

DIFFERENT DASHBOARDS AND THEIR USAGE

DASHBOARDS TO BE MADE FAMILIAR WITH

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Site Visit Dashboard

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Geo Tracking
Dashboard

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Leads Dashboard

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Sales Dashboard

5

My Team Interaction
Dashboard

6

Calling Dashboard

SITE VISIT DASHBOARD

**SHOWS THE PLANNED AND
ACHIEVED SITE VISITS**

SITE VISIT DASHBOARD

Square Beats
More Apps ▾ Latest Beats App ▾ Incentive Slabs Square HR Training ▾ Help Desk My Profile My Team Apoorva Purohit ▾

Apoorva Purohit
Online

Employee Search ...

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- [My Reservations](#)
- [Admin](#)
- [Sales](#)
- [My Leads](#)
- [Returned Leads](#)
- [My RSVP/Responses](#)
- [My Team Interaction](#)
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- [Geo Tracker](#)
- [My Bookings\(Focus Projects\)](#)
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- [HR](#)

Site Visit Dashboard

Date

To

Employee Name\Code

Employee Location

Show entries Search:

Employee Name	Employee Code	T2/T3 Name	Lvl	P&L Head	Location	Total		Shriram Liberty Square		Other	
						Planned(4)	Actual(0)	Planned(1)	Actual(0)	Planned(3)	Actual(0)
Chaman Chawla	SQY4051	Pradeep Jayan (SDC1640)	T1	Rajat Likhyan	Bangalore	1	0	0	0	1	0
NIVEDITHA S B	SQY4237	Pradeep Jayan (SDC1640)	T0	Rajat Likhyan	Bangalore	0	0	0	0	0	0
Rashmi N S	SQY3205	Pradeep Jayan (SDC1640)	T0	Rajat Likhyan	Bangalore	2	0	1	0	1	0
Sunil Kumar	SQY3794	Pradeep Jayan (SDC1640)	T0	Rajat Likhyan	Bangalore	1	0	0	0	1	0
Vineeth A	SQY4210	Pradeep Jayan (SDC1640)	T0	Rajat Likhyan	Bangalore	0	0	0	0	0	0

Showing 1 to 5 of 5 entries Previous Next

SV Dashboard

FOS and Team Details

Total Site Visits Planned

SVs Project Wise

Export Details

TRACKS FOS (T0, T1) ACTIVITY LOCATIONS

GEO TRACKER

Employee Search ...

Home

My Reservations

Admin

Sales

My Leads

Returned Leads

My RSVP/Responses

My Team Interaction

Calling Dashboard

Geo Tracker

My Bookings(Focus Projects)

