Sales Rep Lists & Dashboards

The below mentioned list should be created, saved, and shared with the respective roles. Any of these lists can be customized with additional filters to focus the list on specific branches, divisions, sales reps, account managers, etc. In several of the advanced search list screenshots below, you will see the filter "Current User". This will filter the results to the user who is logged in and viewing that list. You can swap out "Current User" with your actual name if preferred. Display columns, sorting, and grouping is at the user's discretion. These lists should be managed on regular intervals determined on your specific needs.

Records Search	Filter	Display	Sort	Group	List drop down
Q Search...	⇳	▥	↕	⏣	Default (All Opps) [System] * ⌄

Activities
- My Open Tasks
- My Open Issues

Opportunity
- My Sales Pipeline
- My Aging Pipeline

Contacts
- My Prospects

Properties
- My Prospects

Reports
- My Scorecards

Activities – My Open Tasks

Concept - This list shows all of your tasks that have not been completed. Tip* display and sort by due date.
Action – If task is complete, check the green check box in the bottom right corner.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Activity Type	In	Task
2	Assigned To Contact	In	(Current User)
3	Status	In	Open
	Select One		

CLEAR ALL   CANCEL   APPLY

Activities – My Open Issues

Concept - This list shows all of your issues that have not been completed. Tip* display and sort by due date.
Action – If issue is complete, check the green check box in the bottom right corner.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE
1	Activity Type	In	Issue
2	Assigned To Contact	In	(Current User)
3	Status	In	Open
	Select One		

CLEAR ALL   CANCEL   APPLY

Opportunity – My Sales Pipeline

Concept – This list is used to view all opportunities that have not been won or lost. Tip* Group by status name and display last activity, next activity, proposed date, new task, new email, and other relative fields to optimize pipeline management
Action – Win or lose when applicable.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE	
1	Status Name	Not In ⌄	Lost, Won ⌄	🗑
2	Sales Rep Name	In ⌄	(Current User) ⌄	🗑
	Select One ⌄			

CLEAR ALL   CANCEL   **APPLY**

Opportunity – My Aging Pipeline

Concept – This list is used to view all opportunities that have been proposed but not won. Tip* Display and sort by proposed date. Create a process to lose if not won after a certain amount of days have passed since the proposed/delivered date.
Action – Win or lose when applicable.

Filter

Condition (optional)

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE	
1	Sales Rep Name	In ⌄	(Current User) ⌄	🗑
2	Status Name	In ⌄	Delivered ⌄	🗑
	Select One ⌄			

CLEAR ALL   CANCEL   **APPLY**

Contacts – My Prospects

Concept – This list is used to view all of your active leads. Tip* Display new task, new appt, and new email to quickly create activities with your contacts.
Action – Bulk email campaigns, managing contact type/status, and general CRM activities.

Filter ⊗

Condition (optional)

[   ]

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE	
⠿ 1	Active	Equals ⌄	YES ⌄	🗑
⠿ 2	Contact Type	In ⌄	Prospect ⌄	🗑
⠿ 3	Owner Name	In ⌄	(Current User) ⌄	🗑
	Select One ⌄			

CLEAR ALL   CANCEL   **APPLY**

Properties – My Prospects

Concept – This list is used to view all of your active prospects. Tip* Display new task, new appt, new email, and new issue to quickly create activities regarding your properties.
Action - Create general CRM activity, manage customer status, preform take offs, and create estimates.

Filter ⊗

Condition (optional)

[   ]

Example: 1 AND (2 or 3)

ORDER #	FIELD NAME	FILTER TYPE	VALUE	
⠿ 1	Active	Equals ⌄	YES ⌄	🗑
⠿ 2	Status	In ⌄	Prospect ⌄	🗑
⠿ 3	Account Owner Name	In ⌄	(Current User) ⌄	🗑
	Select One ⌄			

CLEAR ALL   CANCEL   **APPLY**

Scorecards

Concept – Sales scorecards is a sales tool that compares proposed goals vs proposed actual and closed goal vs closed actual. Sale scorecards are created for each sales rep on their contact page, and can be focused to specific divisions and sales types. All scorecards have a beginning year/month that ends 12 months later. Any number of scorecards can be created for a single sales rep. For Example, a sales rep could have 3 different scorecards: New enhancement sales, New contract maintenance sales, and Contract maintenance renewal sales. A sales manager would manually enter the proposed goal and closed goal for each month on each scorecard. Aspire will automatically fill in the actuals based on system activity. These scorecards can be turned into dashboards for the individual sales rep to monitor their own progress. In addition, a sales manager can use the Sales Scorecard KPI to compare multiple sales scorecards in one chart.   See examples below:

Sales Scorecard Travis Wills   🖫 SAVE

		Sales Type	Division	Sales Starting Month
❮ 2021 ❯		All Sales Type	All Divisions	January

MONTH	PROPOSED GOAL	PROPOSED ACTUAL	CLOSED GOAL	CLOSED ACTUAL
January	$125,000.00	$133,114.91	$51,000.00	$53,927.28
February	$75,000.00	$0.00	$35,000.00	$0.00
March	$125,000.00	$0.00	$75,000.00	$0.00
April	$150,000.00	$0.00	$80,000.00	$0.00
May	$100,000.00	$0.00	$55,000.00	$0.00

Dashboard and KPI Example

Travis W Proposed

Last Updated 01/08/2021 11:46:55 AM

$133,115
$125,000

Department Scorecard - This Month (1/1/2021 - 1/31/2021)

Last Updated 1/8/2021 12:36PM

Budget — Actual