Clipper MAGAZINE

REPORTS & DASHBOARDS

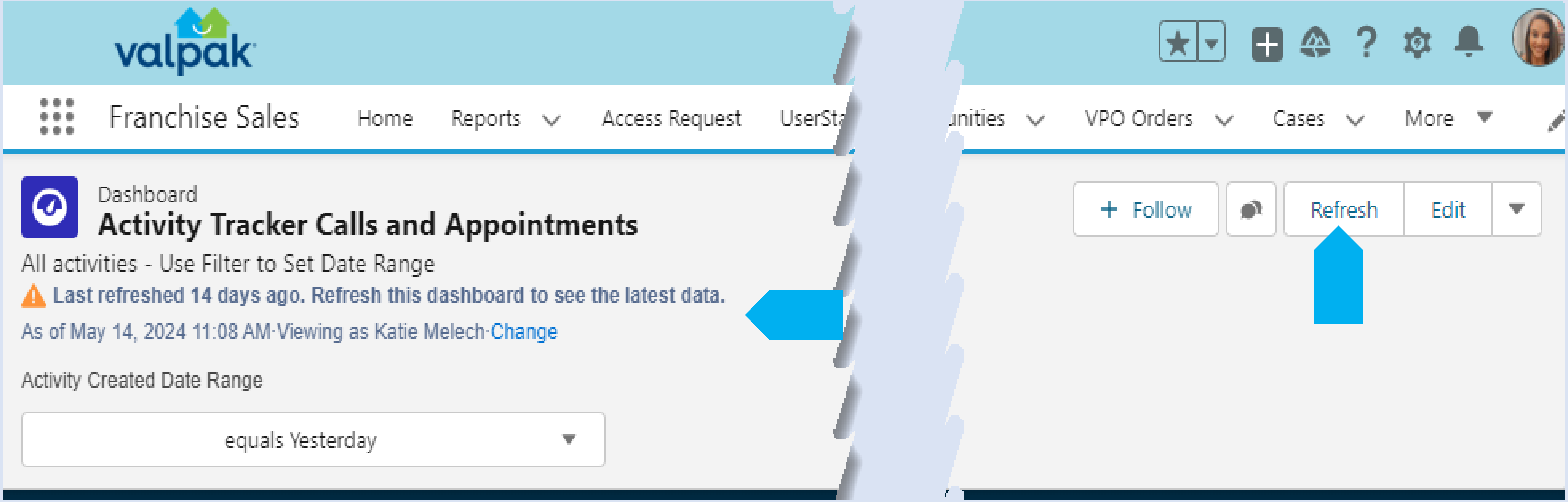
Orientation

AGENDA

1. DASHBOARD TIPS
2. ACTIVITY TRACKER
3. SALES LENS
4. CHARGENT REP DASHBOARD
5. COMMISSION DASHBOARD
8. CASES
9. CASE DASHBOARD