Site Visit Dashboard

HR

Geo Tracker

Sales > Geo Tracker

Employee Name/Code: Chaman Chawla

Location: Select

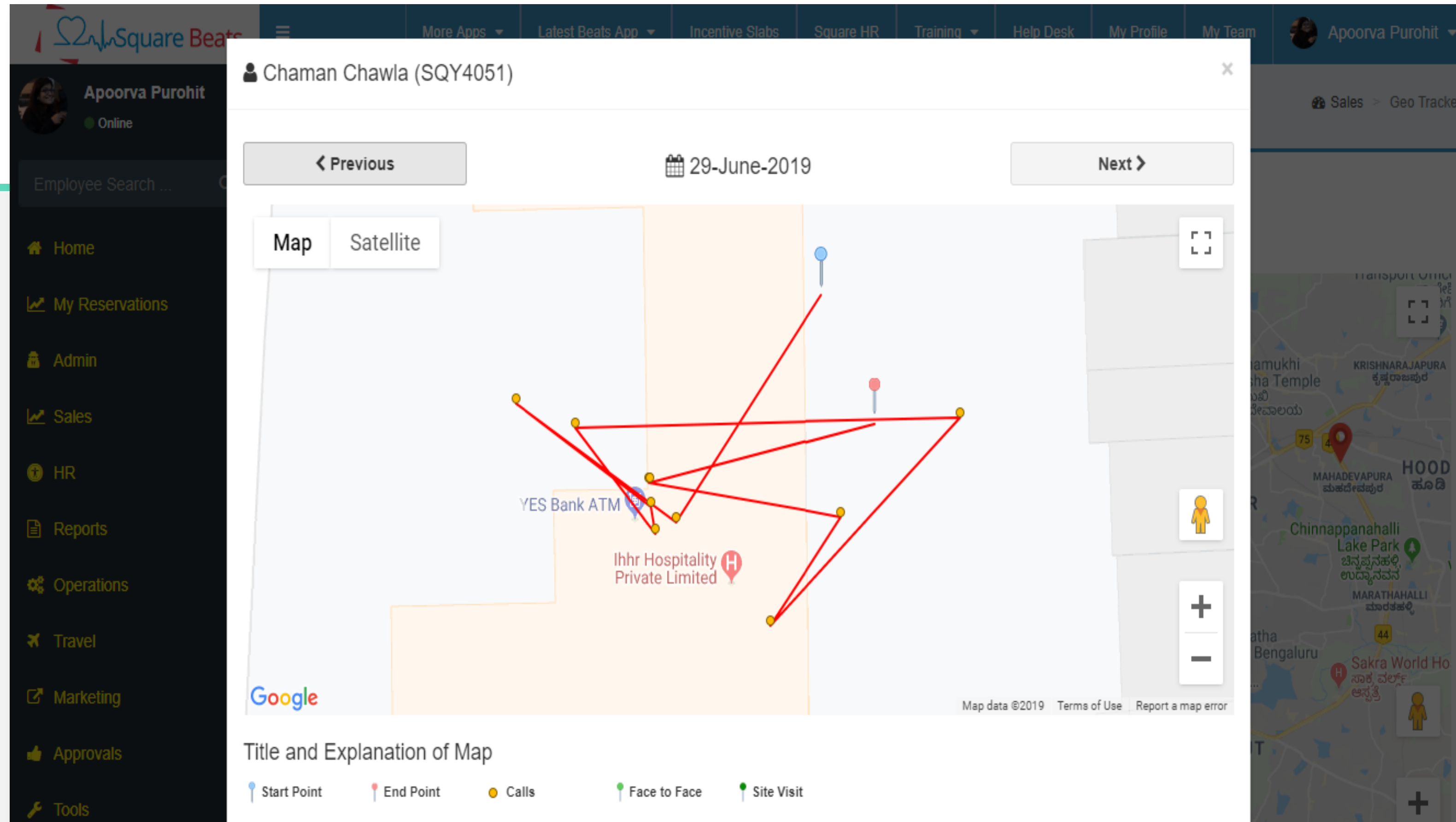
Filter

Employee Name	Location	
Rashmi N S (SQY3205)	Bangalore	📍
Sunil Kumar (SQY3794)	Bangalore	📍
Chaman Chawla (SQY4051)	Bangalore	📍
Vineeth A (SQY4210)	Bangalore	📍
NIVEDITHA S B (SQY4237)	Bangalore	📍

