

# Sales Dash Board

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## Installation and Usage

**Sales Dash Board** provides a graphical display of sales performance-to-target.

As an individual sales rep, now that you're tracking your sales opportunities through the pipeline, and "closing" your deals in your ACT! database, don't you want to know how close you are to making your quota? Are you "on track" this week? This month? This quarter? This year?

As a sales manager, how is your team doing at meeting quota? Will YOU make your quota this week? This month? How about each of your sales reps? Is each of them "on track" for the quarter? For the year?

**Sales Dash Board** provides a graphical display of revenue from "closed" sales – as a percentage of quotas. Options and preferences can be set to control the period(s) to be displayed, and the orientation and many other facets of the display. Set a single quota to be used for each sales rep, or determine individual period quotas from values stored on the sales rep's contact record.

**Sales Dash Board** provides an clear but unobtrusive picture of sales performance, based on closed sales in an ACT! database.

## Installation


1. Shut down all running programs
2. Run **Install\_SalesDashboard.exe**
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

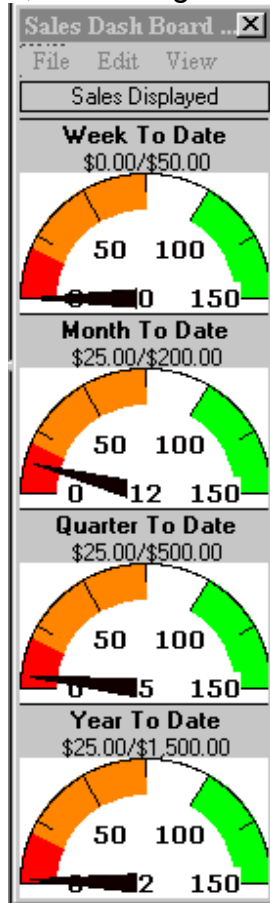
This will install **c:\program files\tnhg\SalesDashboard.exe** on your hard-drive, and add the SalesDashboard.exe program as an ACT! custom command. It will

also put the SalesDashboard icon  on the toolbar, and adds "SalesDashboard" as an item on the Sales menu, of the Contacts View.

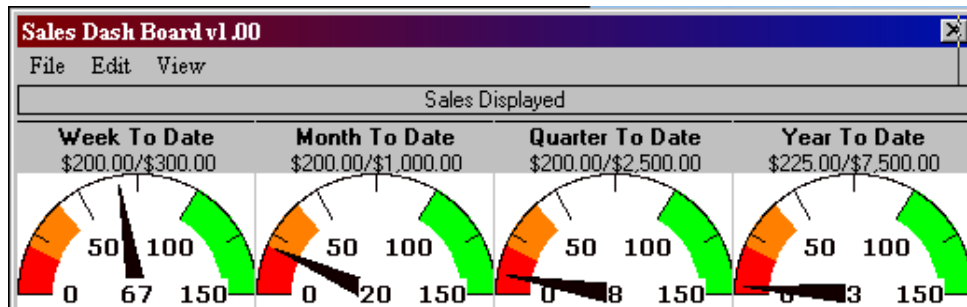
# Usage

To use **Sales Dash Board** the first time, start ACT! and open any available ACT!

database. Click the Sales Dash Board icon  on the Contact View toolbar, or choose SalesDashBoard from the Sales menu. Sales Dash Board will start, and display a “column” of 4 “gauges”, something like this:



You can resize this window using your mouse and standard window “dragging” techniques. As you make the window too “short” to display all the gauges, the window will switch to a horizontal orientation.



You can also drag the edge of the window to force a 2x2 “grid”. You can drag the entire display to your preferred location on your desktop.

## Configuration, Options and Preferences

### File Menu

Select the File menu , Open option if you want to gather sales figures from a database other than the one currently in use.

Select the File menu, Register option to register your copy of Sales Dash Board, and prevent the “nag screen” from appearing periodically. The registration window will open, showing you the HardwareID and ProgramID used to generate your Registration Code. Click the [Print RegForm] button to open a Notepad window showing all the information necessary to obtain the registration code, and follow the instructions displayed.

Select the File menu, Exit option to shut down Sales Dash Board.

### Edit > Preferences

Select the Edit menu, Preferences option. The Preferences window will open:

The screenshot shows the 'Sales Dash Board Preferences' dialog box. It is divided into several sections:

- Target Amounts:** This section is divided into four quadrants for different time periods: Weekly Target, Monthly Target, Quarterly Target, and Annual Target. Each quadrant has two radio button options: 'Specific Amount' (selected) and 'Field value from user's My Record'. Below each radio button is a text input field for a monetary value and a 'Times' spinner set to 1. For example, the Weekly Target is set to \$300.00.
- Source Database:** This section has two radio button options: 'Currently open database' and 'Specific database' (selected). Below is a text input field containing the path 'D:\ACTDatabases\AddOnDemo.dbf' and a 'Browse' button.
- Gauge Options:** This section contains two sliders for 'Danger Reading (%)' and 'Warning Reading (%)'. Below the sliders is a section for 'Gauge Readings' with three options: 'Display Absolute percentages' (selected), 'Display Weighted percentages', and a checked checkbox for 'Also show amounts as text'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Here you will control how Sales Dash Board will operate. You can control the Targets against which the sales revenue is measured, the source of the sales revenue figures, the 'warning' and 'danger' zones on the gauges, and whether the gauge should show an absolute or 'weighted' percentage.