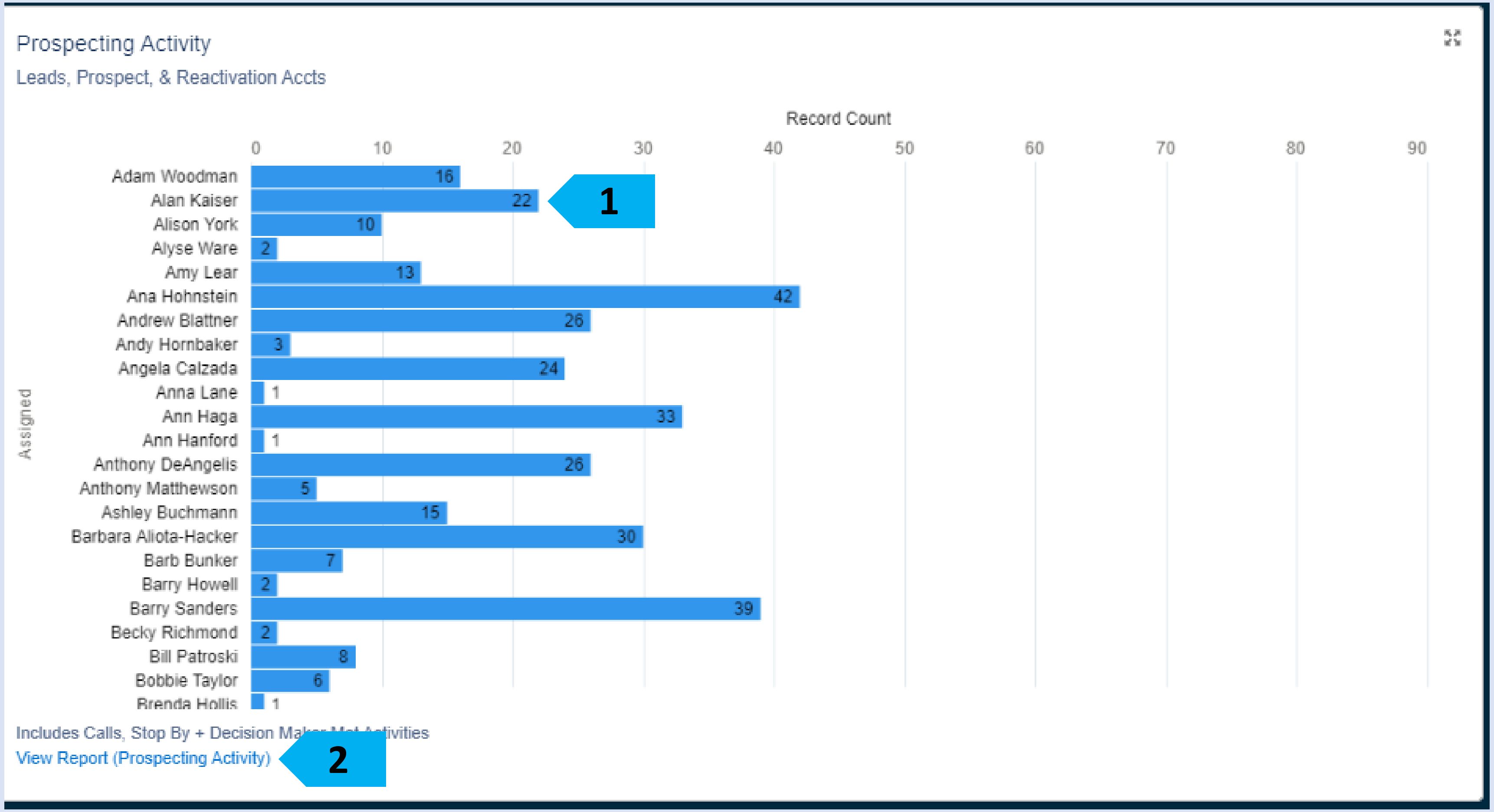
DASHBOARD TIPS

REFRESH

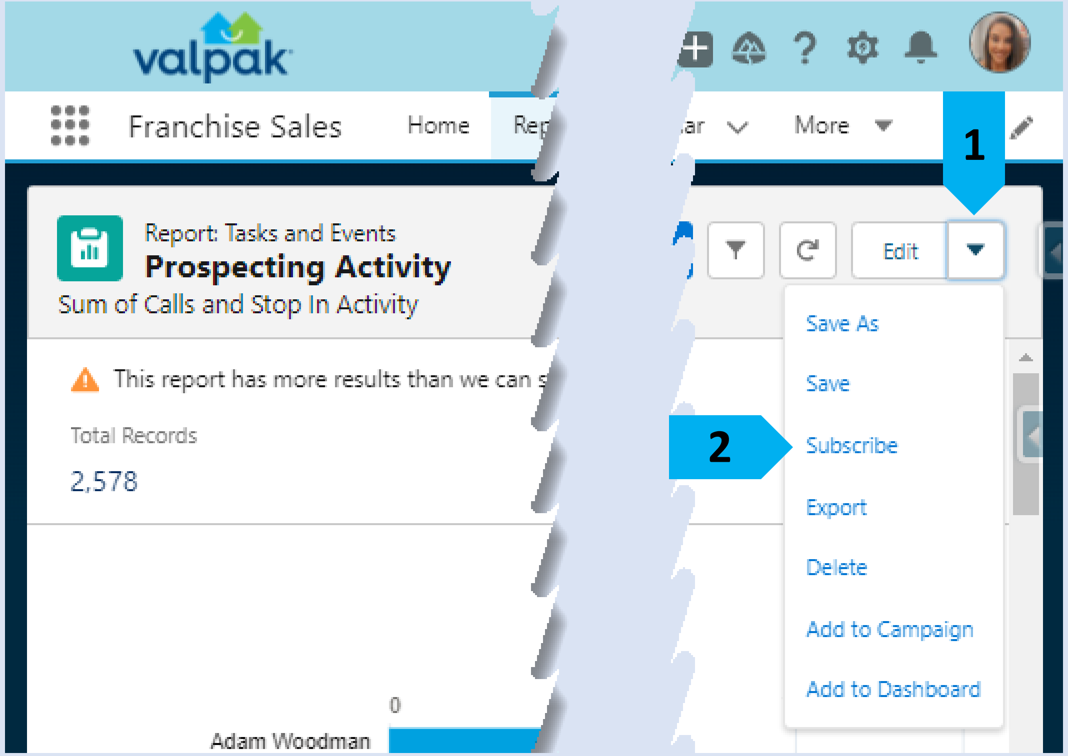


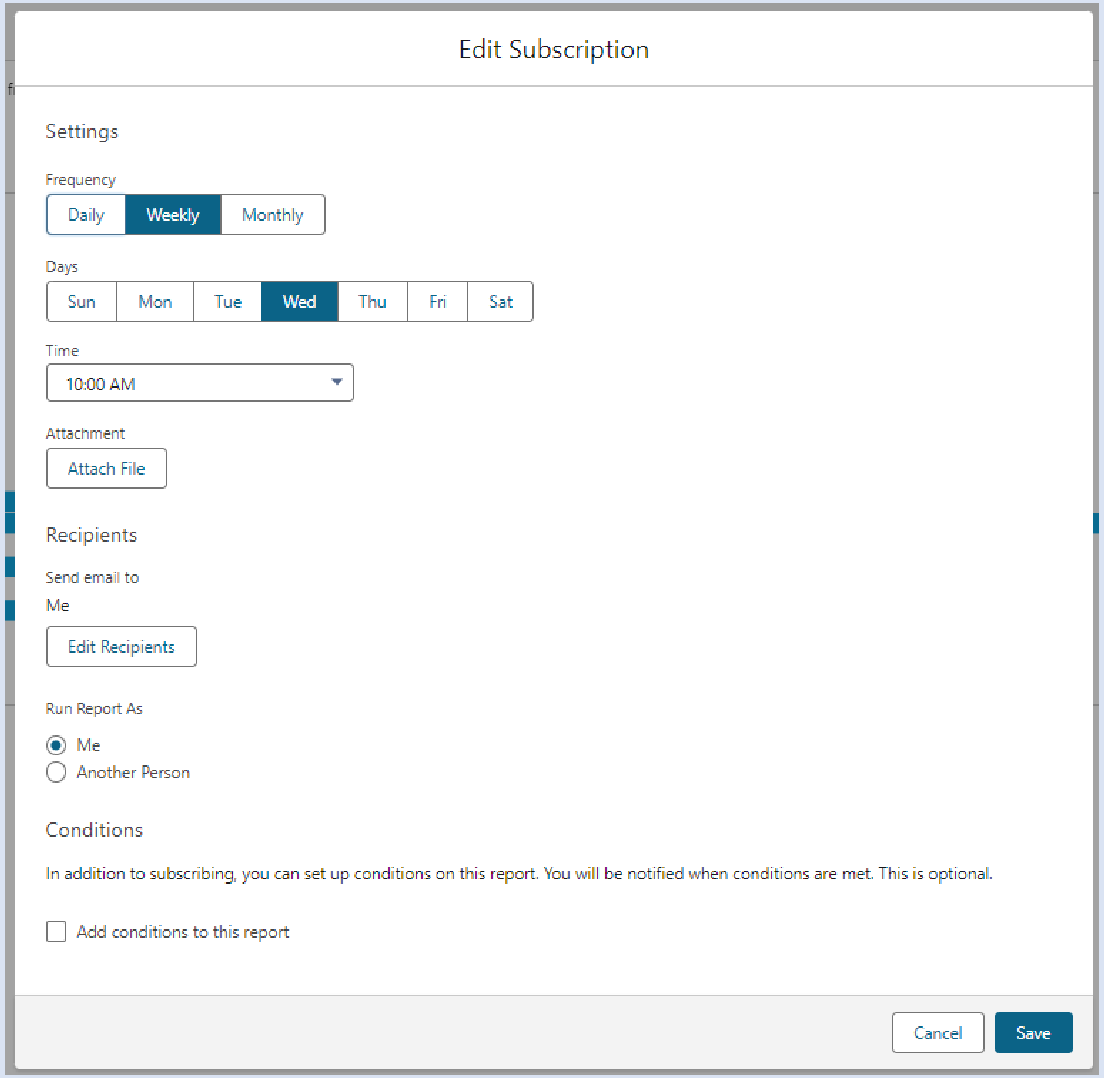
Always click Refresh when you open a Dashboard. You can see on the left-hand side when the last time data was pulled into the Dashboard.

REPORT LINKS



SUBSCRIBE

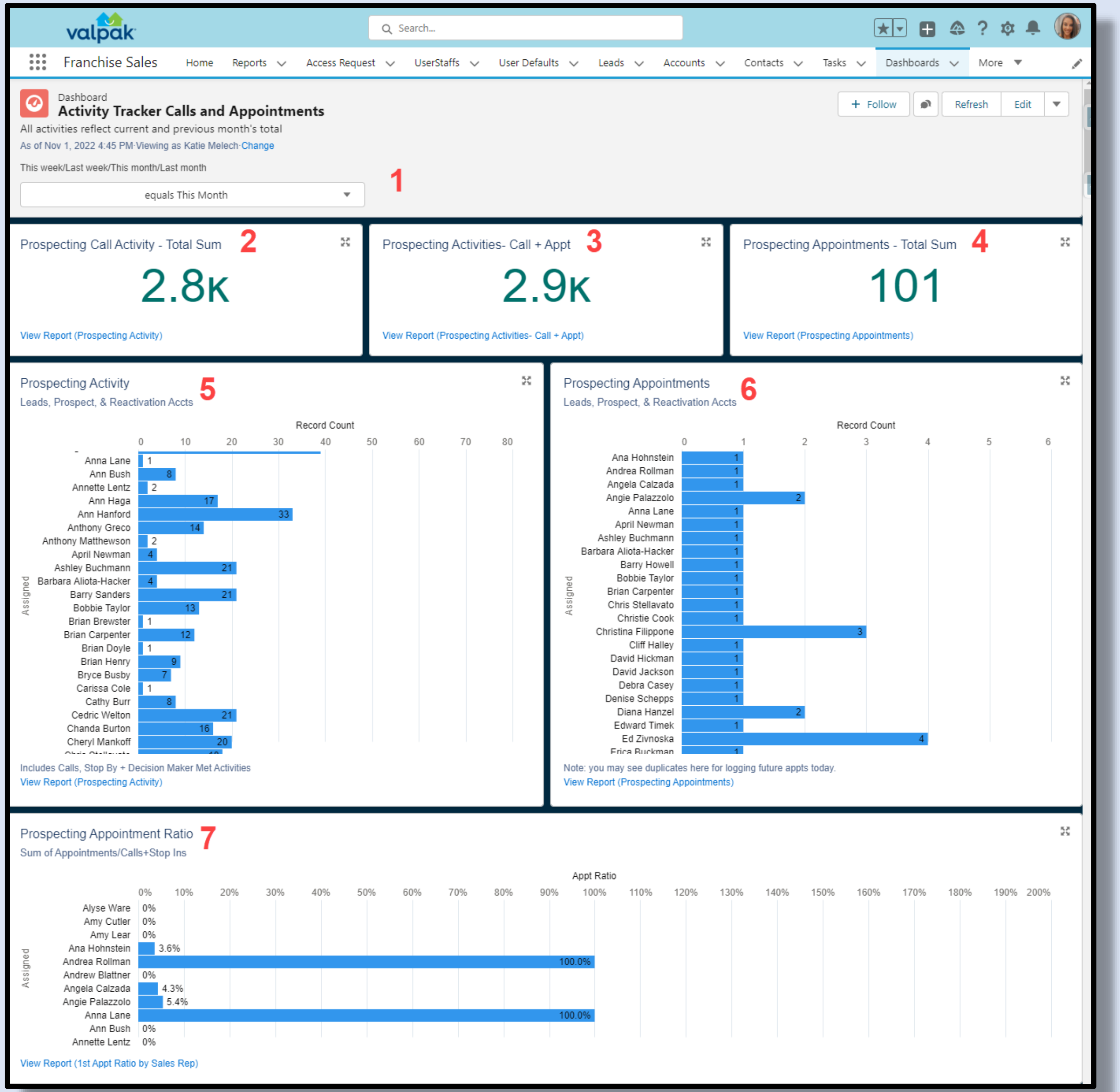




On the Report, click the drop down and select Subscribe. Choose you settings and click Save.