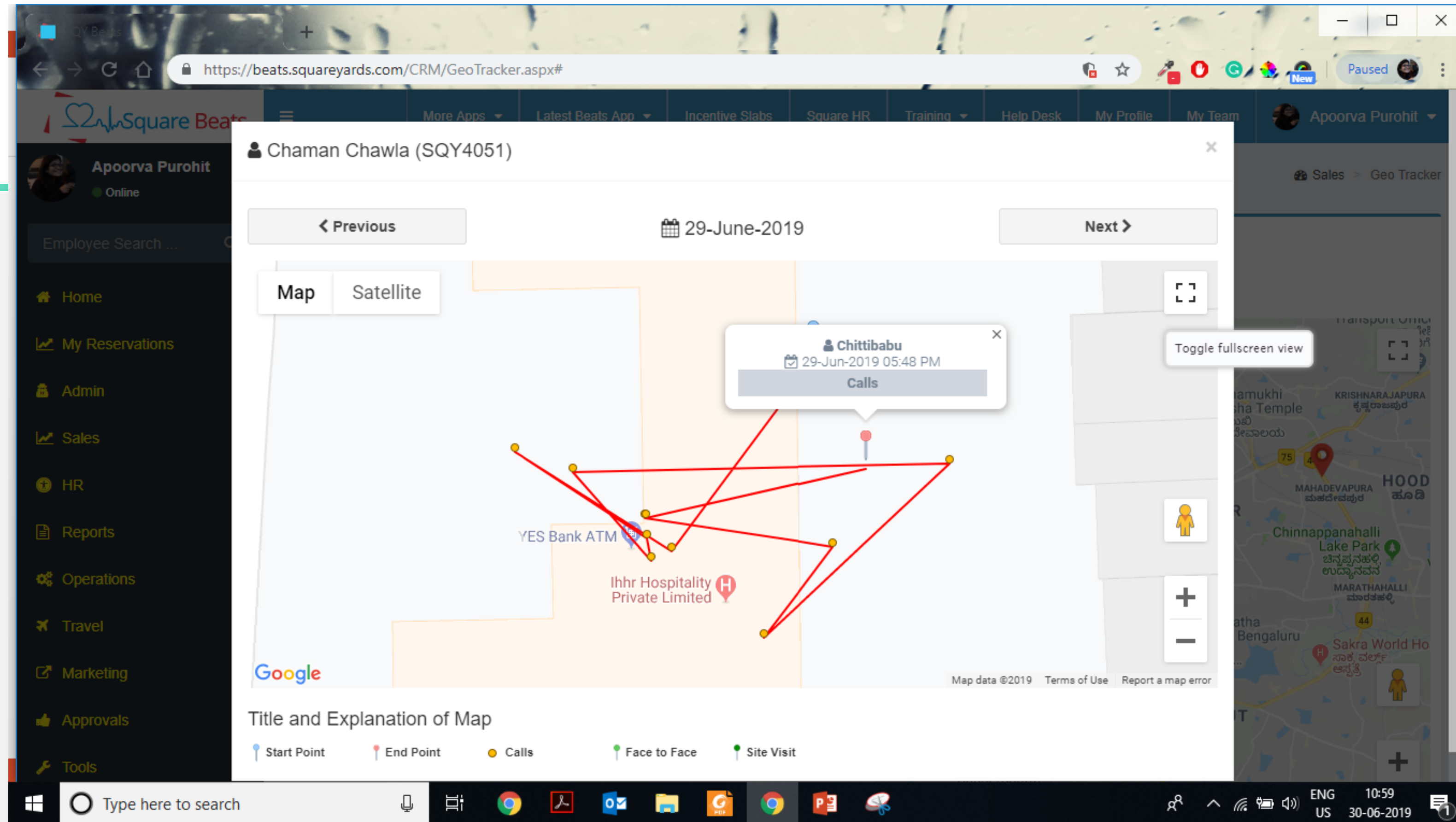
Map Satellite

Bangaluru ಬೆಂಗಳೂರು

Team's Geo Tracker
Click on GREEN location Point



Geo Tracker – It captures the location of FOS where the activity(Call,F2F,SV) gets updated.



On hover, Pin point icon shows what activity done, punch in time and client name.

