Sales Report — SOP

How this module works

A read-only sales-intelligence dashboard — pulls together leads, proposals, and invoice data into one period-filtered view of pipeline health, conversion, and revenue. It never edits anything in those modules; it only reads and summarizes.

SECTIONS

KPI Cards
Six headline numbers for the selected period — New Leads, Revenue Collected, Conversion Rate, Pending Payments, Avg Deal Size, and Proposals Pipeline — each with a change indicator vs the previous period.

Trend Charts
Monthly Revenue and Leads by Month, always showing the trailing 6 months regardless of the period filter above.

Conversion Funnel
Every lead status this period, in order, with count and percentage of total.

Source ROI Analysis
Every lead source ranked by a combined ROI score — leads, proposals sent, converted, revenue, and average score. Click a row to see its individual leads; click a column header to sort.

Top Leads / Lost Deals
The highest-scoring active leads this period, and every deal marked lost with its value.

Team Performance
Per-assignee leads, conversions, win rate, and revenue for this period.

Proposals / Follow-up / Revenue by Service
Proposal pipeline status, follow-up completion rate, and revenue broken down by service category.

Sales Insights
Rule-based observations about this period's own numbers — no AI call, always in sync with what's on screen.

STEP-BY-STEP WORKFLOW

1. Pick a period at the top — This Week, This Month, Last Month, This Quarter, This Year, or a Custom Range.
2. Scan the 6 KPI cards for a fast read on the period — each shows its change vs the period immediately before it.
3. Open Source ROI Analysis to see which lead source is actually converting and paying, not just generating volume.
4. Check Sales Insights at the bottom for the 5 most actionable observations already surfaced for you.
5. Use Export (top-right) to download the full report as PDF, Word, HTML, or Excel — it respects whatever period is currently selected.

CONNECTIONS

Leads
Every number here is read directly from Leads — new-lead counts, conversion funnel, lead source, and the Report button on the Leads page opens this exact view.

Proposals
Pipeline count and value, proposals-sent/accepted counts, and the Proposals Performance table all read live from the Proposals module.

Invoice

Revenue Collected and Pending Payments are read from paid and sent invoices — this report never creates or edits an invoice.

Follow-up OS

Follow-up Performance reads scheduled/completed/overdue counts directly from the same data Follow-up OS manages.

This SOP is confidential and for internal use only.

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