ACTIVITY TRACKER DASHBOARD

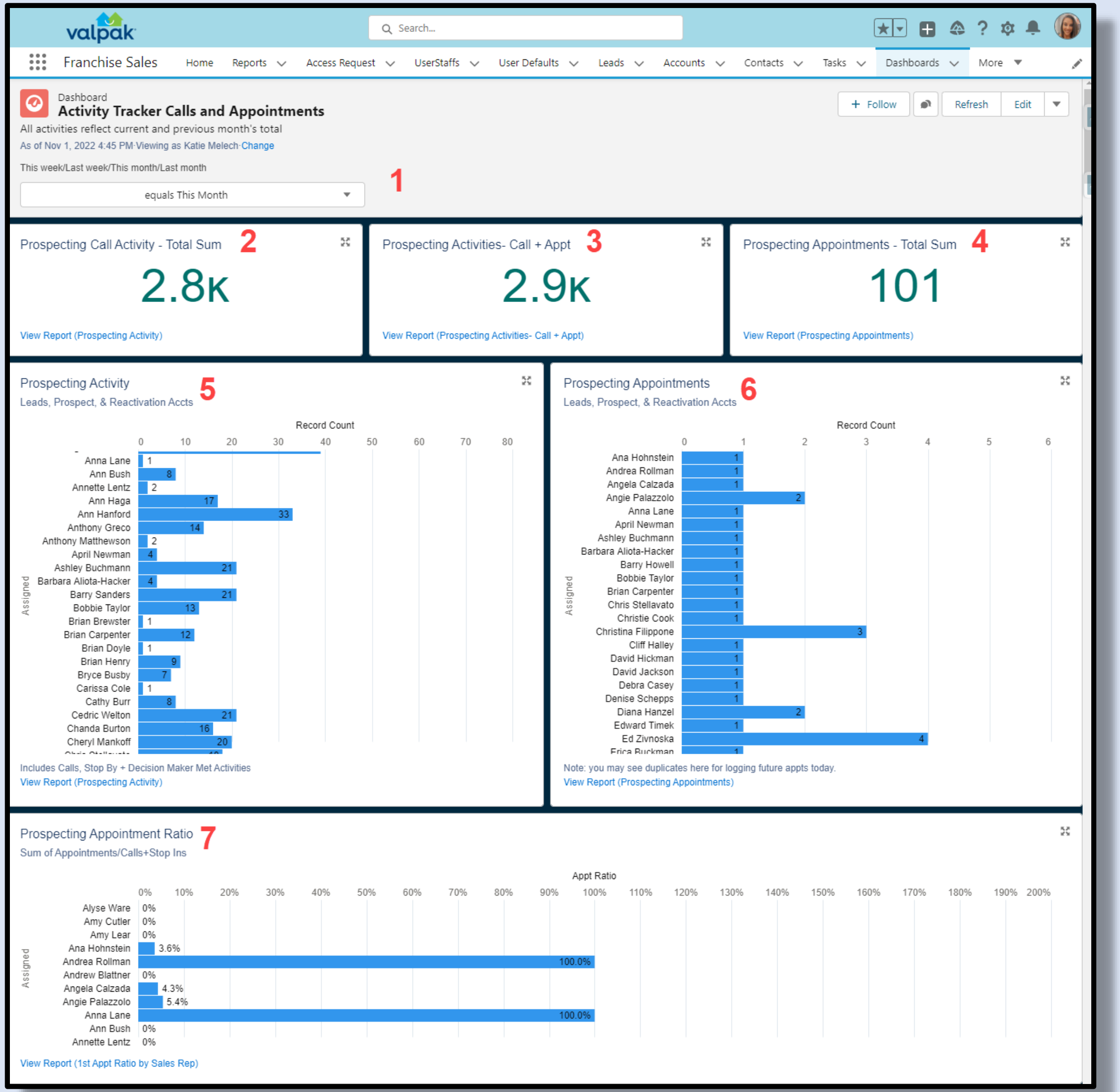
ACTIVITY TRACKER



Questions the dashboard helps answer:

- How many calls and appointment is my rep setting?
- What is their call to appointment conversion ratio so I can identify coaching opportunities?
- How many calls and appointments are being logged in my market?
- Are there any funded leads not getting attention?
- How many calls and appointments are with existing clients? Which clients are they meeting with so I can coach on upsell opportunities?

ACTIVITY TRACKER



Main Sections

Prospecting Activity

- Calls and Appointments at the Rep Level
- Calls and Appointments at the Market Level
- Prospecting Ratio
- Prospecting Emails Sent

Funded Leads

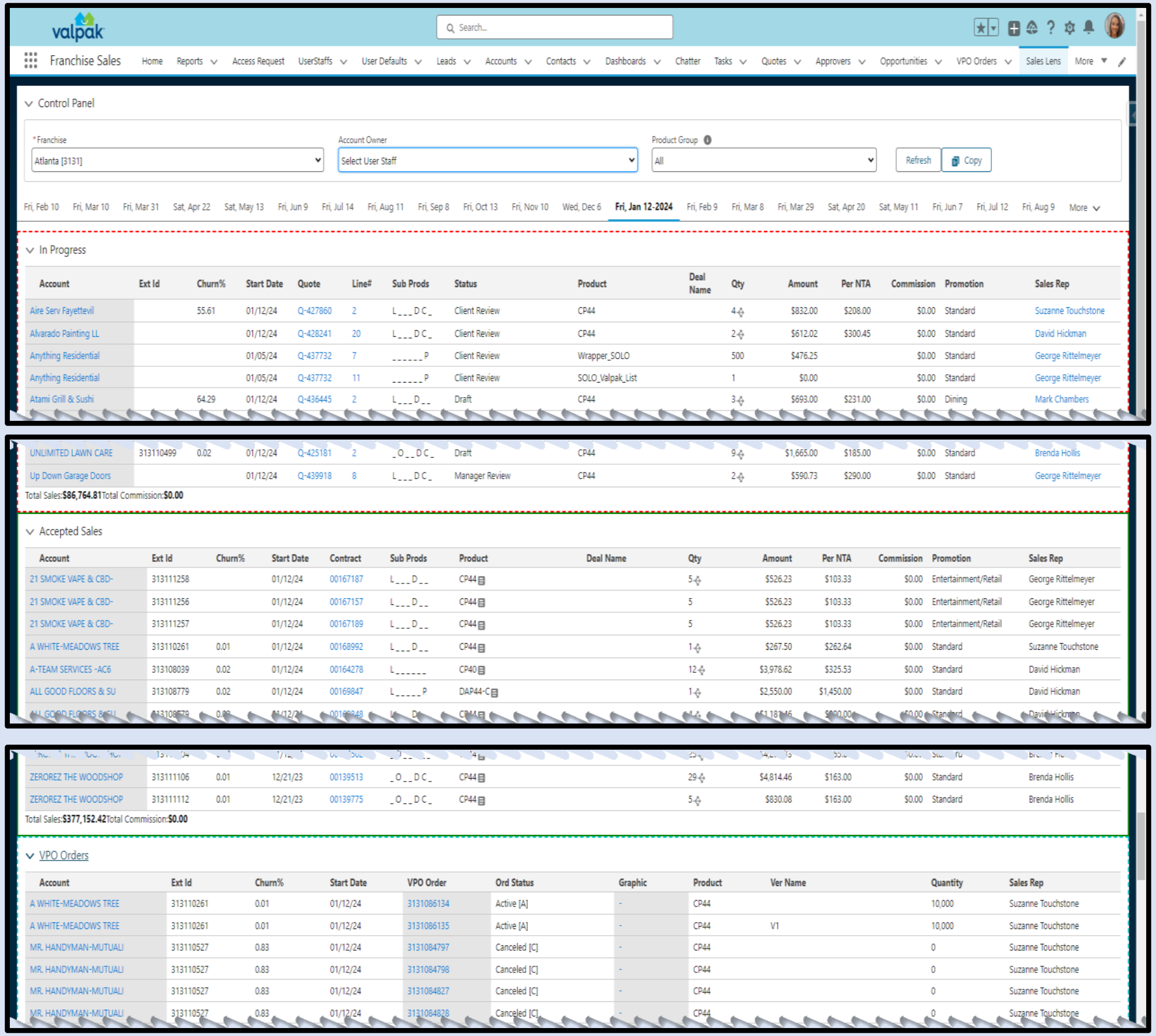
- Leads for Follow Up
- Prospect Accounts for Follow Up

Existing Clients

- Client Activity
- Client Calls and Appointments at the Rep Level
- Client Calls and Appointment at the Market Level

