

# Getting Started with the Dalikoo Dashboard

Dalikoo is centred around a dashboard that will let you view, filter and sort your business opportunities quickly and provide real time summaries.

This guide will help walk you through the stages of sorting and filtering, manipulating forecast displays, how to create saved views for commonly used reports, and how to export those reports to excel files that you can use in a number of effective ways for your business.

## Before we get into the details, what kind of screen are you working on?

If you're working on a laptop with a 13" or smaller screen, note the Hide menu button that appears on every page of the Dalikoo dashboard. This will hide or reveal the left-hand navigation menu and give you screen real estate to view your Dashboard in greater detail if you choose.

## First step - Adding Clients

At this point, you will have added your clients to the client list. This is a simple process in Dalikoo, by clicking Clients on the left-hand Management list. Then add new client. Fill in the fields with the required and option information.

Hide menu

[+ new client](#) or [edit this list](#)

All Items ...

✓	Site	Contact Name	Company Name	Address	Work Phone	Cell Phone	Email	Fax Number
		Jack Hannah	... Toronto Zoo					
		Joe Smith	... Shoes and Stuff Ltd.					
		Bob Doe	... Hollywood Productions					
		Jane Smith	... Rolling Gears					
		Samantha Jones	... Acme Construction					
		Jack Katz	... 5 star Auto					

## Second Step - Opportunity Types

Adding opportunity types is where you begin to customize Dalikoo for your business needs. Whether you are in construction, software development, landscaping, or import/export, Dalikoo is a simple business management tool and this begins with Opportunity Types.

## How to add Opportunity Types

Begin by clicking Opportunity Types on the left-hand navigation menu (unhide it, if you've hidden it) under Management.

There are no restrictions on the types of opportunities you can manage in Dalikoo. If you import and export goods, perhaps you will have a list, that looks like like this one.

If you are in the landscaping business, you would work with different types of plant arrangements, brick, masonry and concrete work, and so forth.

Populate your opportunities by clicking new opportunity type. This will open a form that lets you name the opportunity type.

Repeat for as many opportunity types as you expect to be working with in the immediate future. You can add more later, and edit or delete existing types.

Once you've added all of the Opportunity Types for your current and prospective projects, you can move to the next step.

Hide menu

 **new opportunity type** or **edit this list**

All Items ...  

 Opportunity Type
Food Supply ...
Shoes ...
Purses ...
Networking ...
Furniture ...
Power Bars ...
Auto Parts ...

## Third Step - Adding Opportunities

In Dalikoo, Opportunities represent your work, from the moment they become a lead, until the time the project is complete. Opportunities are simple to input into the system.

Click Opportunities on the left-hand Management list, then Add Opportunity. Complete the required fields and any relevant optional fields.

You need to have the client added to your client list before you can assign an account name. Assigning a Year and Quarter to your opportunity will help you when you start looking at forecast views later in this how-to. The Odds field will also play heavily in your forecasts – you may wish to experiment with that. Finally, when you get into further advanced features of Dalikoo, the Status field will become important. At this stage, it is not.

Hide menu

[+ new opportunity](#) or [edit this list](#)

All Items ...

Total Revenue: \$ **15,005**      Total Factored Revenue: \$ **11,2531**  
Total Cost: \$ **2,000**      Total Factored Cost: \$ **1,500**  
Total Margin: \$ **13,005**      Total Factored Margin: \$ **9,7531**

✓	Site	Opportunity Id.	Opportunity Name	Account Name	Region	Year	Quarter	Revenue	Cost	Odds	Status	
		No Title #	...	Metal Bars	Acme Construction			5	0	50%		
		No Title #	...	Prop construction	Hollywood Productions	Canada	2017	Q2	15,000	2,000	75%	Qualified

## How To Add an Opportunity

Click new opportunity in the Opportunity view.

Complete all required and relevant information in the add opportunity form.

BROWSE EDIT

Save Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Opportunity Name \*

Opportunity Id.   
This field is optional, if you have an opportunity tracking number please enter it here.

Description

Account Name \*

Project Owner

Year

Quarter

Product

Status

Odds \*

Revenue \*

Cost \*

Discount  %

Region

Currency

Service

Opportunity Type

Start Date

End Date

Next Step

Save Cancel

Here you are. You've populated your list of Opportunities with some leads, and maybe even contracts that you've won. Now what?

