XPANZION
ULTIMATE BUSINESS DESIGNER

Enterprise Dashboard Training

16-Week Program

ENTERPRISE ACADEMY

So Your Business Can... Boldly Go Where No Business Has Gone Before!

- Intro to Sales Dashboard

1) Select Sales from Back Office
2) Select Sales Teams under Configuration from the left menu
3) Click on the Sales Team you want to manage
4) Name or re-name your sales team if required

Note: Some teams are linked to automated mailing lists – changing the sales team name will also change the list name

5) Select the Team Leader form the drop down menu
6) Click Add under Team Members to add additional team members
7) Click Save
8) Click Follow from the bottom right to Follow the Sales Team and get desktop notifications (within XpanZion) when leads come into the pipeline

View Sales Dashboard

8) Click Dashboard from the left menu
9) Click the Pipeline button for the Sales Team Campaign you want to view
10) Leads that come in through campaigns will show up here with affiliates listed as the Salesperson
11) To view leads in all stages of a campaign, clear the filter by clicking the x on the sort filter in the upper right; then enter your common campaign name used in your automated mailing lists and select Search Stage for: your campaign name
12) Click on the Lead you want to view

Note: You can use the Discussion channel at the bottom to send a quick email message

Consider your campaign sequence when creating automated mailing lists so your sales teams will sort in the correct order

A Sales Team is automatically created when you click the Create Automated Framework button while creating your automated mailing list

With a well thought out plan, automated campaigns can progress your leads through your sales process automatically

Follow your Sales Teams to get desktop notifications right in your XpanZion dashboard

Use filtering to search for your campaign and select Search Stage for: your campaign name to see the pipeline and leads in each stage for your campaigns