SALES LENS

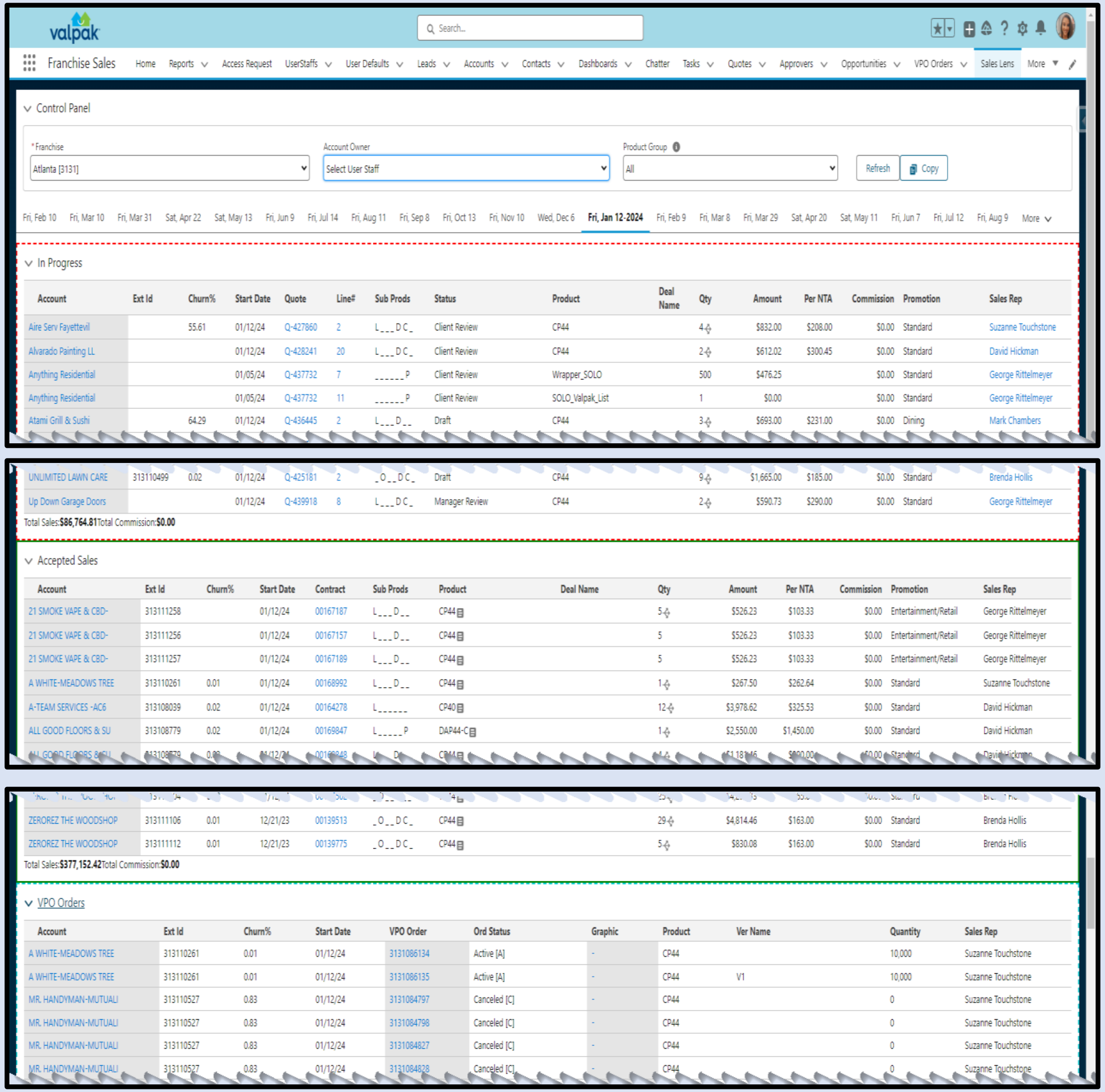
SALES LENS



Questions the dashboard helps answer:

- What is the status of a quote? What are the proposal details?
- What is already Closed Won for this mailing?
- What is the status of the creative?
- Are there any clients that we need to get renewed?
- Did someone mail last month or same mailing last year but not mailing this month?
- Which opportunities are closing soon but do not have a quote in progress?

SALES LENS



Main Sections – sort by Market, Rep, Product

In Progress

- Quotes in Draft, Out for Client Review, or Approved
- Details: start date, products, distribution, and rate

Accepted Sales

- Closed Won Quotes
- Details: start date, products, distribution, and rate

VPO Orders

- Order ID and Graphic Status

Renewable Contracts

- Contracts ending and not renewed

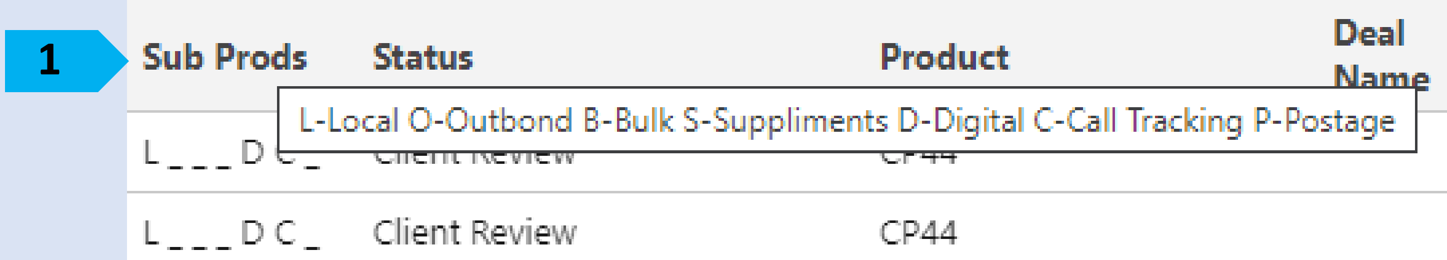
Potential Sales

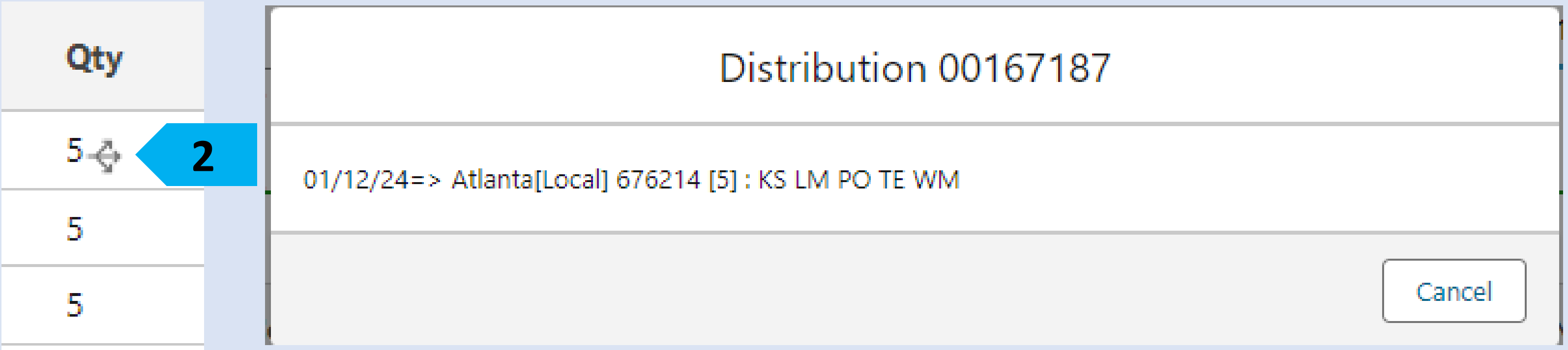
- Previous Month or SMLY with no sales in current month

Opportunity Pipeline

- Closing Soon with no associated quotes

SALES LENS GUIDE

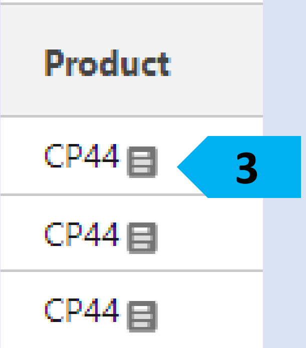


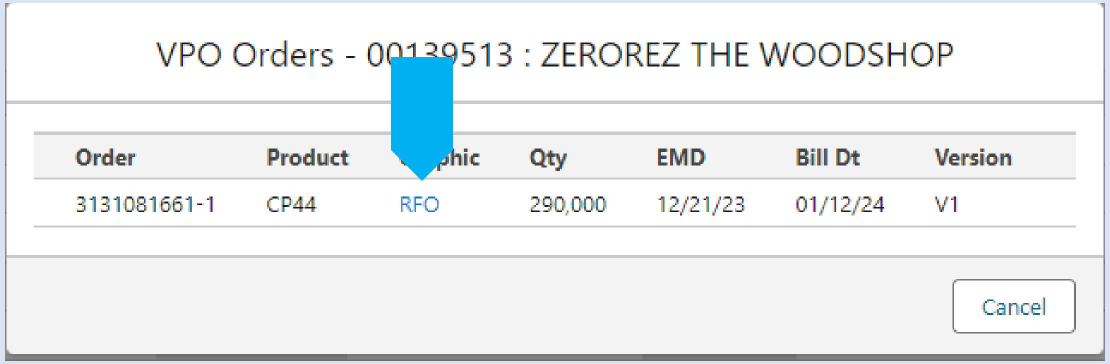


1.Hover over Sub Products to get a break down of what the letters stand for
2.Click the tri arrow icon to get quick access to the NTA's that are mailing that month

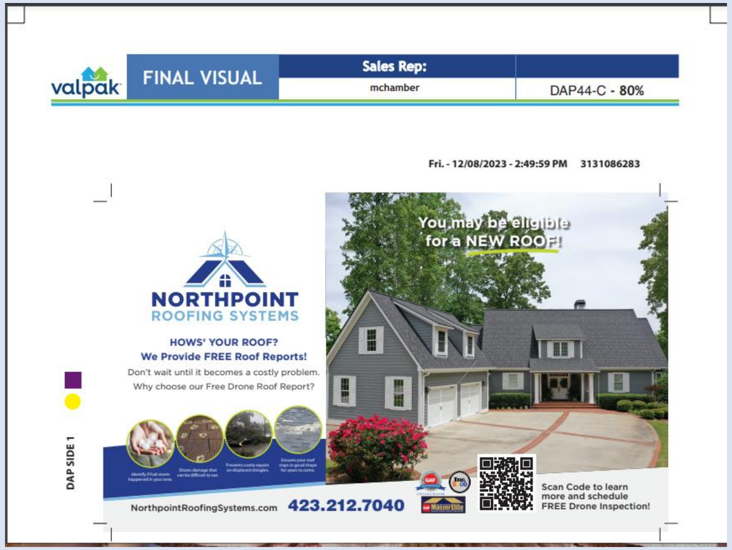
SALES LENS GUIDE CONT.