LEADS DASHBBOARD

PROVIDES INFORMATION ON INPUT MATRICES

LEADS DASHBOARD

Leads Dashboard

Employee Name: Clifard Rancy Pinto

Date Range: 07 Jun 2019 To 01 Jul 2019

Employee	Team	FOS	Act Leads	Leads	Met %	CP Mtgs	Lead Mtgs	Total Mtgs	Avg Mt	Calls	Unq F2F	Total	Talked 1	UnTouch 24	R wo Call	Avg FTTR
Clifard Rancy Pinto (Bangalore - B)	1	1	47	45	2%	0	15	15	0.60	44.4	13	101	35	36	10	12.5

Header Text	DESC	Date Range
Employee	EmployeeName	
Team	Team Includes ('T0','T1','T2','T3','T4','T5','P&L','TE','TR','TES')	
FOS	FOS Includes Emplevel ('T0','T1')	
Act Leads	LeadStatus IN (New,Cold,Warm,Hot), Current alive leads	All
Leads	TotalLeads - Retained for more than 72 hours	Leads In date range
Met %	Total unique verified meetings/ Total leads retained for more than 72 hours	Leads In date range
Lead Mtgs	Total mtgs by Leads	Leads In date range
CP Mtgs	Total CP Mtgs	Leads In date range
Avg Mtgs	Total Meetings(SV/F2F) including follow ups Per FOS per day	Meeting in Date range
Total	New Marketing Leads	Includes all leads
Talked 1	Lead Touched within 1 Working hours of Assignment	Includes all leads
UnTouch 24	Lead not Touched till 24 Working hours of Assignment	Includes all leads
R wo Call	Retuning lead withoutcalling or returning lead without listening complete script, Try atleast thrice to avoid this	Includes all leads
Avg FTTR	FTTRMin (First Time To Response) / Total number of call attempts	Includes all leads

LEADS DASHBBOARD

Leads Dashboard

Clifard Rancy Pinto | 07 Jun 2019 To 01 Jul 2019

TTR	UTK3 ReAsn	Invalid R	Mkt/FOS	ReAsn/FOS	WikIn/FOS	Self/FOS	CP/FOS	Mkt	ReAsn	WikIn	Self	CP	Mkt R	ReAsn R	WikIn R	Self R	CP R
6	1	0	23	18	0	4	0	23	18	0	4	0	63%	60%	0%	0%	0%

Abbreviation	Description	Includes
UTK1 ReAsn	Leads will be reassigned if UnTouched for 1 Working hours	Includes all leads
Invalid R	Invalid Number (returned with reason as invalid number)	Leads In date range
Mkt/FOS	MktLeads / FOS	Leads In date range
ReAsn/FOS	ReassignedLeads / FOS	Leads In date range
WikIn/FOS	WalkinLeads / FOS	Leads In date range
Self/FOS	SelfLeads / FOS	Leads In date range
CP/FOS	CPLeads / FOS	Leads In date range
Mkt	MktLeads	Leads In date range
ReAsn	ReassignedLeads	Leads In date range
WikIn	WalkinLeads	Leads In date range
Self	SelfLeads	Leads In date range
CP	CPLeads	Leads In date range
Mkt R	MktReturned / MktLeads	Leads In date range
ReAsn R	ReassignedReturned / ReassignedLeads	Leads In date range
WikIn R	WalkinReturned / WalkinLeads	Leads In date range
Self R	SelfReturned / SelfLeads	Leads In date range
CP R	CPReturned / CPLeads	Leads In date range

Lead Dashboard

Leads Dashboard

LEADS DASHBOARD

Leads Dashboard

Clifard Rancy Pinto | 07 Jun 2019 To 01 Jul 2019

R	WkIn R	Self R	CP R	R	Mkt Win	ReAsn Win	WkIn Win	Self Win	CP Win	Win	NI	Avg CP Mtgs	CP Unq F2I	Employee	Start Date	End Date
0%	0%	0%	59%	0.0%	0.0%	0.0%	50.0%	0.0%	4.4%	53%	0.00	0	Clifard Rancy Pinto (Bangalore - B)	07 Jun 19	01 Jul 19	

