

Dashboard

Overview

The **Dashboard** gives you a real-time overview of your sales team's performance and lead activity for the current day and month.

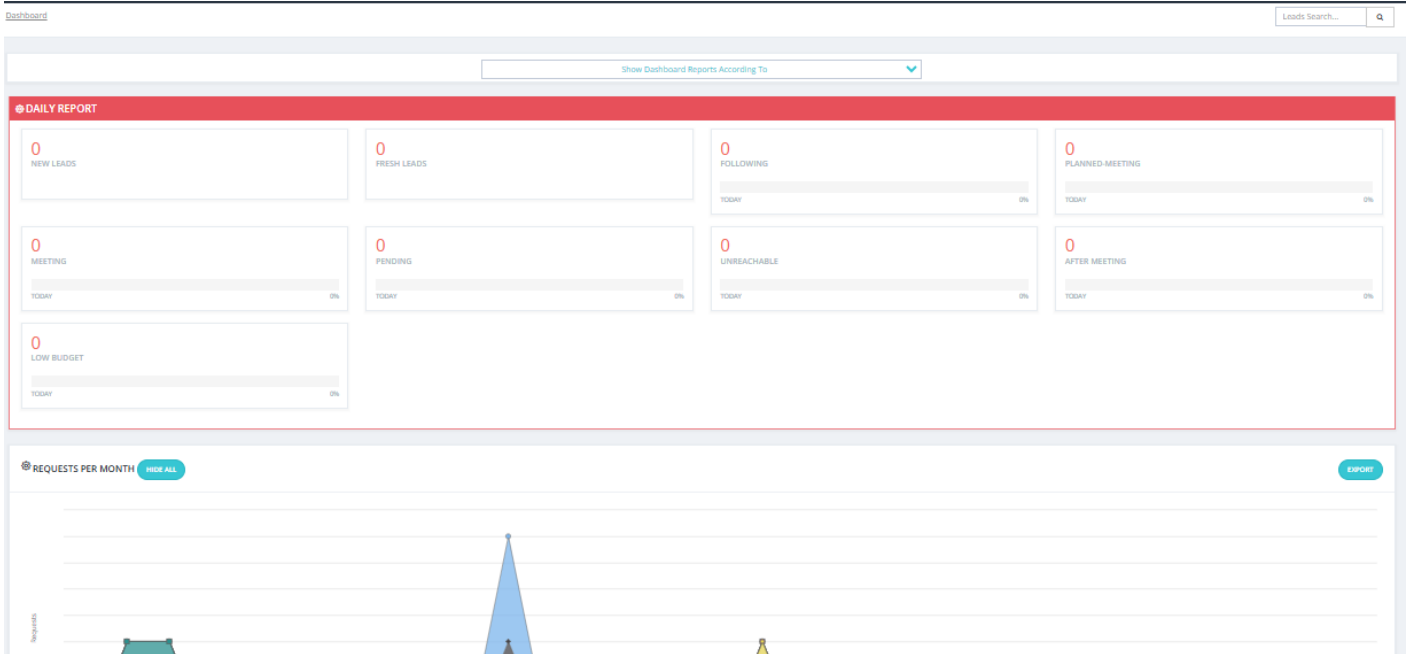
What You'll See on the Dashboard

Daily Report

Shows a summary of leads and their states for **today**. It displays how many leads are in each state and which ones require an action today.

- If you are a **manager/parent**, you can see leads for all users under you in the hierarchy tree.
- If you are a **regular user**, you will only see your own leads.

“☐ Only States that have a **Next Action Date** set will appear highlighted. States without a next action date will not show up in the daily view.