3. To view the Graphic, under Accepted Sales, click the 3 lines next to the Product and then click the graphic link.



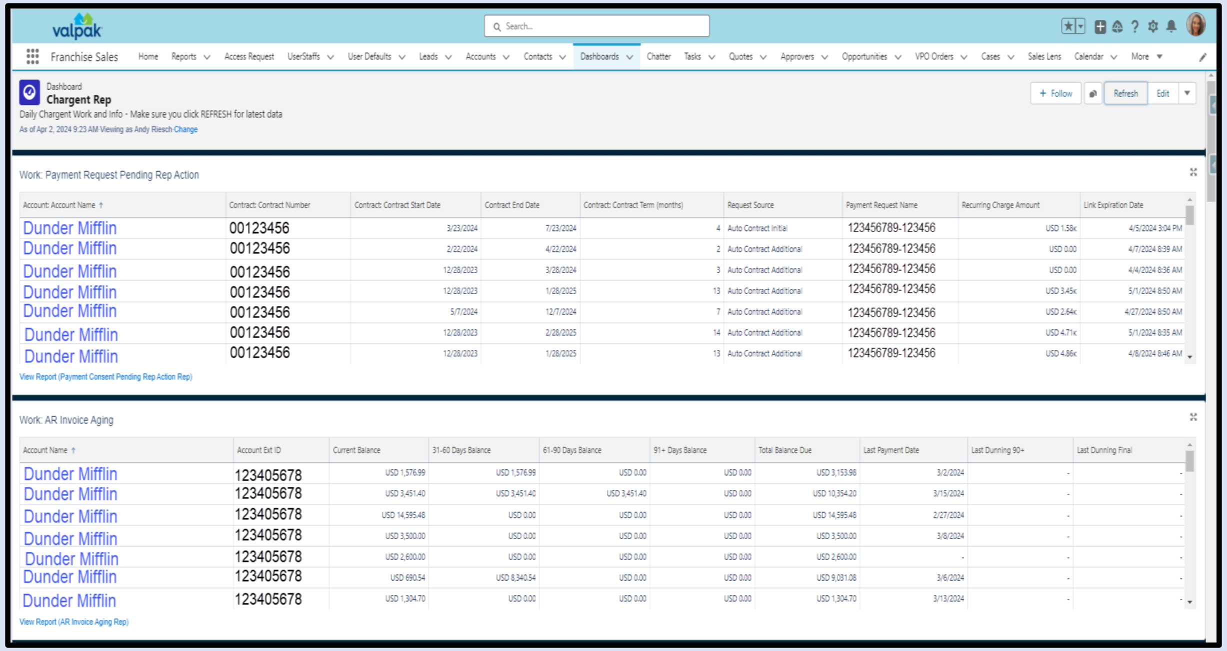


4. OR Under VPO Orders, click on RFO or PPO to open the graphic in a new tab.



CHARGENT REP DASHBOARD

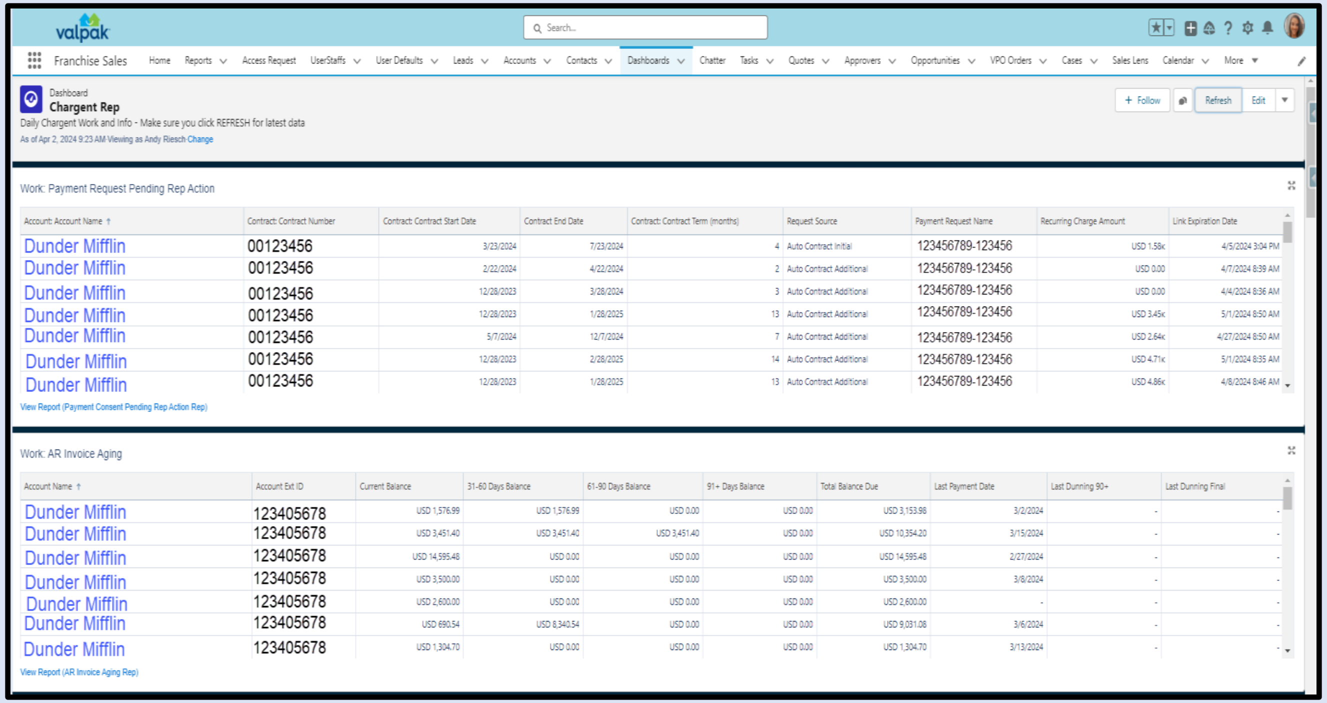
CHARGENT REP DASHBOARD: WORK



Questions the dashboard helps answer:

- Which clients do I need to get payment from?
- Which clients are past due?
- Who do I need to get a new credit card from?
- Which payments is billing still working on?
- When will my client be charged next?
- Which client needs to send their payment info?
- When will my client be charged next?
- When was my client last charged?
- Which clients’ payments are on hold for a specific reason?
- Which invoice was payment applied?

CHARGENT REP DASHBOARD: WORK



Main Sections

Rep Needs to Take Action

- Payment Request Pending Rep Action
- AR Invoice Aging
- Credit Cards Expiring Next 60 Days with Recurring
- Account Last Transaction is Error

