

FEATURE SHEET · DASHBOARD

Operations Dashboard

The daily desk view — headline KPIs, submitted and issued production across every line of business, four workspaces, and the working case list, all framed to the role you're viewing as.

FRAMED BY

**"View As" role — e.g. Anne Davis
· Case Manager**

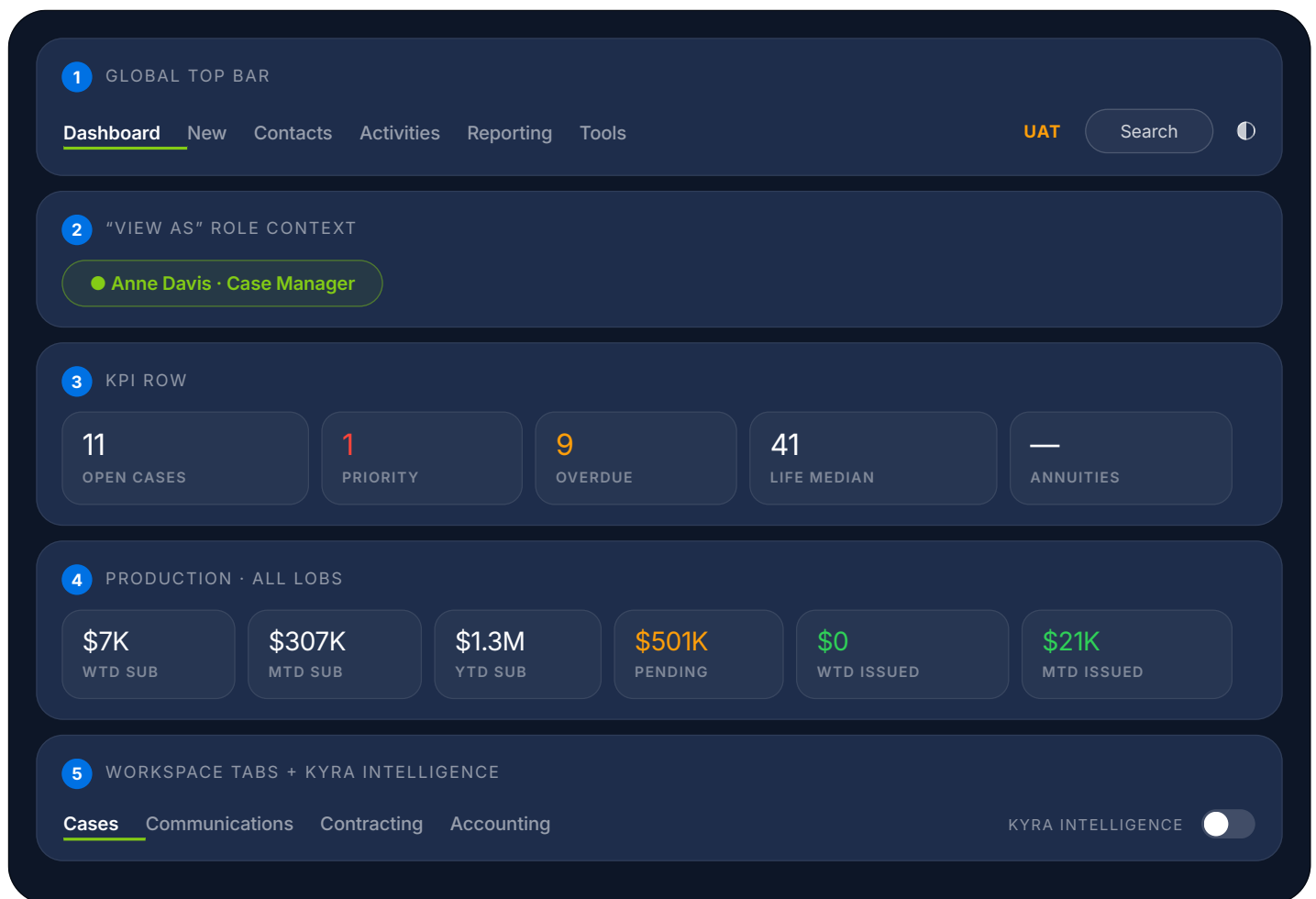
WHAT'S ON IT

**KPIs, production, four
workspaces, case list**

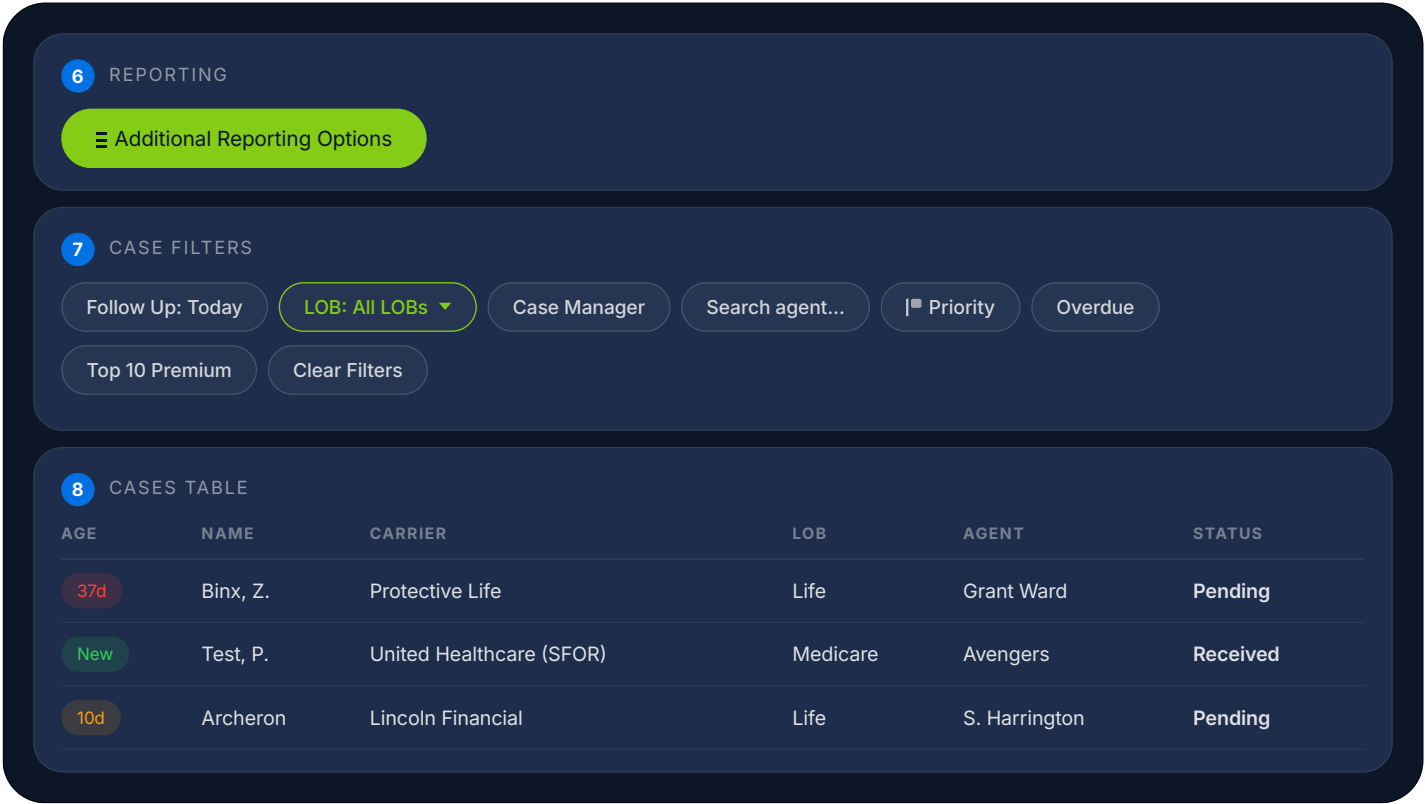
HOW TO NARROW IT

**Follow Up, LOB, Case Manager,
Agent + chips**

INTERFACE MAP · THE NUMBERS



Representative UAT data · dark navy is the live PulseConnect surface



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FEATURE KEY

- 1

Global top bar

Logo, main menu (Dashboard, New, Contacts & Accounts, Activities, Reporting, Tools, Favorites, Recently Viewed), the orange **UAT** environment tag, global search, profile menu, and the light / dark toggle. **Profile** → **Settings** also switches the **Navigation Layout** between horizontal top bar and a vertical left rail, live.
- 2

“View As” role context

Shows whose desk you’re working — e.g. **Anne Davis** · **Case Manager**. Frames every metric and list below to that person’s book.
- 3

KPI row

The day’s headline numbers: **Open Cases**, **Priority**, **Overdue**, **Life Median** (days), and **Annuities** — color-coded so risk reads at a glance.
- 4

Production · All LOBs

Submitted, Pending, and Issued premium across **WTD / MTD / YTD** for every line of business in one strip.