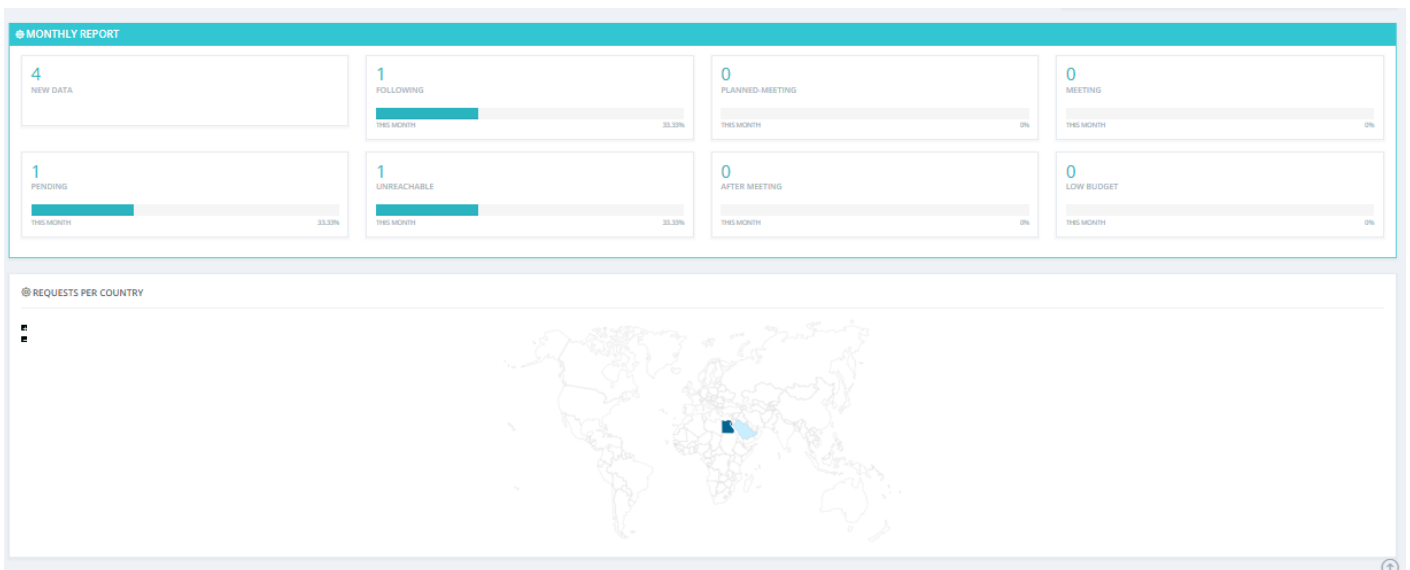
Monthly Report

Same as the daily report but calculated from **day 1 to day 30** of the current month.

- If you are a **manager/parent**, you can see leads for all users under you in the hierarchy tree.
- If you are a **regular user**, you will only see your own leads.

Request Per Country

Shows where your leads are coming from geographically — for example, Egypt, Kuwait, and so on.

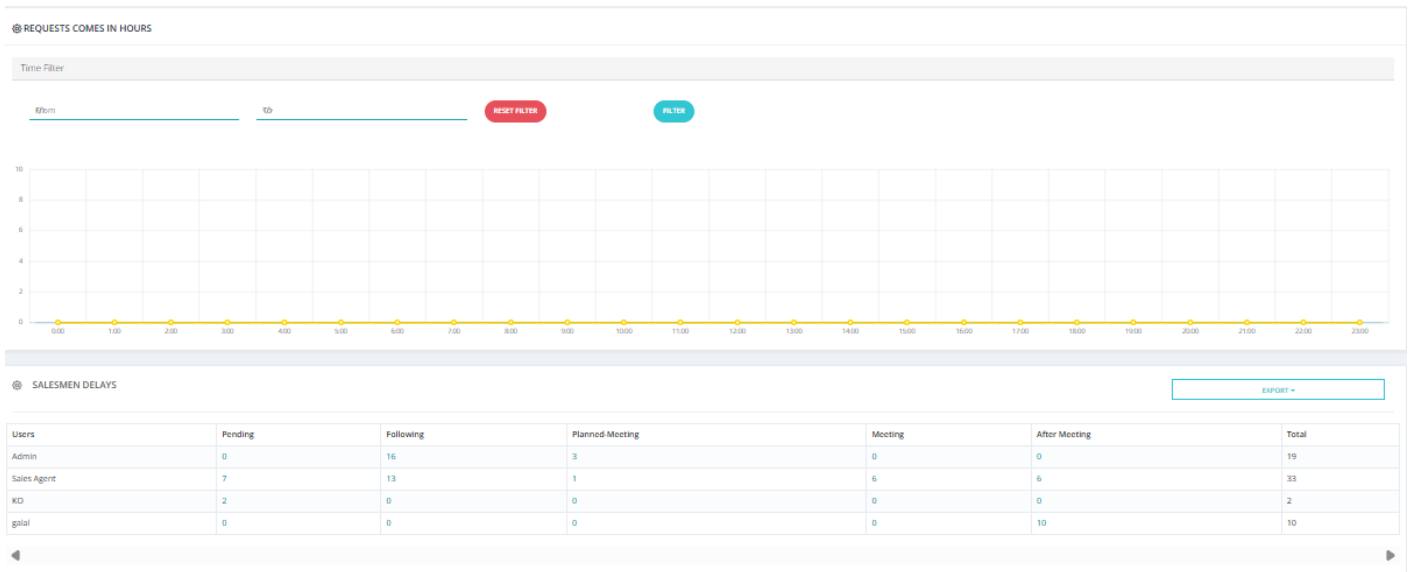


Delayed Leads Section

Displayed at the bottom of the dashboard. Shows which salesmen have delayed leads — leads that are overdue for action.

- If you are a **manager/parent**, you can see delays for all users under you in the hierarchy tree.
- If you are a **regular user**, you will only see your own delays.

You can click on any state in the dashboard to be taken directly to that filtered view automatically.



Key Things to Know

- The dashboard is **read-only** — you cannot take actions directly from here.
- Use it as a **daily check-in** to spot overdue leads and team performance at a glance.
- Clicking on a state card will redirect you to **My Leads** with an automatic filter applied.

Created 2026-06-24 11:34:16 UTC by Admin

Updated 2026-06-28 07:55:47 UTC by Admin