Rep Needs to Monitor

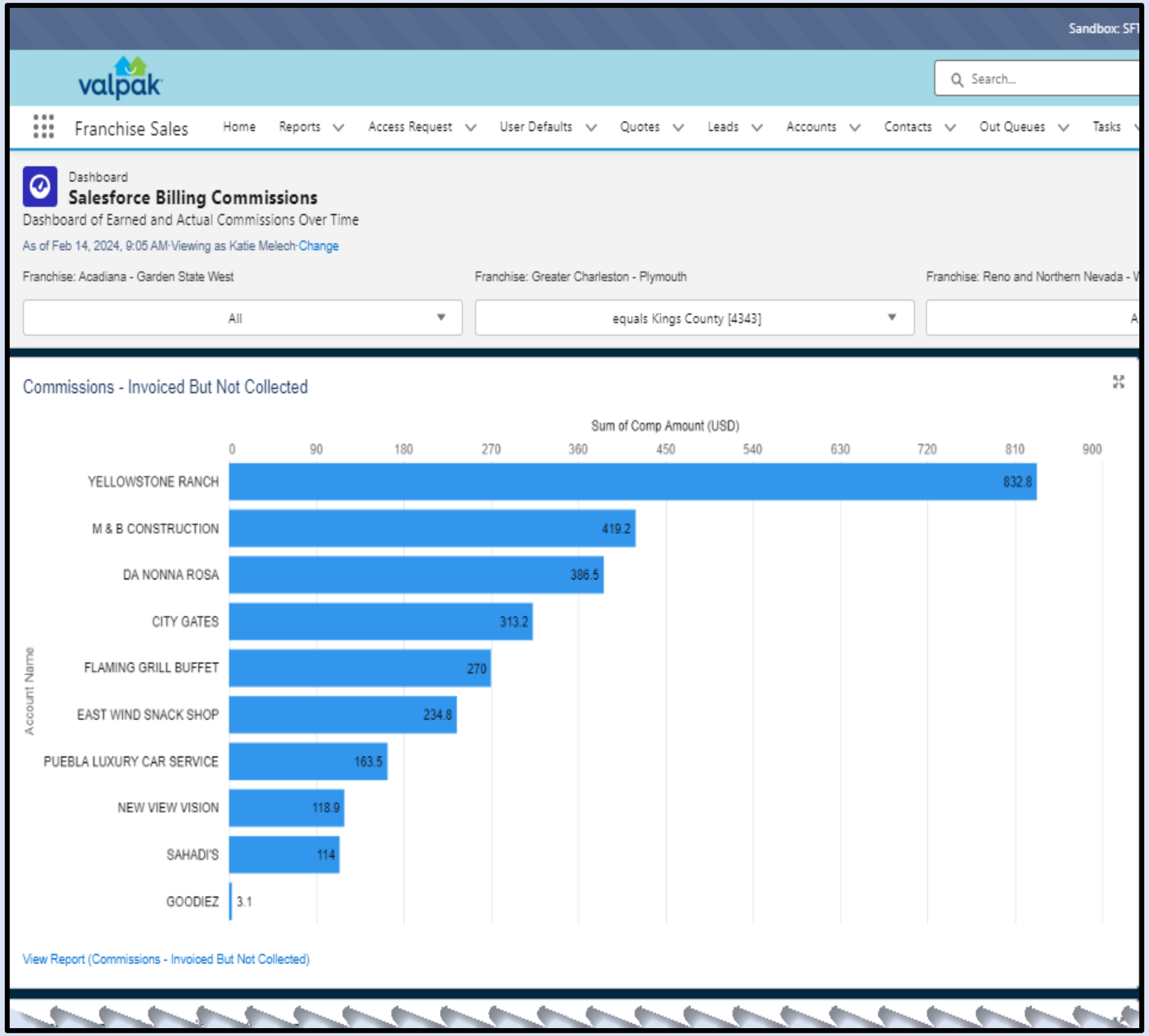
- Automated Recurring Errors
- Scheduled Recurring next 30 days
- Payment Consent Request Pending Client

Rep Nice To Know Information

- Payments Scheduled in Next 30 Days
- Last Transactions in past 30 days, 7 days, or 1 day
- Consents on Hold
  Billing Setting Up the Payment Schedule

COMMISSION DASHBOARD

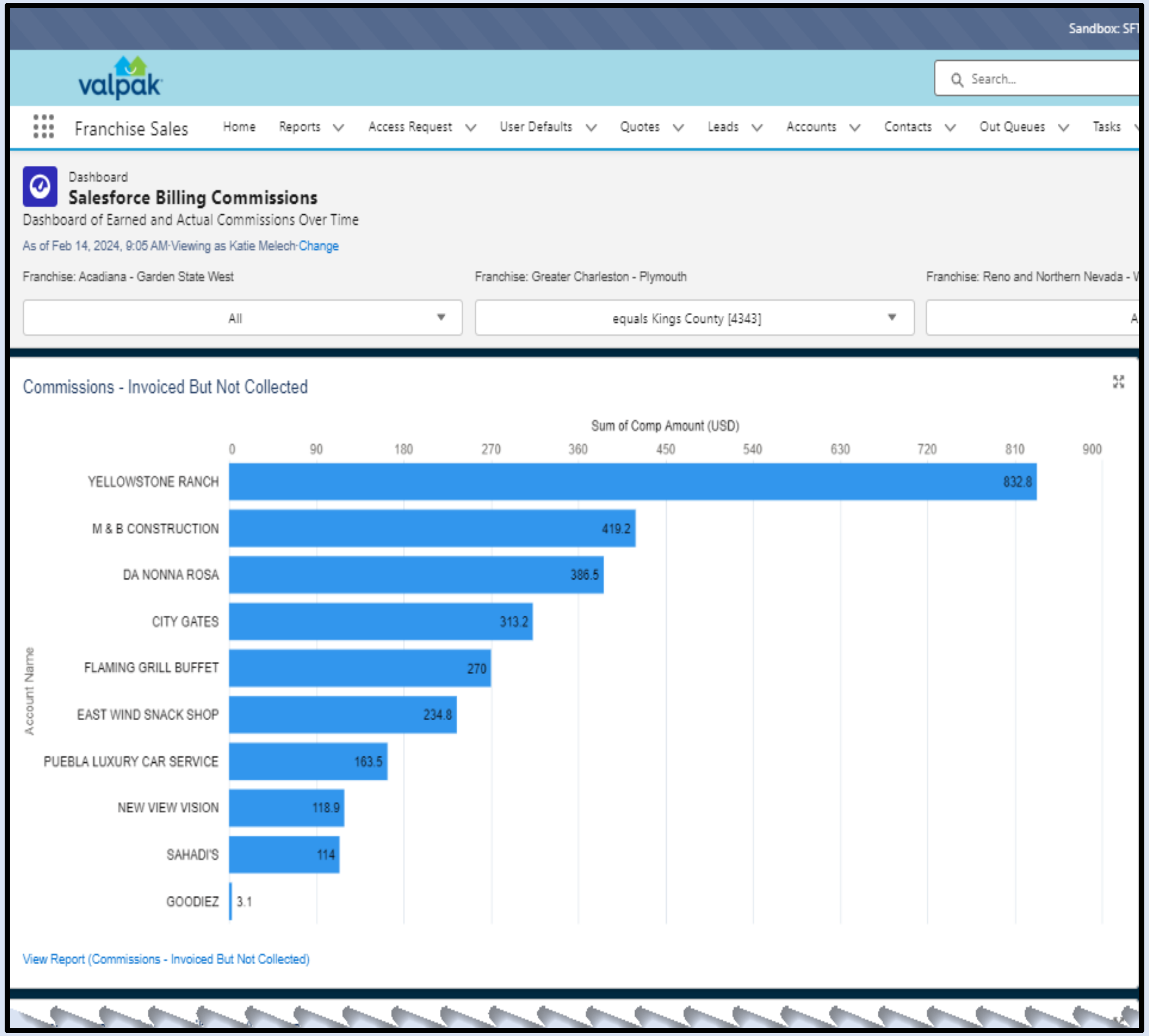
COMMISSIONS DASHBOARD



Questions the dashboard helps answer:

- Which clients need to pay and how much will the rep earn?
- How much in commission has the rep earned in 2024?
- Where is the process are commissions? Do I need to approve anything?
- What will appear in the rep’s paycheck?

COMMISSIONS DASHBOARD



Main Sections

Commissions – Rep Takes Action

- Commissions – Invoiced but not collected

Commissions - Informational

- Automated Recurring Errors
- Scheduled Recurring next 30 days
- Payment Consent Request Pending Client
- Commissions in Approval Process
  - Manager/RSA
  - GM
  - Payroll
- Last Export (What’s in Paycheck)

CASES

WHY CREATE A CASE?

Cases help you in a few different ways:

•Easy to submit requests for different types of support all within one platform, so you won't have to keep track of multiple department emails or contacts.

