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TECHNOLOGIES



DASHBOARD WIDGETS

Process for Client Management

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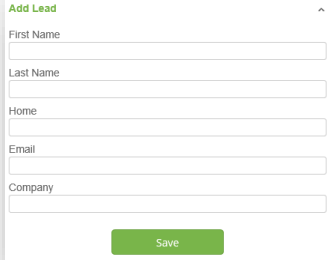
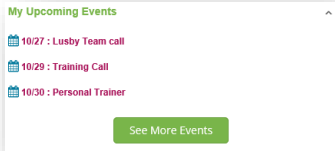
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DASHBOARD WIDGETS

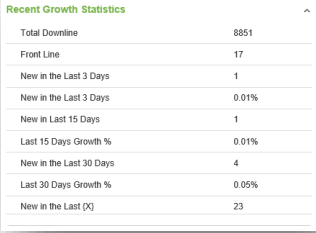
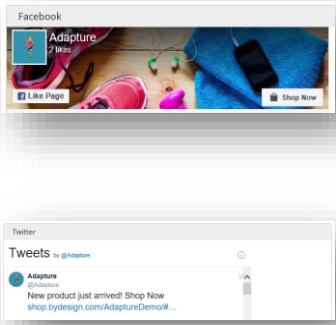

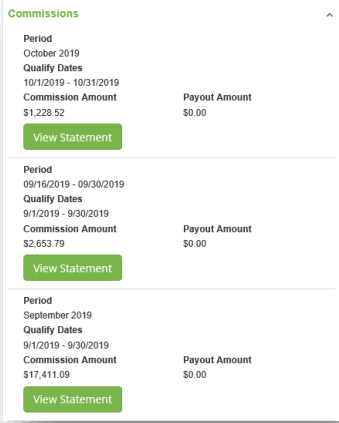
OVERVIEW

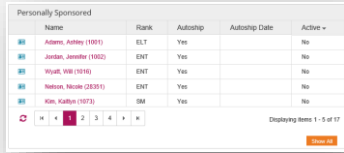
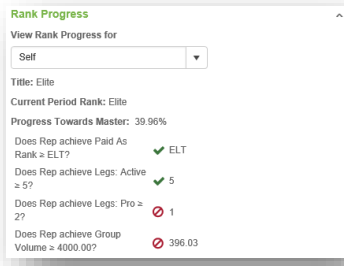
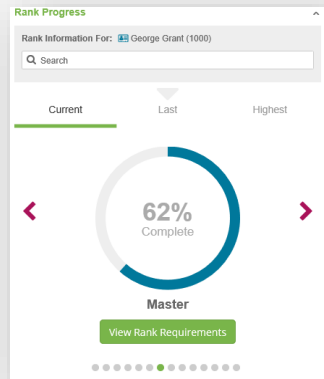
The home page of your Rep Back Office is a great resource of information at-a-glance, and the starting point for any action to be taken. It is important to maximize the impact of that home page through the use of various widgets available to you. The table below outlines the most commonly used widgets, along with descriptions of how each can be configured.

TYPES

Alert	Image	Use	Configuration Options
Welcome		Welcomes Rep by name; provides basic ID and rank info	Choose which rank types are displayed or hidden, based on relevance to your business model and compensation plan
Since your Last Visit		Notifies Rep of events that have occurred since the last login	Choose from available items to alert when new, including orders, recruits, leads, messages, etc
Add a New Lead		Quickly enter a new lead/prospect	Standard
Upcoming Events		Displays upcoming events from the Rep's calendar	Standard

<p>Alerts & Feeds</p>		<p>Displays the most recent 3 alerts for this Rep</p>	<p>Standard</p>
<p>Your Organization</p>		<p>Provides stats on team growth and performance</p>	<p>Standard</p>
<p>News</p>		<p>Displays most recent 3 items from NEWS area of Revolution (content management located at Admin>Tools>Extranet>News)</p>	<p>Standard</p>
<p>Free Text</p>		<p>HTML Images/Videos</p>	<p>Standard</p>

<p>Growth Statistics</p>		<p>Provides stats regarding team growth, with comparison percentages to prior periods</p>	<p>Standard</p>												
<p>Free Text with Title</p>		<p>HTML Social Feeds</p>	<p>Standard</p>												
<p>Last 3 Month Volumes</p>	 <table border="1"> <thead> <tr> <th>Period</th> <th>PV</th> <th>GV</th> </tr> </thead> <tbody> <tr> <td>Oct 1 2019 - Oct 31 2019</td> <td>92.48</td> <td>1,646.98</td> </tr> <tr> <td>Sep 1 2019 - Sep 30 2019</td> <td>26,297.80</td> <td>118,260.38</td> </tr> <tr> <td>Aug 1 2019 - Aug 31 2019</td> <td>6,558.32</td> <td>136,479.12</td> </tr> </tbody> </table>	Period	PV	GV	Oct 1 2019 - Oct 31 2019	92.48	1,646.98	Sep 1 2019 - Sep 30 2019	26,297.80	118,260.38	Aug 1 2019 - Aug 31 2019	6,558.32	136,479.12	<p>Displays personal and group volume for the 3 most recent bonus periods</p>	<p>Select which bonus agents to use: Genealogy, Period, Volume Type</p>
Period	PV	GV													
Oct 1 2019 - Oct 31 2019	92.48	1,646.98													
Sep 1 2019 - Sep 30 2019	26,297.80	118,260.38													
Aug 1 2019 - Aug 31 2019	6,558.32	136,479.12													
<p>Commissions</p>		<p>Displays commissions for the 5 most recent bonus periods, including the current.</p>	<p>Standard</p>												