## Target Amounts

You have complete control over how the target amounts are to be determined. You can specify a specific amount for each of the 4 periods by entering that amount in the appropriate field, and selecting the "specific amount" option for that period. (In the example above, the weekly quota is set at \$300.)

Or, you can set the quota amount in a field on the Sales Rep's contact record. Select the "Field Value from User's My Record" option, then choose the correct field from the dropdown list of fields. You might have separate fields for Weekly, Monthly, Quarterly and Annual quotas, in which case each period would have a different field selected. Or, you might set a single field to the Weekly quota, and choose that single field for all 4 periods – along with setting the Multiply By figure to 1 for the Weekly period, 4 for the Monthly period, 13 for the Quarterly period, and 52 for the Annual period. Or any combination or permutation of the above.

## Source Database

If you "work in" the database that is to be used to determine actual sales revenue-to-date (and possibly the target amounts), then you can choose the "Currently Open Database" option, and Sales Dash Board will always refer to whatever ACT! database is currently open and active.

If you want Sales Dash Board to keep you up-to-date on sales figures in another database, or if you don't have ACT! open all the time (say what?), then you can choose the "Specific database" option, and "browse" to select which available database should be used. (You will be required to provide a username and password for any multi-user database you specify).

## Gauge Options

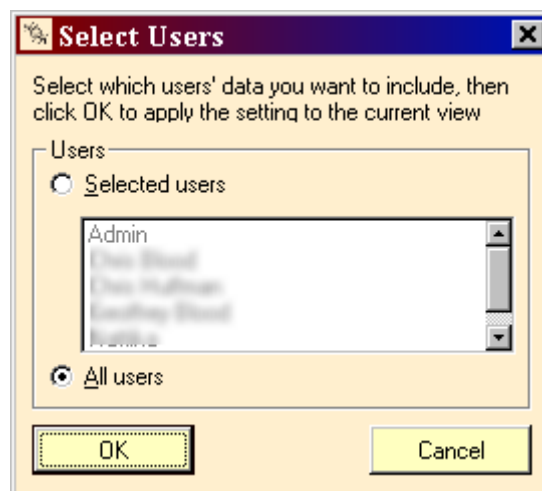
You can control the "warning" and "danger" zones of the gauge display, but dragging the slider for each zone to the desired value. Note that the "danger zone" cannot be more than the "warning zone", and changes to either value that violate this "rule" will cause the other value to self-adjust.

If you are performing at 5% of target on the first day of the month, you may be in pretty good shape. If you are at 5% of target on the last day of the month, you may be in pretty BAD shape. The 5% figure as an ABSOLUTE PERCENTAGE may not be a clear indicator of performance. Therefore, you may want to show a WEIGHTED PERCENTAGE instead. For example, assume your weekly quota is \$1000 and your closed sales' amounts total to \$500. On Monday, which is 20% of the way through the week, your "weighted weekly quota" is 20% of your weekly quota, or \$200. Your "weighted percentage" is \$500 compared to \$200, or 250%! GOOD WORK! However, on Thursday, which is 80% of the way through the week, your "weighted weekly quota" is 80% of your weekly quota, or \$800. Now, your weighted percentage is \$500 compared to \$800, or only 62.5% - not so good! If you choose the "absolute percentage" option, the gauge shows 50% on either day. With the "weighted percentage" option, the gauge shows 250% on Monday, 125% on Tuesday, 83% on Wednesday, 62.5% on Thursday, and 50% on Friday.

Finally, you can choose to show the actual figures along with the graphical gauge. Or, you can choose not to display these numbers. Simple check or uncheck the option as appropriate.

### Edit > Select Users

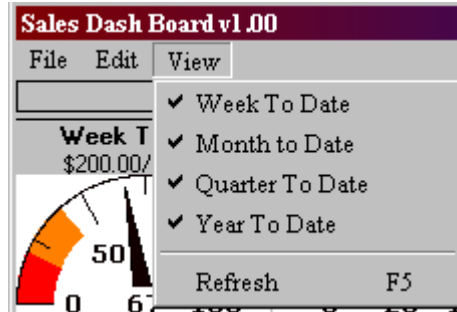
Select the Edit menu, Select Users option, and the window opens that lets you select which users/sales reps to include in the sales total amounts to be used in determining performance.



To include all closed sales for all users of the selected database, select the "All users" option, as in the picture above. However, if you want to see just your own sales, or only the sales by a selected one or more user(s), the select the "Selected users" option and then pick the appropriate user(s) from the list. You can click on a name to include that user and Ctrl-click on additional names to include more than one.

## View Menu

The View menu lets you include/exclude one or more of the gauges.



Click on an option to “toggle” the checkmark on or off. When an item is “checked”, the corresponding gauge will be included in the dash board display.

The Refresh option on the View menu is used to force a recalculation of the percentages displayed. You can use this throughout the day to tell Sales Dash Board to update the numbers used in determining both the amount of closed sales and the quota numbers. Whenever you close the Preferences window from the Edit menu, and whenever you open a database using the File > Open menu, Sales Dash Board scans the selected database and performs calculations based on your preferences. If you want to get a refreshed, up-to-the-minute snapshot at any other time, simple use the View > Refresh option, or tap the F5 key.