



# RemoteNet Web Based CRM Salesman Management Dashboard



# Sales Management Dashboard



The RemoteNet Sales Management Dashboard gives your sales management team the tools to effectively update and monitor their sales team in real-time. It also allows sales team members to easily and visually see how they are performing and what they need to accomplish to achieve sales goals.



# Sales Management Dashboard Overview



## Update and View Sales Plans

- Create customizable and easily updated forecasts and sales plans for each rep they manage

## Drill into Sales Performance by Period and Salesman

- Check performance to plan and view detailed sales information

## Drill into Sales Funnel and Prospect Positions

- View Funnel positions and movement of prospects along the sales funnel

## Check Historical Sales vs Current Performance

- Drill into current and prior periods to see what sales trends are showing.

## Drill into Activity and Action Items

- Check on Activity and Action Codes verify activity by Month/Day/Year.



# Sales Plan Update

- ◇ This Year Vs Next Year Forecasts
- ◇ Individual Salesman or Teams
- ◇ Open Multiple Tabs
- ◇ Or Use Single View



Sales Management Dashboard

Choose a Tab Below to view details. For charts click a data point on the chart to drill down, or click a label to suppress/hide data on your chart.

Management of the following salesman: 001,003,999

Sales Management Dashboard | Sales Plan | Sales Funnel | Sales History | Sales Activity

Sales Management (CRM) Dashboard

Select a salesman to edit sales plan:

001 Fred Amisons

Month	Sales Plan This Year	Sales Plan Next Year
January	10000...	100000...
February	10000...	100000...
March	10000...	100000...
April	10000...	100000...
May	10000...	100000...
June	10000...	100000...
July	10000...	100000...
August	10000...	100000...
September	15000...	100000...
October	10000...	100000...
November	10000...	100000...

# Sales Plan Drill Down

- ◆ Monthly / Quarterly / Annual
- ◆ Individual Salesman or Overall
- ◆ Drill down to customer
- ◆ Drill down to product

management of the referring business: 000,000,000

Sales Management Dashboard | **Sales Plan** | Sales Funnel | Sales History | Sales Activity

### Sales Plan for period: 01/2014

Select a salesman:  
All

Select a period:  
YR/2014

SalesmanName	Sales Plan	Actual	Pct of Plan
001 - Fred Armissions	1,250,000.00	1,485,184.37	118.81
003 - Scott Smith	0.00	0.00	0.00
999 - Sales Manager	0.00	0.00	0.00

001 - Fred Armissions - 1485184.37  
003 - Scott Smith - 0.00  
999 - Sales Manager - 0.00

Sales Plan

### Sales History - Invoice Details

Type	Invoice #	Invoice Date	Customer Code	Name	Product Code	Description	Qty Invoiced	Unit GP	GP Amount
INV	519287	01/13/2014	12350	Amelin Medical100149 Associ		INNOVATIVE NITRIDERM™ STERILE POWDER-FREE SURGICAL GLOVES	1	36.31	36.31
INV	519287	01/13/2014	12350	Amelin Medical101153 Associ		ENERGIZER INDUSTRIAL BATTERY - ALKALINE	1	3.11	3.11

# Sales Funnel/Positions

Sales Management x Universal Prospect x Payment Method In x Create New Prospe x 12347 CRM Detail x 12345 CRM Detail x 100659 CRM Detail x

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Sales Management Dashboard Sales Plan Sales Funnel Sales History Sales Activity

### Sales Funnel Status for Selected Salesman

Select a salesman:

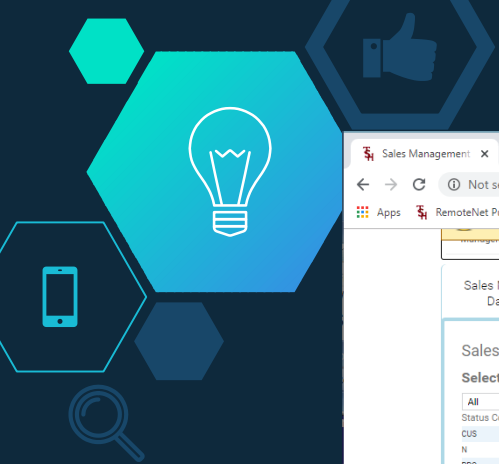
All

Status Code	Description	Counts
CUS	CUSTOMER	4
N	No Interest	1
PRO	PROSPECT	6

Legend: CUS - CUSTOMER (orange), N - No Interest (yellow), PRO - PROSPECT (purple)

