



Project-SalesAchiever CRM

Dashboards



Project-SalesAchiever 

Project-SalesAchiever CRM Dashboards, puts your finger on your business pulse

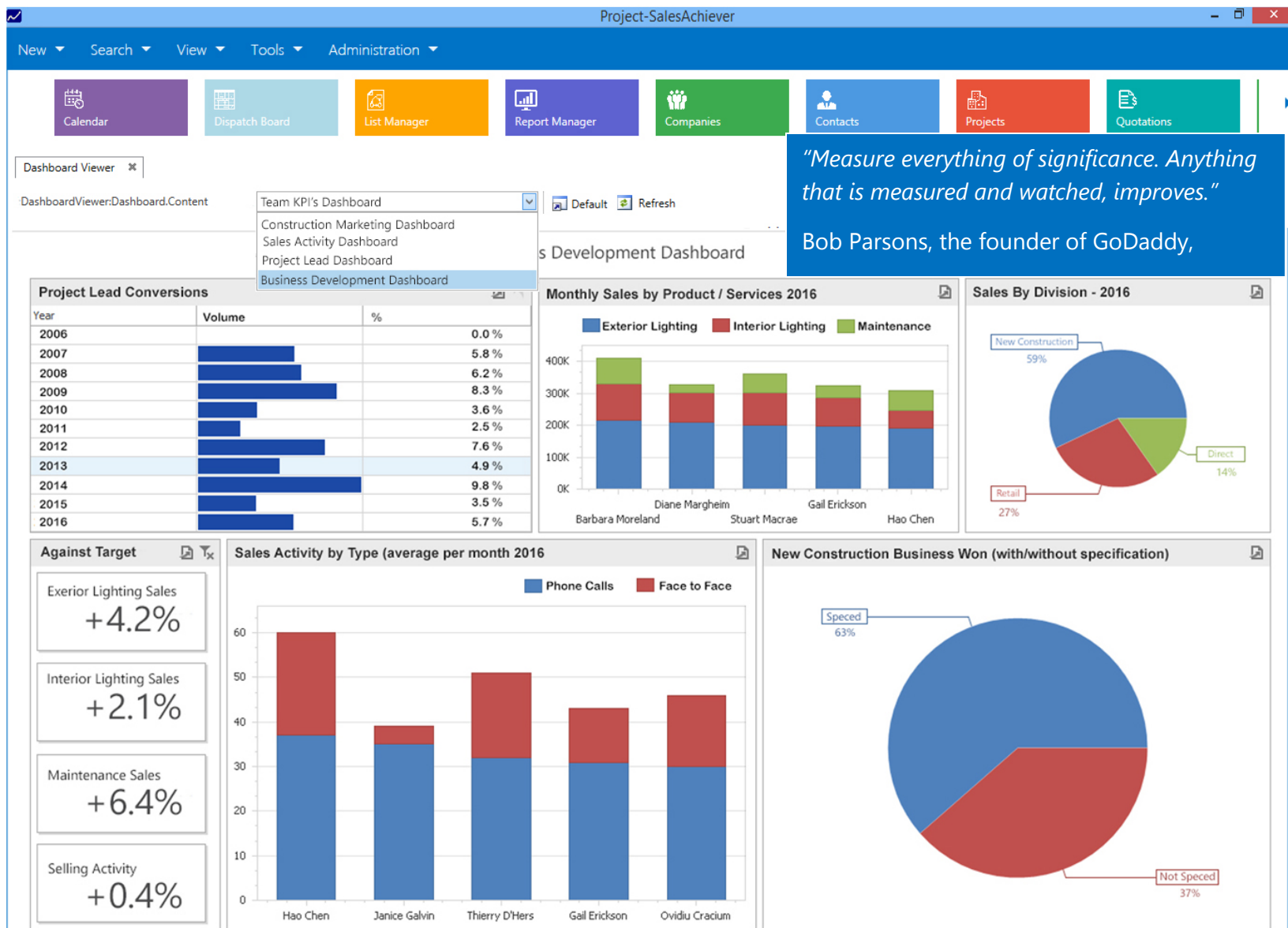
The latest Dashboard update in Project-SalesAchiever gives users striking visual reports that translate your data into meaningful and actionable information that can be shared across the business or customised for specific users.

