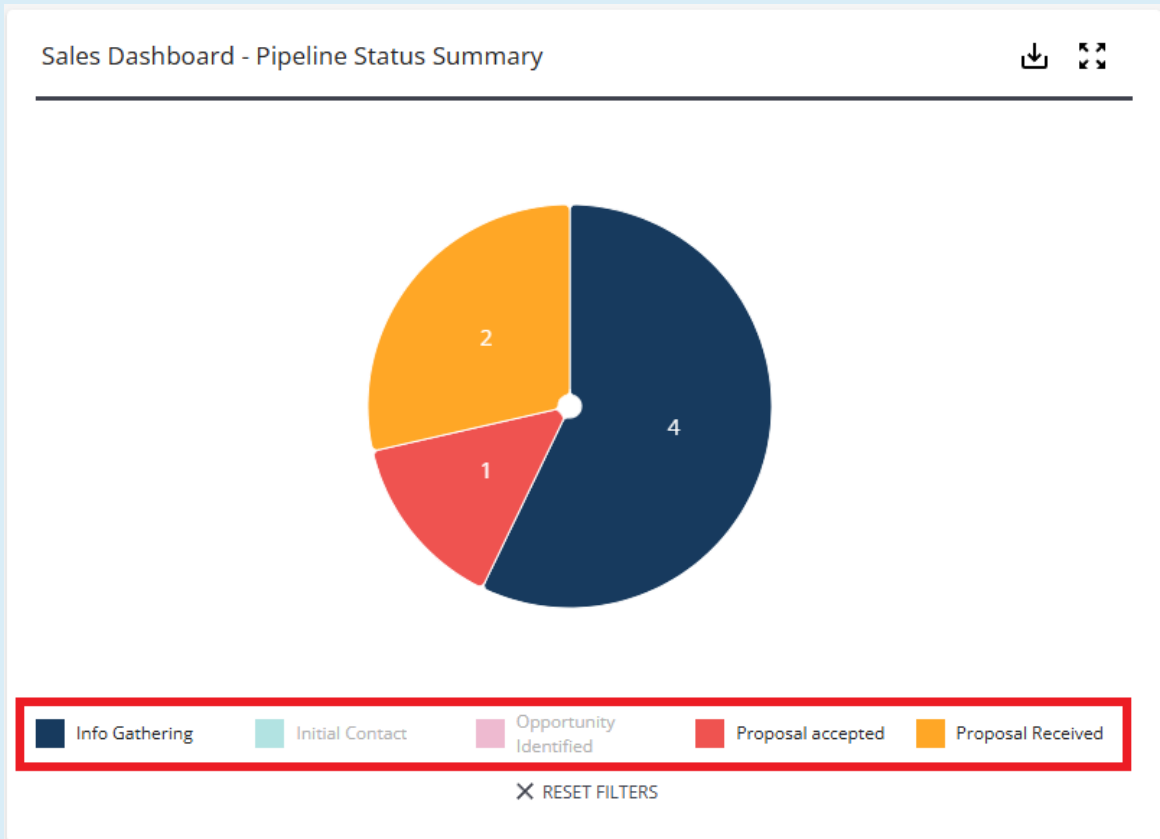
Estimated Value per Pipeline Status by Account Manager

Shows, at a glance, the estimated value of prospect customers per specific Sales Pipeline statuses.



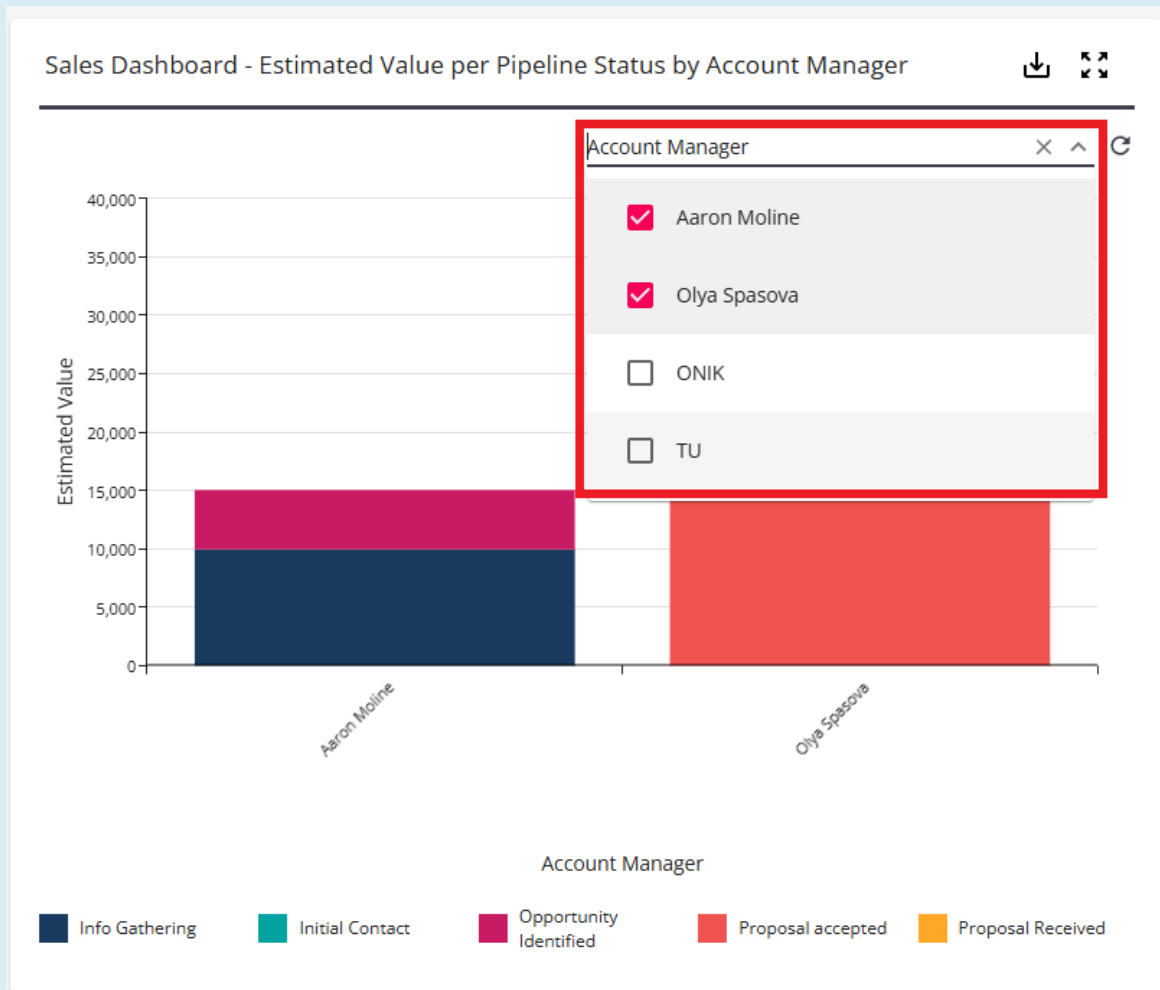
Note The following filtering options are available within the Sales Dashboard:


- Both charts within the Sales Dashboard are able to be filtered by selecting items within the Legend:



- The "Estimated Value per Pipeline Status by Account Manager" bar chart is also able to be filtered by the

values within the x-axis via the dropdown:

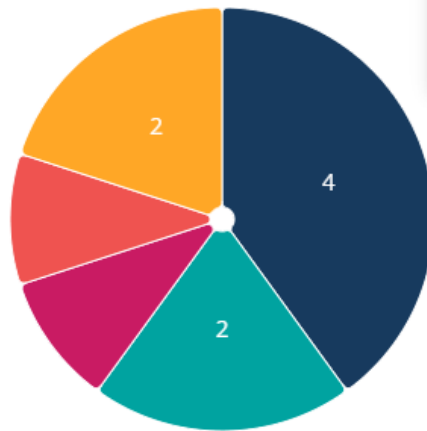


Note Data within the charts are able to be exported to PDF, Excel, or CSV via the  button at the top right of the widget:

Sales Dashboard - Pipeline Status Summary



- Download all data as Excel
- Download all data as CSV
- Print to PDF



■ Info Gathering ■ Initial Contact ■ Opportunity Identified ■ Proposal accepted ■ Proposal Received

- Exporting as a PDF will export the data as an image of the widget as it is presented.
- Exporting as an Excel or CSV file will export **all** of the data, regardless of filters selected within the widget.

Prospect Searching

You can utilize the following search parameters to identify specific prospects:

- Customer Status
- Pipeline Status
- Account Manager
- Sales Team
- Estimated Value Frequency

Account Man... ↑	Customer Id	Full Customer N...	Customer Status	Time as Prospect	Pipeline Status	Time in Pipeline...	Estimated Value	Estimated Value...	Last Message Date
Aaron Moline	4294969444	Aaron's Customer (SHI...	Prospect	44 Days	Info Gathering	35 Days	10,000.00	Monthly	4/16/2024
Aaron Moline	4294969451	Aaron's Customer (Aa...	Prospect	44 Days	Opportunity Identified	44 Days	5,000.00	Monthly	4/16/2024
alan.koren	4295000014	Alan's Sopmething (Pr...	Prospect	44 Days	Info Gathering	35 Days	0.00		4/15/2024
aleksandra marinova	4296215569	ICL (Primary)	Prospect	0 Days			0.00		
aleksandra marinova	4296216005	OLX2 (Primary)	Prospect	0 Days			0.00		
Ali muhumed	4296220986	EI EI (Primary)	Prospect	554 Days			0.00		

You can also right-click on the header to select additional column options:

- Account Manager
- Customer Id
- Full Customer Name
- Customer Status
- Time as Prospect
- Pipeline Status
- Time in Pipeline Status
- Percent Complete
- Estimated Value
- Estimated Value Frequency
- Last Message Date
- How Heard Of
- Sales Team
- Sales Contact

Full Customer N...	Customer Status	Time as Prospect	Pipeline Status	Time in Pipeline...	Estimated Value	Estimated Value...	Last Message Date
Aaron's Customer (SHI...	Prospect	44 Days	Info Gathering	35 Days	10,000.00	Monthly	4/16/2024
Aaron's Customer (Aa...	Prospect	44 Days	Opportunity Identified	44 Days	5,000.00	Monthly	4/16/2024
Alan's Sopmething (Pr...	Prospect	44 Days	Info Gathering	35 Days	0.00		4/15/2024
ICL (Primary)	Prospect	0 Days			0.00		
OLX2 (Primary)	Prospect	0 Days			0.00		

Related Articles