R	Returned / TotalLeads	Leads In date range
Mkt Win	Win On Mkt Leads / MktLeads	Leads In date range
ReAsn Win	Win On Reassigned Leads / ReassignedLeads	Leads In date range
WkIn Win	Win On WalkIn Leads / WalkinLeads	Leads In date range
Self Win	Win On Self Leads / SelfLeads	Leads In date range
CP Win	Win On CP Leads / CPLeads	Leads In date range
Win	Total Win / TotalLeads - Returned	Leads In date range
NI	Not Interested / TotalLeads - Returned	Leads In date range
Calls	Calls / FOS (Leads Call + Cold Call)	Includes all leads
Avg CP Mtgs	Average Mtgs Channel Partner	
CP Uniq F2F	Unique F2F / Fresh Meetings Channel Partner	
Unq F2F	Unique F2F / Fresh Meetings	Includes all leads
Employee	EmployeeName	
Start Date	Greatest amongst DateOfJoining and FromDate	
End Date	ToDate	

**DEPICTS EMPLOYEE'S SALES PERFORMANCE
(DEALS/GROSS REVENUE/SMX)**

SALES DASHBOARD

Square Beats | More Apps | Latest Beats App | Incentive Slabs | Square HR | Training | Help Desk | My Profile | My Team | Apoorva Purohit

Sales Dashboard

Employee Search ...

Employee Name: Chaman Chawla

Date Range: 07 Jun 2019 To 30 Jun 2019

Employee	Team	FOS	Deals	Mkt Deals	D/FOS	Act %	Target	% Achd	SM	GR	Disc
Chaman Chawla (Bangalore - B)	5	5	0	0	0.00	0.0%	6.90 L	0.0%	0.0	L	0 0%
Chaman Chawla (Bangalore - B)	1	1	0	0	0.00	0.0%	2.67 L	0.0%	0.0	L	0 0%
NIVEDITHA S B (Bangalore - B)	1	1	0	0	0.00	0.0%	0.06 L	0.0%	0.0	L	0 0%
Rashmi N S (Bangalore - B)	1	1	0	0	0.00	0.0%	2.16 L	0.0%	0.0	L	0 0%
Sunil Kumar (Bangalore - B)	1	1	0	0	0.00	0.0%	2.47 L	0.0%	0.0	L	0 0%
Vineeth A (Bangalore - B)	1	1	0	0	0.00	0.0%	0.06 L	0.0%	0.0	L	0 0%
Annapurna Premanand Naik (B)	0	0	0	0	0.00	0.0%	0.32 L	0.0%	0.00	L	0 0%

MTD
QTD
YTD
Rolling Quarter
Last Month
Last Quarter
Last Year

MTD – Month Till Date
QTD – Quarter Till Date
YTD – Year Till Date
Rolling Quarter – Last Three Months

Pink Box shows exit employee

Click here to fetch details

SALES DASHBOARD

More Apps ▾ Latest Beats App ▾ Incentive Slabs Square HR Training ▾ Help Desk My Profile My Team Apoorva Purohit ▾

Sales Dashboard 🏠 Reports > Sales Dashboard

Chaman Chawla
 07 Jun 2019
To
30 Jun 2019

Employee	Team	FOS	Deals	Mkt Deals	D/FOS	Act %	Target	% Achd	SM (X)	Eff-SM (X)	GTV	GR	Disc	NR	NR+MS+PS
+ Chaman Chawla (Bangalore - B)	5	5	0	0	0.00	0.0%	6.90 L	0.0%	0.00	1.13	0.00 L	0	0%	0	0

Headers	Description	Remarks
Deals	Total No. of Deals	
Mkt Deals	Total no of deals out of marketing leads	
D/FOS	Deal per FOS	
Act %	Activations %age	Atleast one deal per FOS in a single month to get active
Target	PnL/T3/T2 - 4X , T1-5X, T0-6X	
% Achd	NR/Target*100	
SM(X)	Total Revenue / Gross Salary	
Eff - SM(X)	Eff - NR/Gross Salay	
GTV	Gross Transaction Value	
GR	Gross Revenue	
Disc	Discount %age	
NR	Net Revenue	
NR + MS + PS	Net Revenue + Management Share + PnL Share	

Click on PLUS icon for team's Performance.

