Phase 8 of Major Sales Update: *New* Sales Dashboard

As we wrap up BlueCamroo's major Sales update initiated back in July 2021, we are now introducing a greatly improved version of our Sales Dashboard. Sales is key to any business, and an effective and well-informed sales team is its life force.
A robust Sales Dashboard is an invaluable tool to bring up-to-date sales performance data to salespeople, sales managers, and business owners alike. With a newly devised dashboard, including new graphs and charts, salespeople can easily see where they are relative to their quotas, sales managers can track the performance of their team members, and management can easily oversee the overall sales performance of the entire company.

Key

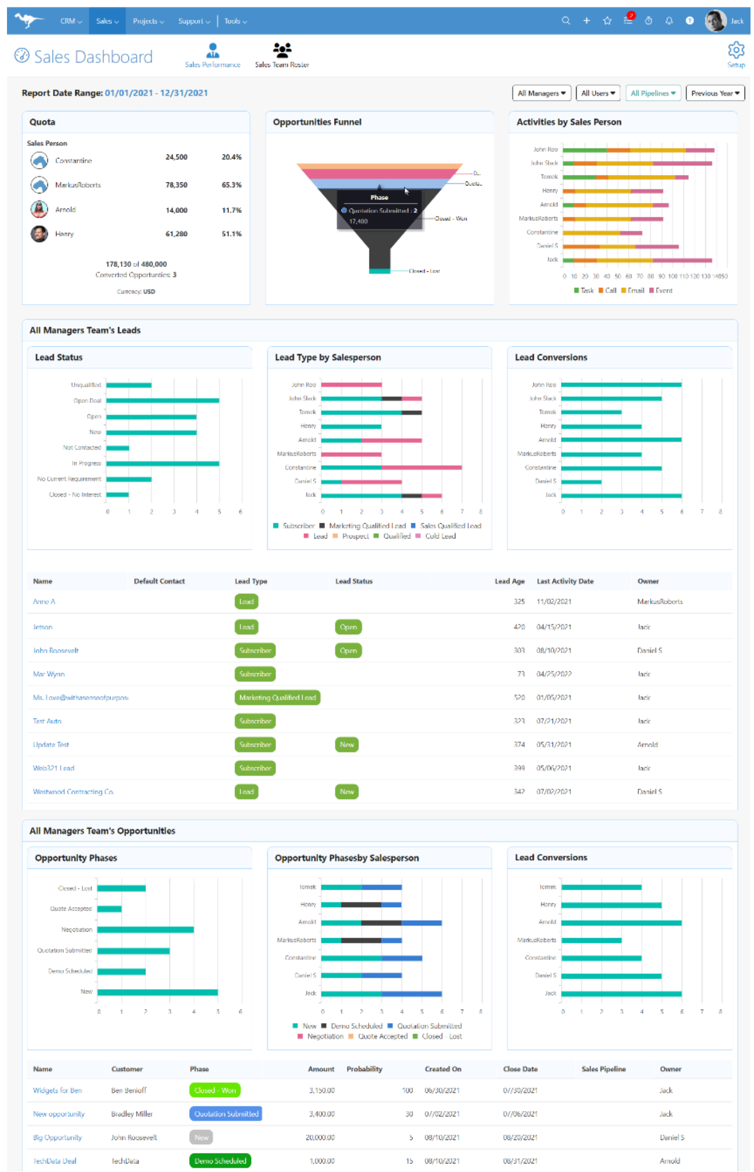
New Feature

Change to Existing Feature

Setup Instructions

Sales Dashboard

Every business is powered by sales, there's no way around that. A sales dashboard gives your sales team one place where they can oversee their sales performance. The newly designed Sales Dashboard was designed to be the central hub for Salespeople, Sales Managers, and Sales Admins to gain insight into key sales performance data, set up sales Quotas for individual salespeople, and organize salespeople into teams under sales managers.



