

Main page



Collects all dashboards into one overview with numbers from other dashboards.

Salg vs. budget this year

Uses the committed (sold) amount sold and compares to the sales budget as entered in the Excel sheet.

Salg vs. budget last year

Same numbers as above but using the sale date from same period last year.

Activities vs. budget this year

Counts the number of activities in the activities table and displays the activity budget from Excel as target.

Activities vs. budget last year

Same numbers as above but using the activity date from same period last year.

Active companies this year

Counts all active companies in the contact table at current.

Active companies last year

Counts all active companies that existed in the contact table last year.

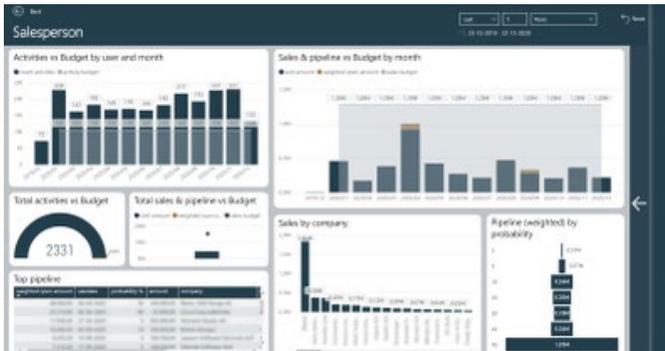
GDPR – Inactive persons

Counts the number of people in the person table and filters using last activity date **more** than 365 days.

GDPR – Active persons

Counts the number of people in the person table and filters using last activity date **less** than 365 days.

Salesperson



Intended for the seller. Provides an overview so you can see what agreements you have had with your contacts. Compares the activity budget (Excel file) with current activities from SuperOffice. The pipeline is also shown so you can see future invoicing.

The arrow on the right side of the dashboard can make the filters appear and you can filter per salesperson. A tooltip giving an in-depth explanation of the items involved in the calculation, is displayed if you hold the mouse over one of the graphs.

Activities vs. budget by user and month

Displays activities as bars by year and month and sets it up against the activity budget as a curve. If you click on the two arrows "Drilldown" the activities are displayed per. user.

Sales & pipeline vs. budget pr month

Amount sold is shown as a bar per. Year and month. Weighted open amount. Both figures are taken from the sales table where the sales budget is shown as a curve from the Excel sheet "sales budget". You can click on the two arrows "Drilldown" to get drilldown per. user. A tooltip is displayed if you hold the mouse over the graph to get an in-depth explanation of the items that are part of the calculation.

Total activities vs. budget

Appears as a speedometer and counts the number of activities in the agreement table and sets it up against the activity budget (Excel file).

Total sales pipeline vs. budget

is displayed as a curve chart and stacked bar chart with dots. Takes sales amount and weighted open amount from the sales table and compares to the sales budget (Excel file).

Top pipeline

Shows a table with the current pipeline sorted by highest (weighted) open amount.

Sales by company

Bar chart showing sales per company using the sales table.

Pipeline (weighted) by probability

Shows what is in the pipeline by probability calculated using weighted open amount.

Manager overview



Same numbers as for Salesperson but gives a manager overview and shows a total result of all activities against budget (Excel file).

The arrow on the right side of the dashboard can make the filters appear and you can filter per user and user group. A tooltip giving an in-depth explanation of the items involved in the calculation, is displayed if you hold the mouse over one of the graphs.

Activities vs. budget by user group, user, and month

Same numbers as for the salesperson dashboard but filtered by user group, user, and month.

Sales & pipeline vs. budget by user group, user, and month

Same numbers as for the salesperson dashboard but filtered by user group, user, and month.

Total sales, pipeline and weighted open amount is displayed as bars whereas the sales budget (from Excel) is shown as a curve.

Total activities vs. budget

Counts the activities in the activities table and sets it up against the activity budget from the Excel file and displays as a speedometer.

Total sales & pipeline vs. budget

Displays total amount of sales, open amount, lost amount and compares against the sales budget from the Excel file.

Activity type

Filter the number of activities by type using the appointment table.

Pipeline (weighted) by probability

Pipeline weighted open amount is shown as funnel chart by probability.