## Sorting and Filtering

Dalikoo lets you sort and filter using any column of data. As you sort and filter, you'll see that the sums are updated automatically based on the visible opportunities.

Looking at the Total Factored Revenue, Cost and Margins, you'll see that those are based on the probabilities you assigned your leads.

You should spend a few minutes familiarizing yourself with the various ways you can sort and filter that are meaningful to your business. Once you've done that, we're ready to look at forecast projections.

## How to Sort and Filter

You can sort and filter your opportunities by clicking the down arrow beside any category column on your opportunities list.

Click the down arrow, and a menu will appear that allows you to check which items you would like included in your view.

Sort by selecting whether to arrange by that column in ascending or descending order (alphabetically or numerically).

You can have multiple active filters at a time. For example, you can filter by region and year, to see only opportunities in Canada for the upcoming year.

The screenshot shows the Dalikoo interface. At the top, there is a 'Hide menu' link and a '+ new opportunity or edit this list' button. Below this is a search bar labeled 'Find an item'. A summary section displays the following statistics:

Total Revenue: \$ 5	Total Factored Revenue: \$ 31
Total Cost: \$ 0	Total Factored Cost: \$ 0
Total Margin: \$ 5	Total Factored Margin: \$ 31

The main table has columns: Site, Opportunity Id., Opportunity Name, Account Name, and Region. The 'Opportunity Name' column is selected, and a dropdown menu is open. The menu options are:

- A on Top (with an upward arrow icon)
- Z on Top (with a downward arrow icon)
- Clear Filters from Opportunity Name (with a trash icon)
- Metal Bars (with a checkbox icon)

A 'Close' button is located at the bottom of the dropdown menu. The table shows one row with 'No Title' in the 'Opportunity Name' column and 'Acme Construction' in the 'Account Name' column.

## Forecast Projections

Let's say you want to know your Total projected revenue for Q3 2017. With Dalikoo, you can easily see your projections by filtering your Opportunities list by Q3 and 2017. Similarly, if you wanted to see the 2<sup>nd</sup> half of 2017, you'd filter by Q3 and Q4, and 2017.

When you apply those filters, the totals, will automatically update, and the Factored Revenue, Cost and Margins will reflect the Odds of winning the contract. A \$10 000 Opportunity

### How to use forecasts in your Opportunities list.

As you use sorting and filtering you will become more familiar with how to read the Totals and Factored Revenue, Cost and Margins.

Total is the sum of all Revenue, Cost and Margin columns for Opportunities you have entered in the system or, the current filtered view.

Factored is the sum of all Revenue, Cost and Margin multiplied by the Odds of winning the business opportunity.

Factored is a simple way to project your rolling budget for a given time period.

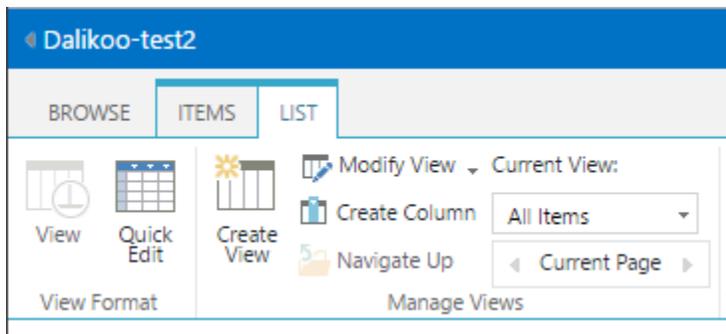
## Saving Views for Quick Reference

Dalikoo allows you to create saved views. This allows you to recall your filters based on common settings. This might be to quickly see 2017 Q3 projections, as your business development staff add opportunities, for example. Or, regional client reps may need to quickly reference their specific region.

### How to save a view

To Save a view, look for the List tab above your Dalikoo view.

On the List menu, select Create View.



To create Opportunity views, you will want to use the Standard View type.

Choose a view type

 **Standard View**  
View data on a Web page. You can choose from a list of display styles.

 **Datasheet View**  
View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.

 **Calendar View**  
View data as a daily, weekly, or monthly calendar.

 **Gantt View**  
View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.

Select the columns you would like displayed in the view using the check boxes, and how you would like the columns ordered. Then, you select the criteria you would like to use for filtering and sorting.