The sales performance reports differ based on the parameters set and the type of user viewing the Sales Dashboard (Salesperson, Sales Manager, or Sales Admin):

- **Salespeople** can track their own performance against their quota.
- **Sales Managers** can track the performance of their team.
- **Sales Admins** can track the sales performance individual salespeople, sales teams under a specific manager, or within the entire company.

The reports can be further customized by specifying the desired pipeline and time period.

We also included a major upgrade to BlueCamroo's charts and graphs, which includes not only a visual update, but also enhanced interactivity triggered with mouseovers.

Reports included in the new Sales Dashboard include:

Quota – This report shows the progress towards the applied Quotas that has been made by the Salesperson/Sales Team/Company.

If you are viewing the Quota report for a specific Sales Team or the Company, you'll see the performance data for each individual Salesperson.

Opportunities Funnel – This report shows the Opportunities that are currently in the Salesperson/Sales Team/Company's funnel. It indicates how many Opportunities are within each phase of the pipeline.

Activities – This report shows a breakdown of the activities that the Salesperson/Sales Team/Company have completed during the selected date range. This includes Tasks, Calls, Emails, and Events.

Lead Status – This report shows the breakdown of Leads by Lead Status for the selected Salesperson/Sales Team/Company.

If you are viewing this report for a specific Sales Team or the Company, you'll see the Lead Type data for each individual Salesperson.

Lead Type – This report shows the breakdown of Leads by Lead Type for the selected Salesperson/Sales Team/Company.

Lead Conversions – This report shows the total number of Leads converted to Customers by the Salesperson/Sales Team/Company during the selected report date range.

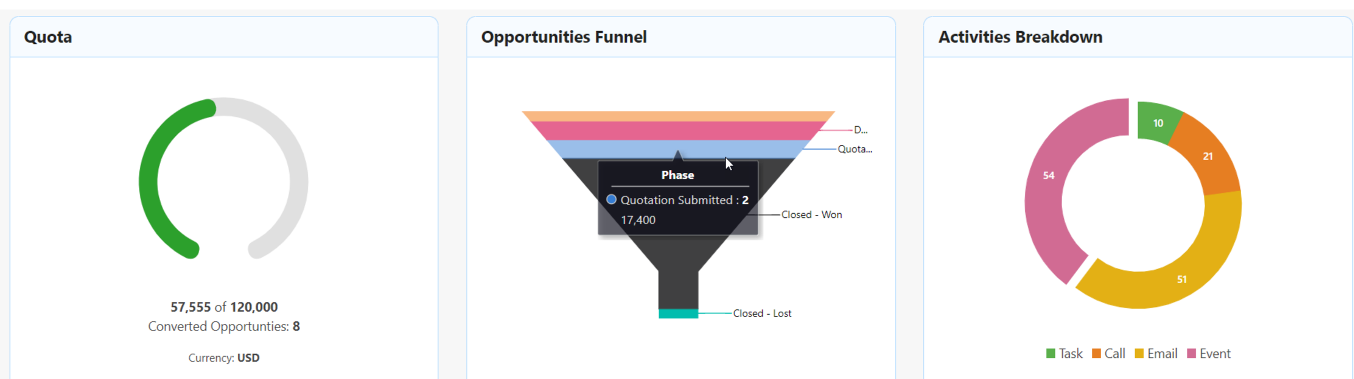
Leads – This displays the list of Leads for the Salesperson/Sales Team/Company.

Opportunity Phases – This report shows the breakdown of Opportunities by Phase for the selected Salesperson/Sales Team/Company.

Opportunity Phases by Salesperson – This report shows the breakdown of Opportunities by Phase for Salesperson or Sales Team.