<p>Personally Sponsored Grid</p>		<p>Provides listing of all personally sponsored Reps, with high level stats and link to details.</p>	<p>Choose number of Reps to display, as well as columns to include (Autoship, Active). Also choose to exclude inactives or not.</p>
<p>Dynamic Rank Qualification</p>		<p>Display of rank progress for Rep, with option to view for downline members. Total percent displayed along with details on each qualification criteria.</p>	<p>Select which bonus period to use, as well as which downline members to include in results. Display volume totals within widget, or not.</p>
<p>Rank Progress 2.0</p>		<p>Visual display of rank progress for Rep, with option to view for downline members. Total percent displayed for each rank not yet achieved, with detailed qualification criteria available from View Rank Requirements. Display of Last paid title with commission amount and Highest paid title with achievement dates.</p>	<p>Select which bonus period to use, as well as which downline members to include in results.</p>

CONFIGURATION

CONFIGURATION/SETUP

Multiple dashboards can be created, for various locales/countries/ranks/etc. For each dashboard created, there is a left and right side. Both will display on desktop view, but only the right side displays on mobile view (left side available via fly-out menu).

Standard configuration options include:

- Active – checkbox to indicate if a widget is active or not
- Wrap in Panel – wraps the widget into a branded color panel/header

- Output Order – determines sort order of widgets on page, within left and right sides. Widgets with equal sort orders within the same side will be sorted randomly
- Dates – allows for a widget to be displayed temporarily, or with an end date
- Rank – allows for a widget to be displayed only for Reps at/above/below a specific rank(s)
- Hide from Non-Pro – by checking this box, only PRO/UPGRADE users will have visibility to this widget
- Collapsed by Default – will the widget be expanded or collapsed at first entry to home page (yes for collapsed, no for expanded)

MANAGEMENT

TO CREATE A NEW DASHBOARD:

1. Log into FREEDOM back office
2. In the upper right menu, under DEPARTMENTS, choose ADMINISTRATION
3. Under REVOLUTION, choose DASHBOARD MANAGER
4. At top of page, click on NEW DASHBOARD
5. Fill out all necessary fields:
 - Description – name this dashboard
 - Rank – displays/hides based on Rep rank
 - Country – displays/hides based on Country
 - State – displays/hides based on State
 - Priority – If a Rep qualifies for multiple dashboards, determine which one takes priority and will be displayed
 - Default – Check to make this dashboard the default, to be displayed for those who do not yet fall into another dashboard (ie New Reps)

TO CREATE A NEW WIDGET:

1. Log into FREEDOM back office
2. In the upper right menu, under DEPARTMENTS, choose ADMINISTRATION
3. Under REVOLUTION, choose DASHBOARD MANAGER
4. Right click on either LEFT SIDE or RIGHT SIDE (based on where you'd like the widget to be located), then choose NEW WIDGET
5. Click on SAVE

TO EDIT AN EXISTING WIDGET:

1. Log into FREEDOM back office
2. In the upper right menu, under DEPARTMENTS, choose ADMINISTRATION
3. Under REVOLUTION, choose DASHBOARD MANAGER
4. Find the appropriate widget to be modified, and click on it.
5. Make any/all necessary changes
6. Click on SAVE

NOTE: If multiple dashboards have been created, a widget to be edited must be done in EACH dashboard, as all changes impact only that one instance of the widget (on the dashboard under which you clicked on the widget name).

RECOMMENDATIONS

WIDGET LOCATION

While, in theory, any widget can be placed on either side of the dashboard, there are some considerations to be taken when determining the location of each:

- The left side of the dashboard carries a narrower width than the right. Therefore, any widget which will be horizontal in nature (marketing images, personally sponsored grid, alerts, news) tend to display better on the right side.
- The right side of the dashboard is the one that is displayed by default when viewing in mobile. The left side is accessed via a fly-out menu.
- Upon logging in, EVERY Rep will see those widgets in the top spots on the dashboard, even if only briefly before navigating to other areas of Revolution. However, any widgets further down on the page will require scrolling, meaning that not EVERY Rep will see them.

MULTIPLE DASHBOARDS

While most clients only have a single dashboard for all Reps, some do choose to leverage the multiple dashboards for New vs Seasoned Reps and in various countries.

Keep in mind that each widget comes with hide/show options based on rank, and managing these at a widget-level can be much easier than managing at a dashboard-level.

MUST-HAVE WIDGETS

The top widgets (based on usage and feedback) are:

1. Rank Progress – this widget provides answers to the most common questions a Rep has when accessing his/her back office:
 - a. What is my current rank?
 - b. How close am I to the next rank?
 - c. What do I still need in order to achieve that next rank?
2. Marketing Image – from a corporate perspective, this widget provides a powerful and effective communication vehicle to all Reps engaging in the business. From a Rep perspective, an image breaks up the information on the page making it easier/more pleasant to view and take in.
3. Alerts – Reps will see right away what is going on in their business, with easy access to connect to customers and recruits. Plus, you can deliver personalized training, motivation and recognition right on their home page.