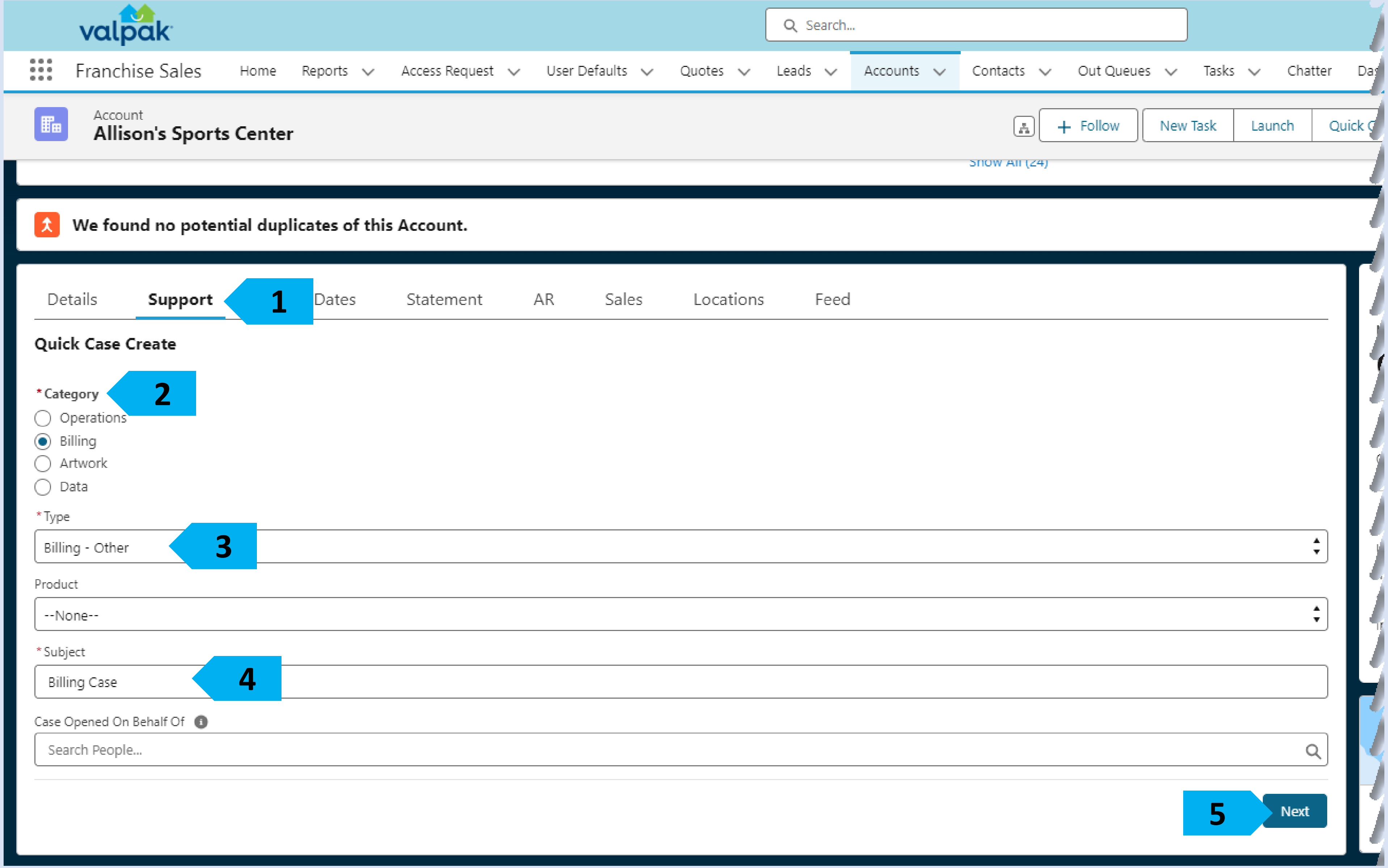
•Keeps all related information and files together to avoid searching for past email chains or multiple email threads – the info is all right there on the case record.

•Traffics requests to the right team for faster resolution.

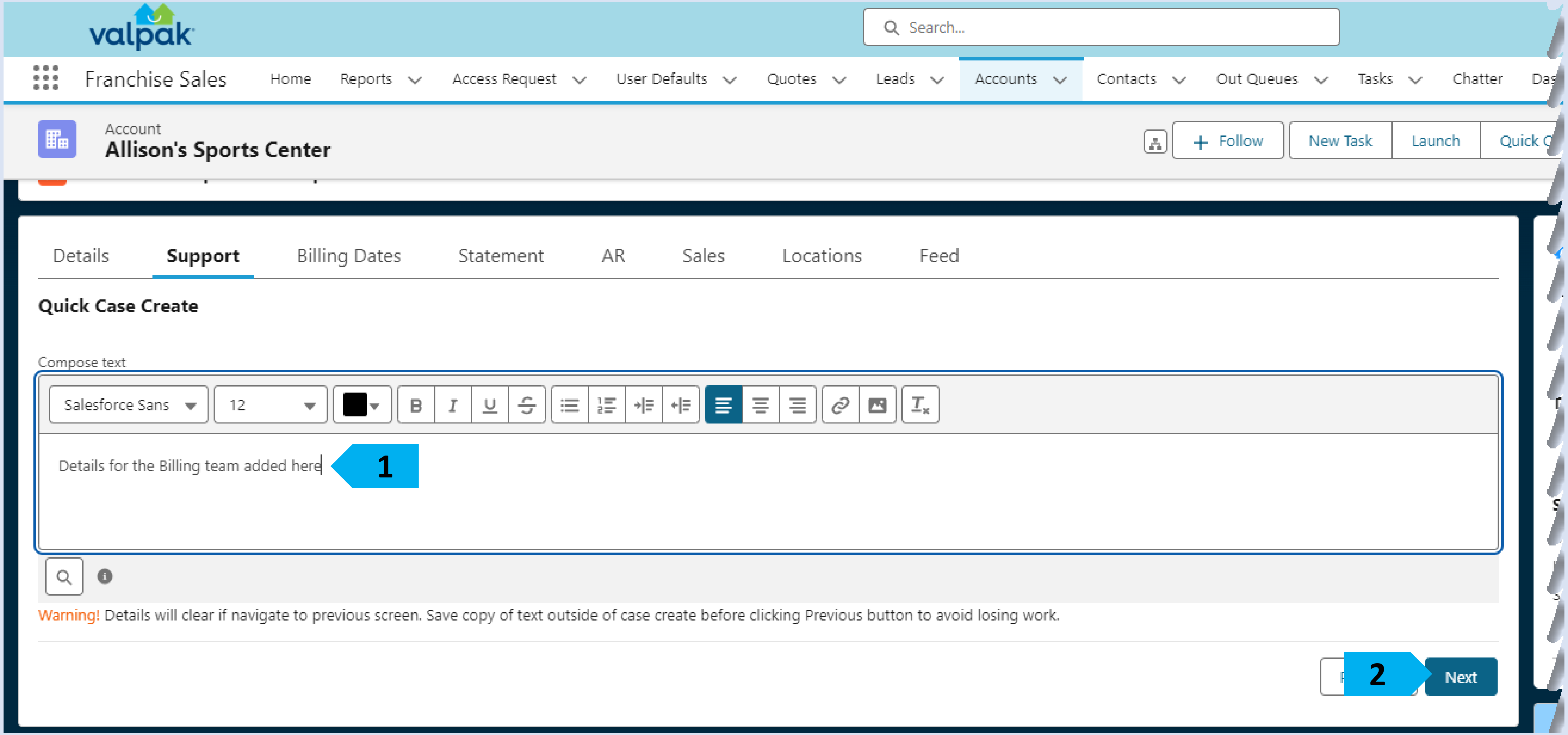
•Communications can happen directly with the subject matter experts.

CREATE A BILLING CASE

On the Account record, click on Support. Choose your Category, select a Type and fill in any additional fields that are available. Click Next.