Your dashboards give management and front end users an instant reading on the state of the business, what processes work and what don't, where best to spend time and resources. They will give you answers to business critical questions such as:

- Marketing campaign updates
- Selling activity versus results
- Project Lead Pipeline



Well designed dashboards will give you a live view on what is working in your business and what isn't. You will have the agility to stop what's not successful and enhance what is.

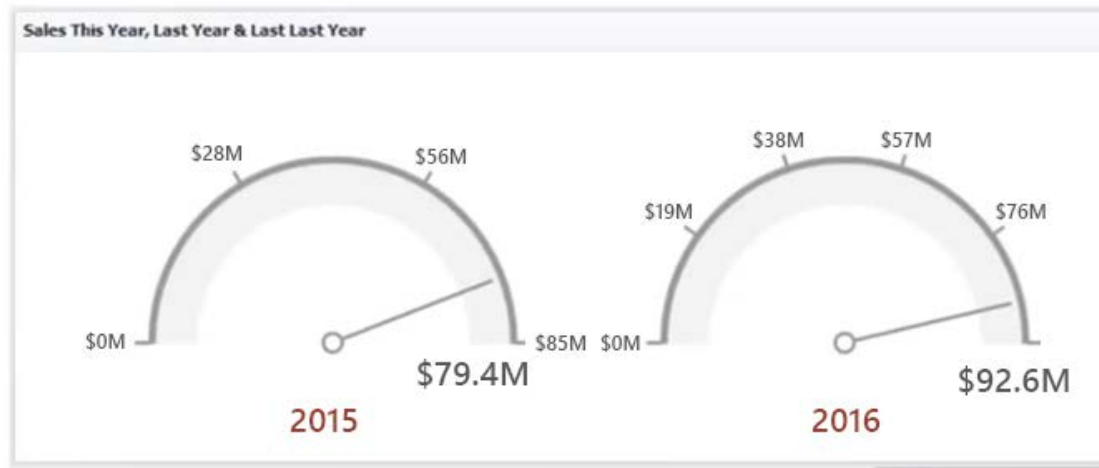


"Measure everything of significance. Anything that is measured and watched, improves."