- 5

Workspace tabs + Kyra Intelligence

Four workspaces, plus the Kyra AI toggle. **Cases** — the working case list. **Communications** — Email, Activities, and Inbound E-Apps (newbusiness@pulsepointis.com, 323 e-apps, Start App / Delete). **Contracting** — Missing Schedule / Missing Hierarchy with the contract table. **Accounting** — Actions & Reports.
- 6

Additional Reporting Options

Opens the deeper reporting menu beyond the on-screen views.
- 7

Case filters

Narrow the list by **Follow Up**, a custom **LOB** dropdown (All LOBs, Annuities, Life, Variable, LTC, Medicare, Disability, Securities, Group, Benefit, AltInv), **Case Manager**, or **Agent** — plus quick chips for Priority, Overdue, Top 10 Premium, and Clear Filters.
- 8

Cases table

Each case shows a color-coded **Age** pill (incl. a green **New**), Follow Up, Name, Carrier, **LOB**, Agent, Assigned To, Policy #, the latest **Daily Pulse** note, Premium, and Status. Sortable by any column.

ABOUT THIS SHEET

Layout and typography rebuilt in the iOS/Apple business style; every menu name, KPI label, filter chip, and column header is carried over unchanged from the source sheet, and the interface map is a faithful redraw of its annotated replica — not a live capture — with representative UAT data. Cases table columns Follow Up, Assigned To, Policy #, Daily Pulse, and Premium appear in the feature key but **were not shown** in the source replica.