Contacts

id	company	large	address 1	address 2	address 3	zipcode	city	country	category
Acme-03345818-7ae7-4e23-8328-76284332333								Denmark	Konkurrent
Acme-04020210-2030-4820-8945-03648077347								Denmark	Konkurrent
Acme-04020210-8e20-4230-8d3e-714c406445c								Denmark	Konkurrent
07-09-2020 00:00:00	Advatica SCS (Slovak)							Denmark	Salvagepartner
21-12-2020 00:00:00	SuperOffice Denmark A/S	0	Delta Park 48, st			2805	Vesteråsvej Strand	Denmark	Salvagepartner
08-11-2020 00:00:00	Company No Persons		1122344					Storbritannien	Konkurrent
18-11-2020 07:40:33	Avnetek A/S (CSC Company)							Storbritannien	Konkurrent
15-12-2020 00:00:00	Acme-ae09624f-a5d1-4502-8e43-80470070751a3							Denmark	Konkurrent
21-12-2020 00:00:00	Acme-21a99262-7c7b-4540-85d1-8c8b159a1023							Denmark	Konkurrent
21-12-2020 00:00:00	Acme-2120276a-8a3e-826e-878e-07cc1680909a5c							Denmark	Konkurrent
21-12-2020 00:00:00	Acme-3ae07071-c079-460e-8c57-8b243842189							Denmark	Konkurrent
21-12-2020 00:00:00	Acme-4799819a-6a18-4870-8d0a-8d0776c71a71e1							Denmark	Konkurrent
21-12-2020 00:00:00	Acme-F5059846-2011-4b25-8a25-8a25848891a5							Denmark	Konkurrent

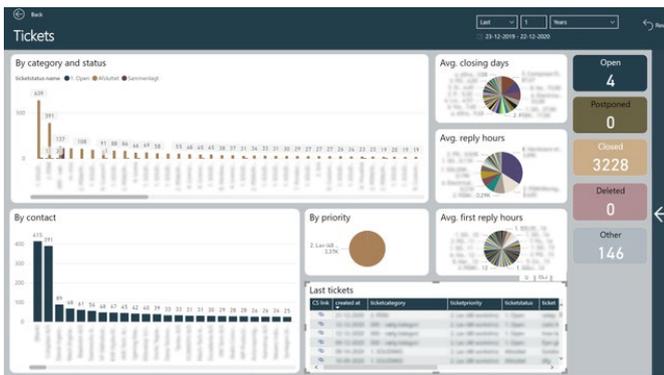
Shows all contacts within a given period, in order to find the customers that has not been active in a given period.

The arrow on the right side of the dashboard can make the filters appear and you can filter per contact category.

When contacts were last active

Shows a table of alle contacts within a given period, which is filtered using a slider with from and to date. The latest active date from the contact table is used.

Tickets (support)



This dashboard is intended for the support to provide an overview of all support cases in SuperOffice. Here, key figures are calculated as average closing time, average response time and average first response time. Drilldown is also used to see which tickets that are involved.

The arrow on the right side of the dashboard can make the filters appear and you can filter category priority and status. A tooltip giving an in-depth explanation of the items involved in the calculation, is displayed if you hold the mouse over one of the graphs.

By category and status

Displays the number of cases in the support by status and category. Filtered by date which can be selected in the upper right corner of the dashboard.

By contact

Bar chart with the number of cases which is calculated based on ticket number and filtered per contact company.

By priority

Appears as a pie chart with the number of cases by priority.

Avg closing days

Displays the average closing time in days by category. The numbers comes from the SuperOffice ticket table.

Avg reply hours

Pie chart showing the average response time in hours. The numbers comes from the SuperOffice ticket table.

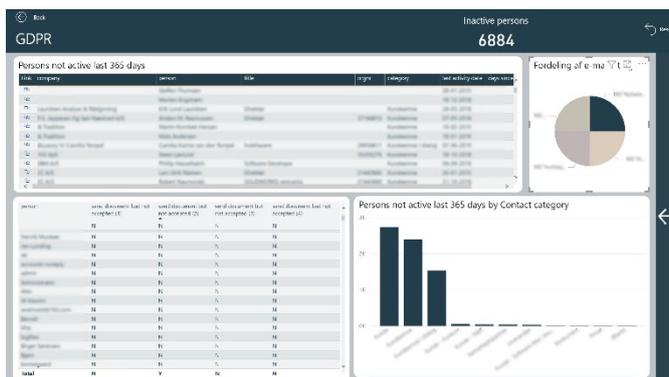
Avg first reply hours

Pie chart shows the average time to first contact in hours. The numbers comes from the SuperOffice ticket table.

Last tickets

Displays a table with latest tickets.

GDPR



Helps with checking up on GDPR compliance on customers without any activities within the last 365 days.

The arrow on the right side of the dashboard can make the filters appear and you can filter per contact category.

Persons not active last 365 days

Displays a table of contacts who have not had an activity in the last 365 days.

Distribution of e-marketing

Shows what kind of marketing channels the contact person has accepted. Taken from "shipment type" and "shipment type reservation".

Inactive persons

Displays the number of contacts that have not been active in the last 365 days.

Persons not active last 365 days by Contact category

Displays the number of contacts that have not been active in the last 365 days filtered by contact category.

Excel files

The Excel files must be uploaded to a web address such as Dropbox or OneDrive and are intended for manually loading a budget if you follow the structure of the Excel files. This way you can load your own budget as shown in the report.