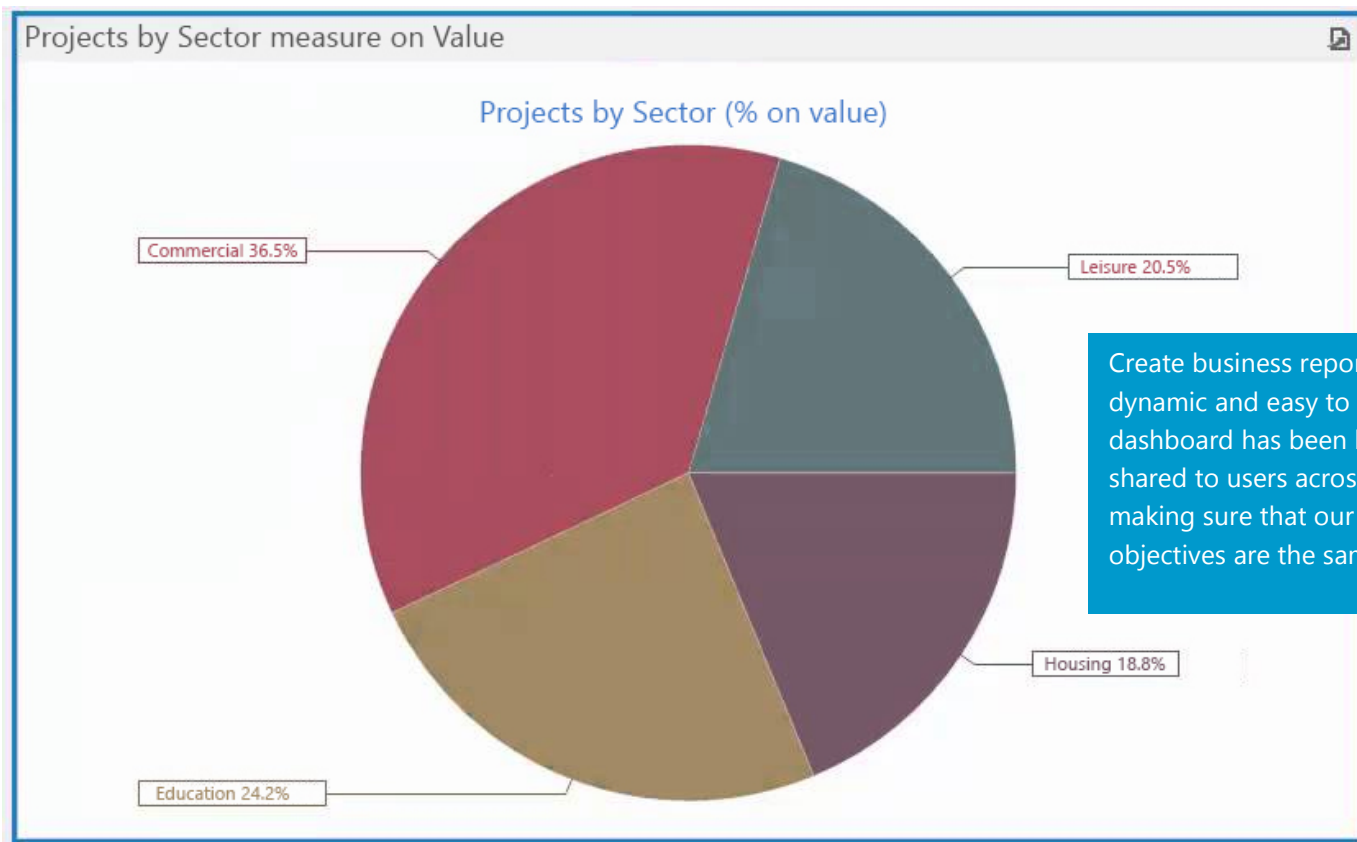
Bob Parsons, the founder of GoDaddy,

Save time building Excel spreadsheets and create live and dynamic reports based on your information

Visualizing sales information makes it easy to understand. Integration information into part of a daily view, keeps business objectives high on the agenda.



Knowing which sectors are hot or not, gives the teams areas to focus on, whether front end selling, targeted marketing with industry specific marketing material or understanding product and service demand based on the current popular construction verticals .