### Prospects Matching Funnel Position

Customer Code	Name	Address 1	Address 2	City	State	Last Note Date
23678	Bridgehampton Medical	234 Maint Street		Bridgehampton	NY	01/15/2014
2346	Dr. Jeffrey Silverman	98 Montuk Hwy		West Hampton	NY	01/14/2014
2378	East Hampton Medical	456 Main Street		East Hampton	NY	01/15/2014
14814	MILPOND VET	12 MAIN STREET		Milford	PA	11/21/2018
23456	South Hampton Medical	101 Main Street		South Hampton	NY	01/14/2014
23098	Water Mill Medical	235 Main Street		WALTON	NY	11/20/2019



# Sales History

- ◆ Quarterly / Annual / 3 Year
- ◆ Individual Salesman or Overall
- ◆ Trend Lines and Optional GP\$
- ◆ Drill down to Customer / Product

The screenshot shows a web browser window displaying a 'Sales Management Dashboard'. The browser tabs include 'Sales Management', 'Universal Prospect', 'Payment Method In...', 'Create New Prospe...', '12347 CRM Detail', '12345 CRM Detail', and '100659 CRM Detail'. The address bar shows 'Not secure | hosting.tshinc.com/MDSWEB/login012'. The dashboard header includes navigation links: 'Place an Order', 'My Account', 'Deals', 'Contact Us', 'Home'. A search bar contains 'Enter Product Code'. The main content area is titled 'Sales Management Dashboard' and includes a sub-header 'Management of the following salesman: 001,003,999'. Below this are tabs for 'Sales Management Dashboard', 'Sales Plan', 'Sales Funnel', 'Sales History', and 'Sales Activity'. The 'Sales History' tab is active, showing 'Sales History for Selected Salesman and Period'. It features a 'Select a salesman:' dropdown set to 'All' and a 'Select a period:' dropdown set to '3 Years'. A data table and a combined bar and line chart are displayed. The chart shows Sales \$ (blue bars) and Gross Profit \$ (green bars) for 2012, 2013, and 2014. The 2014 data points are significantly higher than the previous years. Below the chart is a 'Sales History - Invoice Details' table with columns for Type, Invoice #, Invoice Date, Customer Code, Name, Product Code, Description, Qty Invoiced, Unit Price, and Invoice Amount.

Period	Sales \$	Gross Profit \$	Gross Profit %
2012	0.00	0.00	0.00
2013	0.00	0.00	0.00
2014	3,852,100.43	1,485,184.37	38.56

Type	Invoice #	Invoice Date	Customer Code	Name	Product Code	Description	Qty Invoiced	Unit Price	Invoice Amount
INV	519287	01/13/2014	12350	Amelin Medical Associ	100149	INNOVATIVE NITRIDERM™ STERILE POWDER-FREE SURGICAL GLOVES	1	121.029	121.03
INV	519287	01/13/2014	12350	Amelin Medical Associ	101153	ENERGIZER INDUSTRIAL BATTERY - ALKALINE	1	11.000	11.00



# Sales Activity

- ◇ Daily/ Monthly / Annual
- ◇ Individual Salesman or Overall
- ◇ Drill down to Prospect Note/Action

Sales Management Dashboard

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Management of the following salesman: 001,003,999

Sales Management Dashboard | Sales Plan | Sales Funnel | Sales History | **Sales Activity**

Sales Activity for Selected Salesman

Select a salesman:

Sales Action	Description	Daily	Monthly	Yearly	2.0
99	Follow up with call	1	1	1	1.8
CA	SEND CATALOG	2	2	2	1.6
LT	SEND LETTER	1	1	1	1.4

Legend: Daily (Yellow), Monthly (Green), Yearly (Blue)

Calls Matching Action Code

Customer Code	Name	City	State	Date Time	Contact Person	Notes	Completion Date
10059			AL	12/17/2019 08:32pm	david smith	Followup in 30 days	12/07/2019
12347	Bright Dentists	Briarcliff Manor	NJ	12/17/2019 07:41pm	Grace Heck	Call Back Followup in 60 days	12/27/2019



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001 - Fred Armissions - 1485184.37  
Sales Plan: 100  
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Sales History - Invoice Details

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# What's Next?

◇ Setup your Remotenet WebCRM Site Today

***Contact 1-973-777-8050***

***[Sales@tshinc.com](mailto:Sales@tshinc.com)***