Take some time to explore the view settings to create easy to reference views that suit your business needs.

## Exporting to Excel or CSV

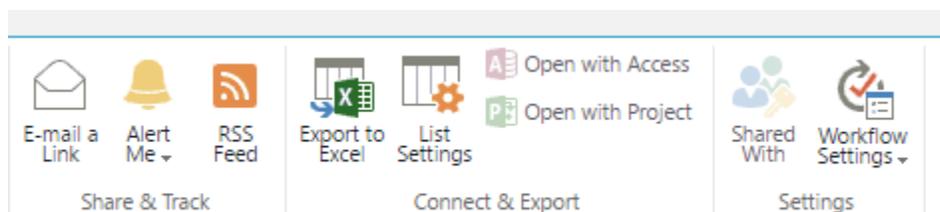
One of the features of Dalikoo that makes it a powerful tool for every team – from finance to marketing – is the ability to export to Excel. Through this feature, you can take your data from Dalikoo and import it into other tools you use for your business – whether it's Mailchimp or Constant Contact for email campaigns, or managing your company budgets with projected revenue, operating expenses and payroll.

If you're familiar with using filters and sorting in Excel, you can use your exported data to create mailing lists, gross revenues,

These are just some examples. You know your business and needs the best, and how the excel files you can export will be useful to you. Refer to the Interesting Use Cases document for more ideas to use exported Excel documents.

### How to Export to Excel

From the List tab at the top of your page, where you created your view, look to the right and select



Select where you would like you save the file. You can then open it in Excel and work with the data as required.

## Customizing Columns

You aren't restricted in your Dashboard by the default columns. You can customize your view by clicking the ... menu above the dashboard.

Hide menu

[+ new opportunity](#) or [edit this list](#)

All Items



Find an item



Modify this View

Create View

Total Revenue

Total Factored Revenue: \$ **142,5031**

Total Cost: \$ **102,000**

Total Factored Cost: \$ **64,000**

Total Margin: \$ **108,005**

Total Factored Margin: \$ **78,5031**

Click Modify this View.

Then use the check boxes and the Position from Left drop-downs to add, remove or reorder your dashboard columns.

#### Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Site	1 ▼
<input checked="" type="checkbox"/>	Opportunity Id. (linked to item with edit menu)	2 ▼
<input checked="" type="checkbox"/>	Opportunity Name	3 ▼
<input checked="" type="checkbox"/>	Account Name	4 ▼
<input checked="" type="checkbox"/>	Region	5 ▼
<input checked="" type="checkbox"/>	Year	6 ▼
<input checked="" type="checkbox"/>	Quarter	7 ▼
<input checked="" type="checkbox"/>	Revenue	8 ▼
<input checked="" type="checkbox"/>	Cost	9 ▼
<input checked="" type="checkbox"/>	Odds	10 ▼
<input checked="" type="checkbox"/>	Status	11 ▼
<input checked="" type="checkbox"/>	Project Owner	12 ▼
<input checked="" type="checkbox"/>	Product	13 ▼
<input checked="" type="checkbox"/>	Service	14 ▼
<input checked="" type="checkbox"/>	Discount	15 ▼
<input checked="" type="checkbox"/>	Margin	16 ▼
<input checked="" type="checkbox"/>	Currency	17 ▼
<input checked="" type="checkbox"/>	Start Date	18 ▼
<input checked="" type="checkbox"/>	End Date	19 ▼
<input checked="" type="checkbox"/>	Opportunity Type	20 ▼
<input type="checkbox"/>	App Created By	21 ▼
<input type="checkbox"/>	App Modified By	22 ▼
<input checked="" type="checkbox"/>	Attachments	23 ▼
<input type="checkbox"/>		...

Click Ok, and you'll return to the Dashboard with your changes in effect.

## Advanced Feature – Import Opportunities from Excel Spreadsheet

If you have been tracking your business opportunities in a spreadsheet, you can quickly import them from Excel.

Format your spreadsheet so the columns align with your Dalikoo dashboard.

Ensure you're working in Dalikoo within a **Microsoft web browser** (Internet Explorer or Edge on Windows 10)

Select your columns to import and simply copy and paste them into your web browser with the Dalikoo Dashboard open in your active tab.