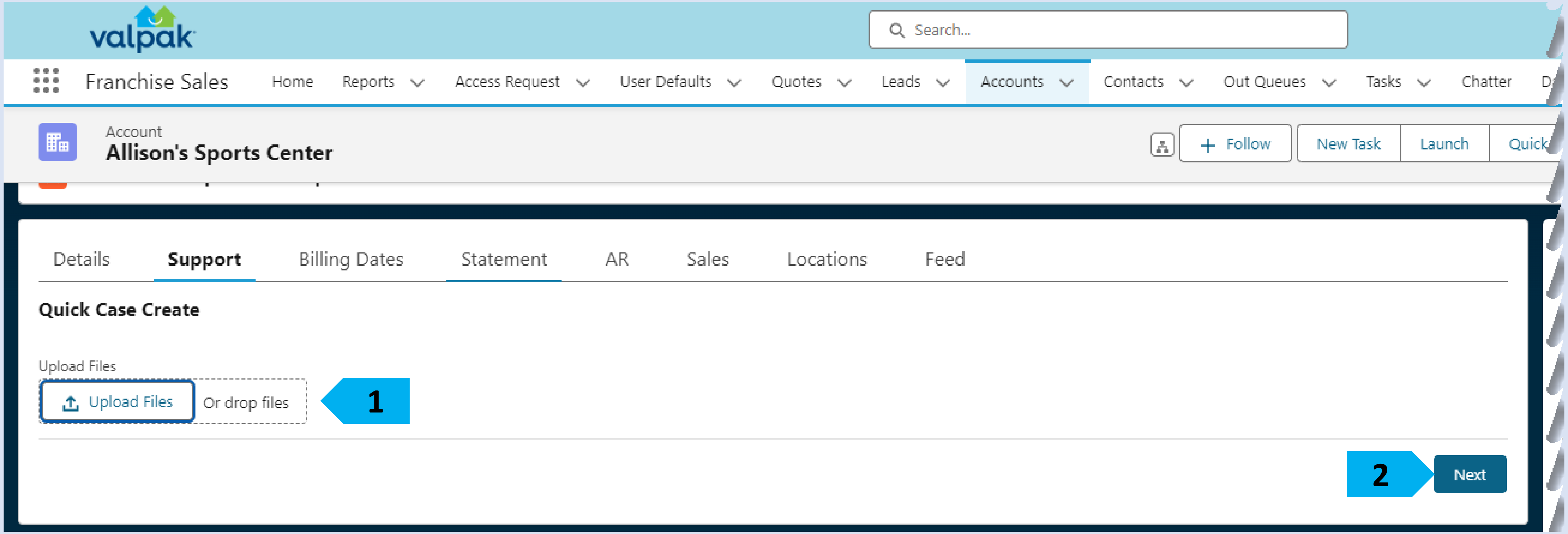


CREATE A BILLING CASE



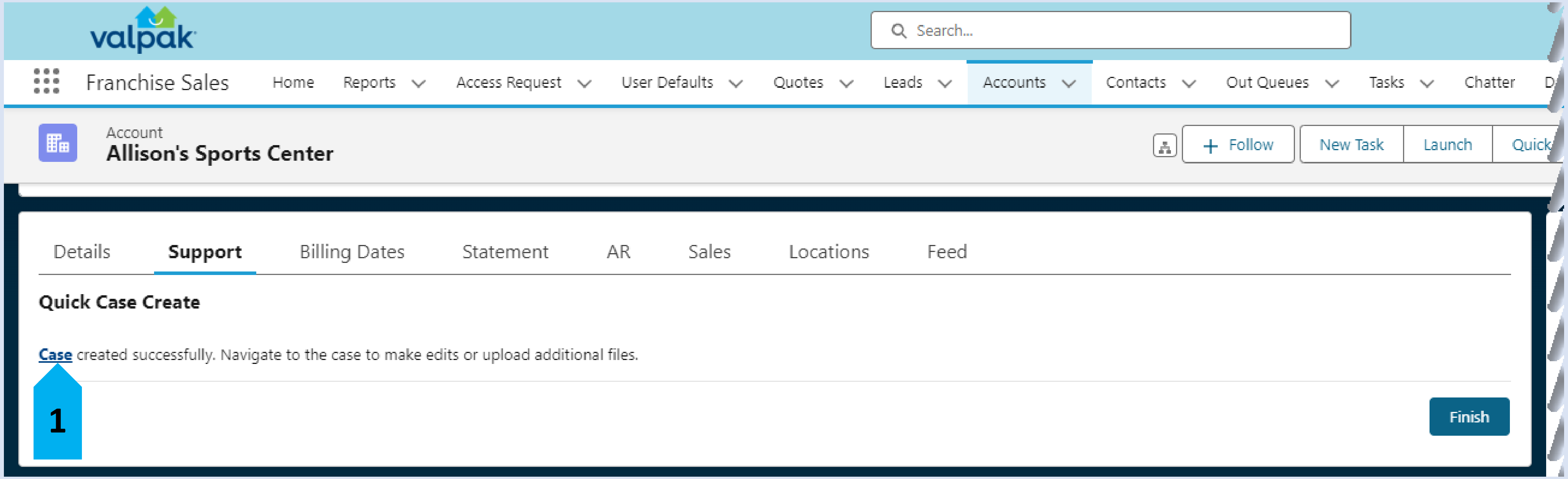
Add notes for the team that you are creating the case for so that they have information on what they need to assist with. Click Next.

CREATE A BILLING CASE

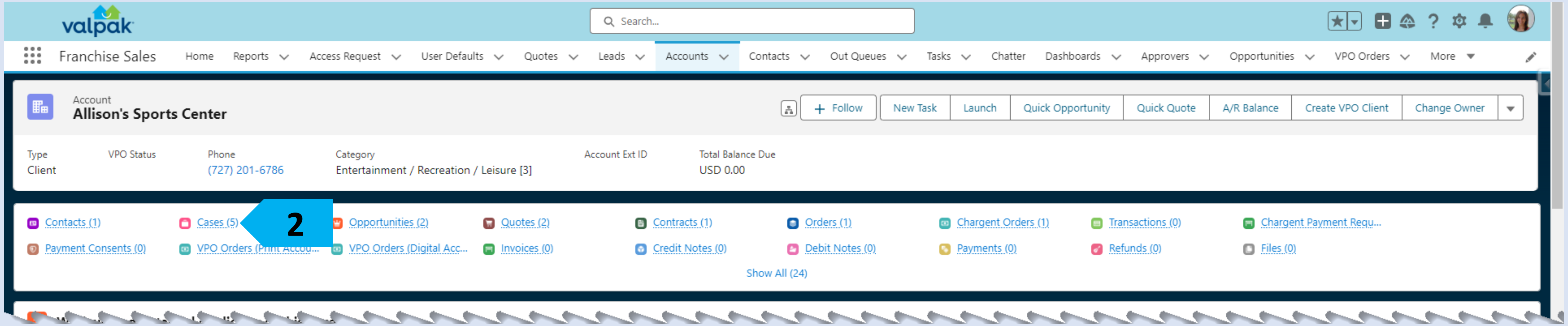


Upload any files you have associated to this case and click Next.

CREATE A BILLING CASE

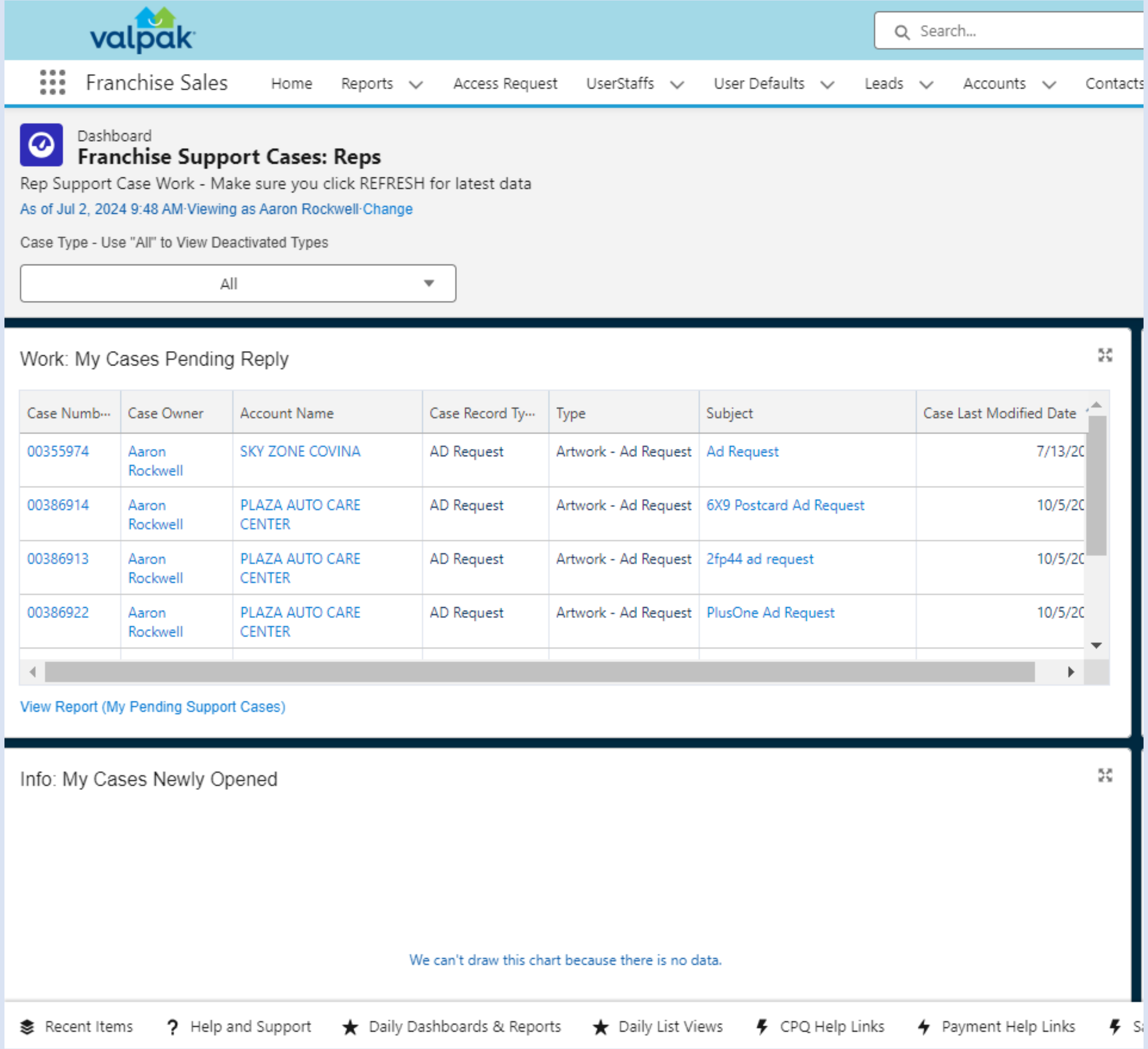


Click on Case to go to the Case record page you just created.
You can always find your Cases on the Account under the related links section.



CASES DASHBOARD

CASE DASHBOARD



Questions the dashboard helps answer:

- Do I have any Cases waiting on my response?
- Who is my OPS Support person?
- What Cases do I have that are pending support?