SALES DASHBOARD

Sales Dashboard Reports > Sales Dashboard

Chaman Chawla | 07 Jun 2019 | To 30 Jun 2019

R+MS+PS	Eff-NR	Movement	Act NR	Psv NR	CR In-Range	CR	P-SOS	Total CPs	New CPs	Act CPs	CP/FOS	CP Deals	CP Deals %	Comm %	Empl
0	155,402	155,402	0	0	-100%	0%	0%	214	1	0.0%	0	0	0.0%	0%	Chaman Chawla (f

Eff - NR	Effective Net Revenue Removing all NC business	
Act - NR	Active NR Direct Business	
Psv NR	Passive NR Business By the Agents Indirect business CP business	
CR In-Range	Cancelled Revenue in Range	Raised in prev months and cancelled in current month
CR	Cancelled Revenue - Current month	Raised in current month and cancelled in same month
P-SOS	Pendency SOS	
Total CPs	Total CPs	Irrespective of Range
New CPs	Date range	
Act CPs	Active CPs - Basis on individual business by them	
CP/FOS	Channel Partner per FOS	
CP Deals	Channel Partner deals	
CP Deals %	Channel Partner closure deals out of total deals closed	
Comm %	Commission % - Sub broker Amount	

View 1 - 1 of 1

**INTERACTION(CALLS,F2F,SV) DETAILS
DONE BY FOS WITH CLIENTS**

MY TEAM INTERACTION

My Team Interaction Sales > My Team Interaction

Date: 10 Jun 2019 To 10 Jun 2019 Employee Name/Code: Clifard Rancy Pinto Employee Location: Select Filter Export to Excel

Show 10 entries Search:

#	Employee Name	Employee Code	T2/T3 Name	Lvl	P&L Head	Location	Leads					Interaction										Planned	Missed 3 Months			
							Total	Hot	Warm	Cold	New	Unmet	Calls (P)	Calls (A)	Calls (PA)	F2F (P)	F2F (A)	F2F (PA)	SV (P)	SV (A)	SV (PA)			UNQ-M	1 UTlk	
1	Clifard Rancy Pinto	SQY2598	Madhukar S Babu (SQY2491)	T0	Rajat Likhyan	Bangalore	101	10	13	53	0	45	2	2	0	0	0	0	0	0	0	0	0	0	67	20

Showing 1 to 1 of 1 entries Previous Next

FOS Information

Total – Active Leads in FOS Account
 New/Cold/Warm/Hot – Lead Stages
 Unmet – Leads without meeting

(P) - Planned/Pending
 (A) - Achieved
 (PA) - Planned Achieved
 UNQ - M Unique Meeting
 1 Utlk – Untalked 1
 Planned – Total planned interaction
 Missed 3 Months – Total Missed Interactions

**ALL THE CALLING DETAILS DONE
BY FOS THROUGH BEATS APP**

CALLING DASHBOARD

Calling Dashboard

Date: 08 Jun 2019 To: 08 Jun 2019 Employee Name/Code: Clifard Rancy Pinto Employee Location: Select Filter Export to Excel

Show 10 entries Search:

#	Employee Name	Employee Code	T2/T3 Name	Lvl	P&L Head	Location	Total Connected	Cold Total		Cold Unique		Leads Call			Unique Meetings
								Calls	Connected	Calls	Connected	Calls	Connected	Unique Connected	
1	Clifard Rancy Pinto	SQY2598	Madhukar S Babu (SQY2491)	T0	Rajat Likhyan	Bangalore	24	9	6	4	3	31	18	14	1

FOS Information

Total Connected Calls Leads + Cold Calls

Total Calls done by cold call dial pad. Cold Unique – Fresh Calls

Total leads call done. Unique Connected – Fresh lead calls

Fresh Meetings/Meeting the client for the first time

eLuminate

■ square
yards

**THANK YOU FOR PAYING ATTENTION
GET READY FOR AN ASSESSMENT**