

FEATURE SHEET · DASHBOARD

Sales Dashboard

The revenue view — pipeline and agent KPIs, Life and Annuities premium side by side, and a funnel that shows where opportunities advance, stall, or drop.

WHAT IT TRACKS

Opportunities, activities, agents, placement ratio

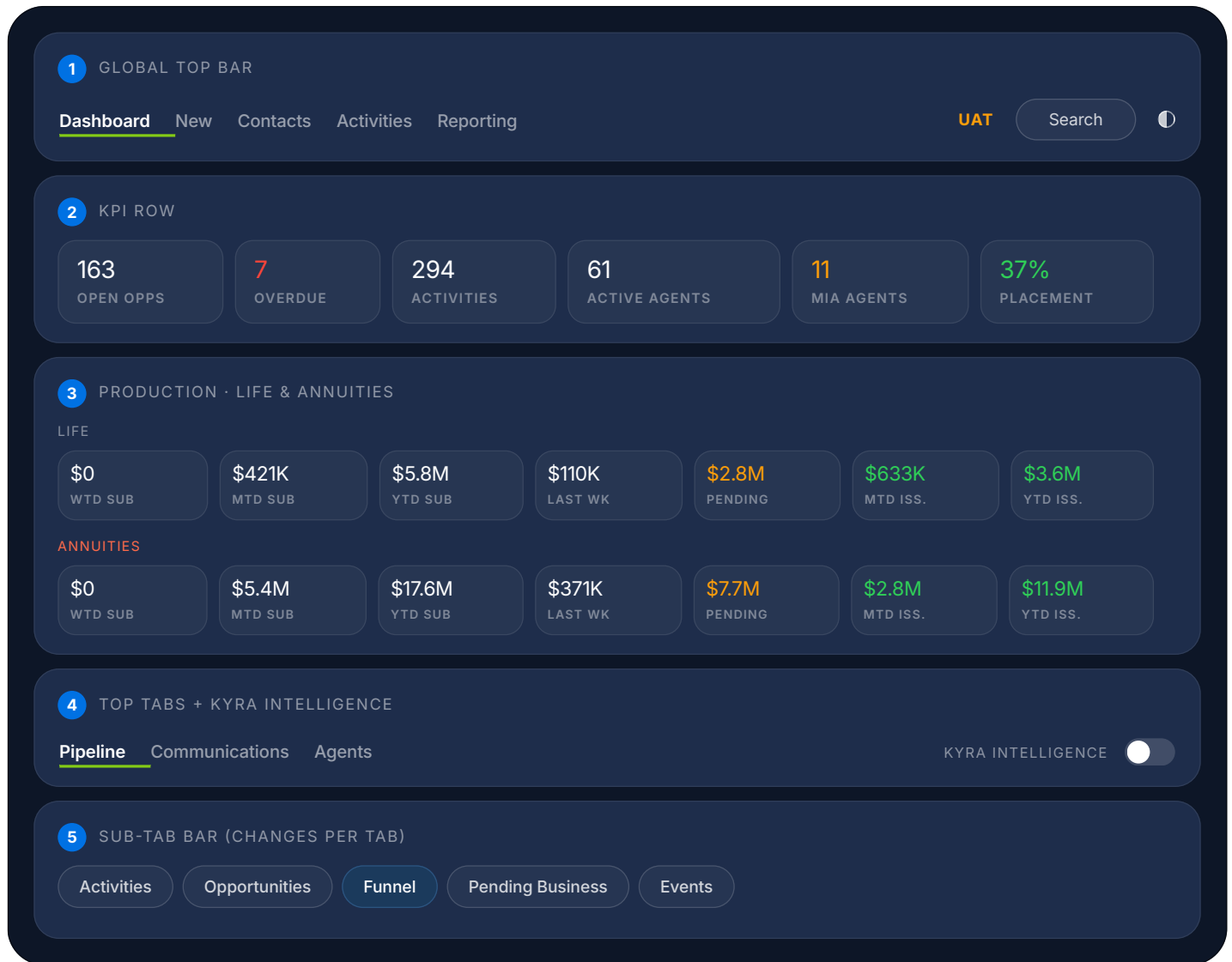
PRODUCTION SPLIT

Life and Annuities, submitted through issued

WHERE THE DEPTH IS

Funnel — advance, drop, and Kyra's read

INTERFACE MAP · THE NUMBERS



Representative UAT data · dark navy is the live PulseConnect surface



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FEATURE KEY

- 1 Global top bar**
 Shared chrome — menu, **UAT** tag, search, profile, light / dark toggle.
- 2 KPI row**
 The sales headline: **Open Opportunities, Overdue Activities, Total Activities, Active Agents, MIA Agents, and Placement Ratio.**
- 3 Production · Life & Annuities**
 Two rows of premium by line — Submitted (WTD / MTD / YTD), Last Week, Pending (amber), and Issued (WTD / MTD / YTD, green).
- 4 Top tabs + Kyra Intelligence**
 Three workspaces — **Pipeline, Communications, Agents.** The Kyra Intelligence toggle flips from the raw baseline view to Kyra's AI layer: retention plays, opportunity reads, event ROI, agent behavioral reads, and auto-drafted outreach.
- 5 Sub-tab bar**
 The lime sub-tabs change with the active workspace.
Pipeline: Activities · Opportunities · Funnel · Pending Business · Events. **Communications:** Daily Pulse · Email · Cases Maturing · Marketing Rep Report · Leaderboard. **Agents:** Contracted Agents · Non Contracted · By Carrier · Birthdays · Groups · Producers · Clients · Agents Submitting Monthly · Agent Recruiting & Retention.
- 6 Content area**
 The active view renders here. **Activities** — log calls/emails/meetings/tasks/notes + Today's Activities. **Opportunities** — stage, premium, LOB, carrier, days, follow-up. **Funnel** — a 5-tile KPI strip (Opportunities, Submitted/Pending, Placed, Lost, Placement Rate), Period & LOB filters that switch the whole view between All / Life / Annuity, a proportional Opportunities → Submitted → Placed chart with advance / drop annotations at each step, a Lost Business breakdown by reason (Withdrawn / Not Taken / Declined with sub-reasons), and Kyra's funnel read plus detected patterns. **Pending Business** — stage / LOB / flagged filters, SLA progress bars, and a Pulse score per case. **Events** — past & upcoming with pipeline AP. **Agent Recruiting & Retention** — the MIA / reactivation / retention chart.

ABOUT THIS SHEET

Layout and typography rebuilt in the iOS/Apple business style; every KPI label, tab name, sub-tab list, and feature description is carried over unchanged from the source Sales Dashboard sheet, with representative UAT data. The funnel bars are drawn proportional to the source case counts; the **Period & LOB filters, Lost Business sub-reasons, and Kyra's three detected patterns are named in the feature key but were not shown** in the source replica — confirm against live UAT. Note also that the source sheet describes the sub-tabs as lime while its own replica renders the active sub-tab as a solid blue pill — the blue is reproduced here.