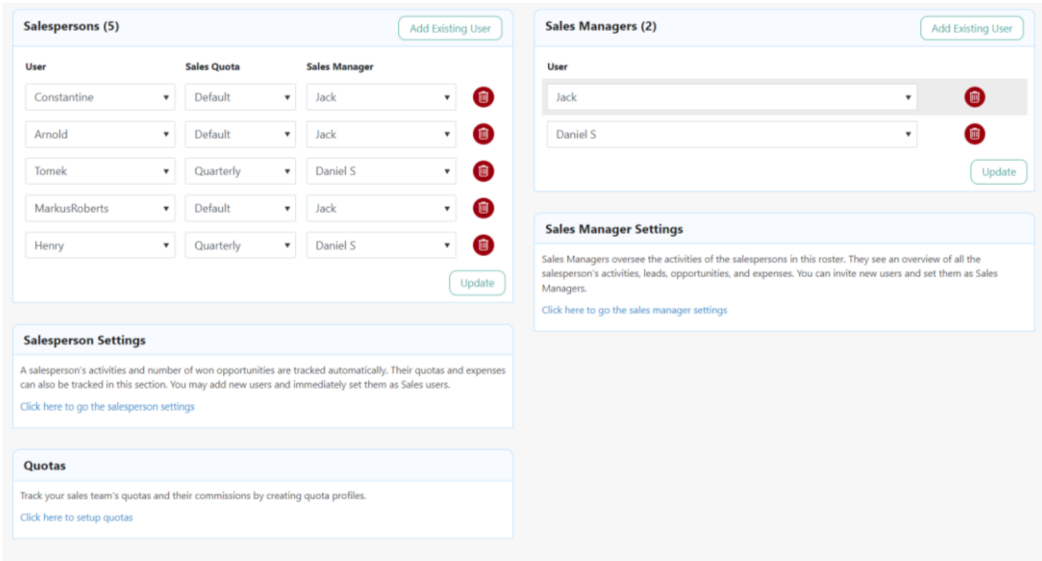
Opportunity Conversions – This report shows the total number of Opportunities converted to Sales Orders (or Projects) by the Salesperson/Sales Team/Company during the selected report date range.

Opportunities – This displays the list of Opportunities for the Salesperson/Sales Team/Company.

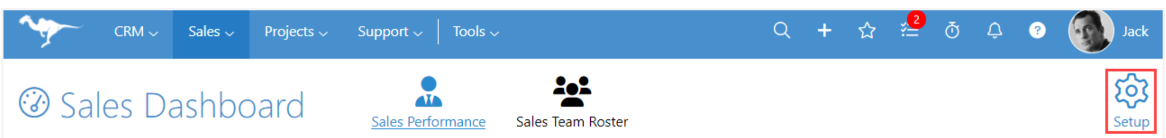


Sales Dashboard

The **Sales Team Roster** enables Sales Administrators to assign Sales Managers and the Salespeople that are assigned to them.
Sales Managers can apply a Sales Quota profile to the Salespeople on their team which will be used in the Quota report in the Sales Dashboard.



Quota Profiles and Commissions can easily be set up by clicking on the Quotas section of the Sales Team Roster, or by clicking on the Setup button found on the top-right of the Sales Dashboard.



You can create as many different Quota Profiles as needed. Quotas can have a cycle of **Monthly**, **Quarterly**, or **Yearly**. If your business utilizes commissions, you can apply a commission type and value to each quota, including:

1. **Absolute** – Flat commission fee for every new sale or conversion, regardless of size of sale
2. **Relative** – Salespersons receive a percentage of a flat commission fee based on the amount of quota they meet. For example, with a monthly quota of $50,000 and a commission of $10,000, if a Salesperson meets 75% of their quota, they receive $7,500 as their commission
3. **Straight** – A percentage of total sale is granted as commission
4. **Tiered** – Progressive percentages of sales based on sale value. For example, 5% commission on sales under $50,000; 7% on sales between $50,000 and $80,000; and 10% on sales above $80,000.

We hope you will enjoy BlueCamroo 8.3.8, if you have any questions about this release, or if you have any suggestions or comments, please send an email to support@bluecamroo.com. We'll be glad to help!

The BlueCamroo Team