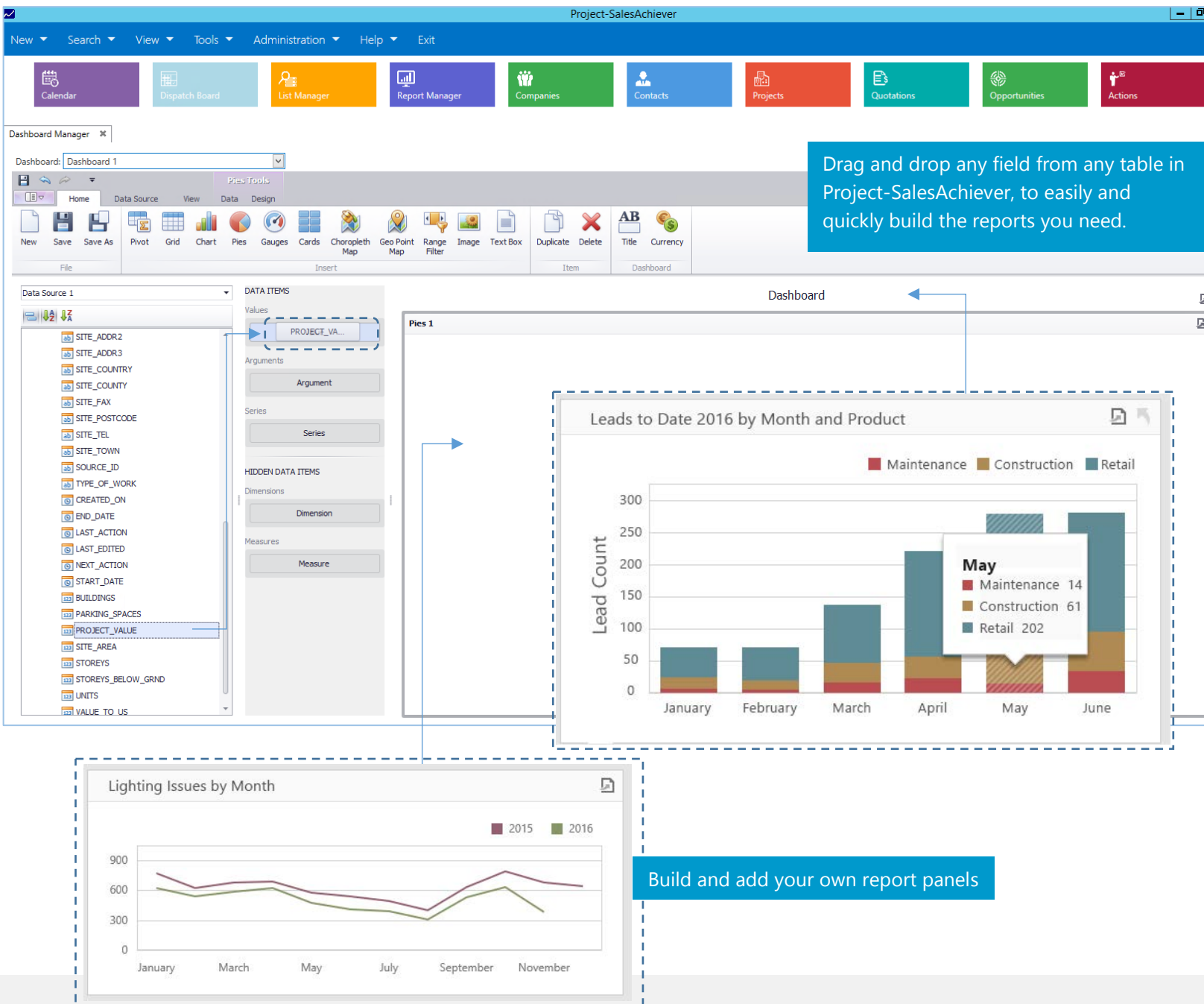
Dashboard View

A Dashboard 'view' mode will enable a user to see Dashboards that have been created and shared with them. The Dashboard view means the user cannot alter the dashboard which is set to a global company view. A user dashboard can be set as the default dashboard for that user.

Dashboard Manager

The Dashboard Manager allows a System administrator or customizer to build and share multiple dashboards of varying sophistication. All fields and tables in the Project-SalesAchiever CRM are fully accessible and data can be presented visually in various stunning report formats.

Build your own dashboards, your way, with your data



The screenshot displays the Project-SalesAchiever Dashboard Manager interface. At the top, there is a navigation menu with options like New, Search, View, Tools, Administration, Help, and Exit. Below this is a toolbar with various report formats: Calendar, Dispatch Board, List Manager, Report Manager, Companies, Contacts, Projects, Quotations, Opportunities, and Actions. The main workspace is titled 'Dashboard Manager' and shows a 'Dashboard 1' being edited. A 'Data Source 1' panel on the left lists various fields like SITE_ADDR2, SITE_COUNTRY, and PROJECT_VALUE. A 'DATA ITEMS' panel in the center allows users to drag and drop fields into 'Values', 'Arguments', 'Series', 'Dimensions', and 'Measures' sections. A 'Dashboard' panel on the right shows a preview of the dashboard with two report panels: 'Leads to Date 2016 by Month and Product' and 'Lighting Issues by Month'. A blue callout box points to the 'Leads to Date 2016 by Month and Product' chart, stating: 'Drag and drop any field from any table in Project-SalesAchiever, to easily and quickly build the reports you need.' The 'Leads to Date 2016 by Month and Product' chart is a stacked bar chart showing Lead Count by Month (January to June) for three product categories: Maintenance (red), Construction (brown), and Retail (blue). A tooltip for May shows: Maintenance 14, Construction 61, and Retail 202. The 'Lighting Issues by Month' chart is a line chart showing the number of lighting issues by month for the years 2015 (red line) and 2016 (green line). A blue callout box points to this chart, stating: 'Build and add your own report panels'.



Dashboard Design Consultancy and Delivery Training Available

SalesAchiever has 30 years experience in working in the Construction Industry globally, and we can help you mine the information you need, get the answers to the business critical questions for every individual in the business. The latest update to the Dashboard feature will give your business the capability to tap into the real underlying power of Project-SalesAchiever CRM. Training and consultancy sessions are available, just contact your Account Manager to discuss.



Call us today to discuss how to make your data more valuable

UNITED STATES

1635 Foxtrail Drive #352
Loveland, CO 80538
United States
1-800-915-3597

CANADA

1959 Upper Water Street
Suite 1700
Halifax, Nova Scotia
B3J 3N2
Canada
1-800-915-3597

UNITED KINGDOM

Bloxham Mill Business Centre
Barford Road
Bloxham, Banbury
Oxfordshire, OX15 4FF
United Kingdom
44-800-242-5119

Email: info@constructioncrm.com
Or contact your Account Manager for more information