

Using the Sales Reporting Dashboard



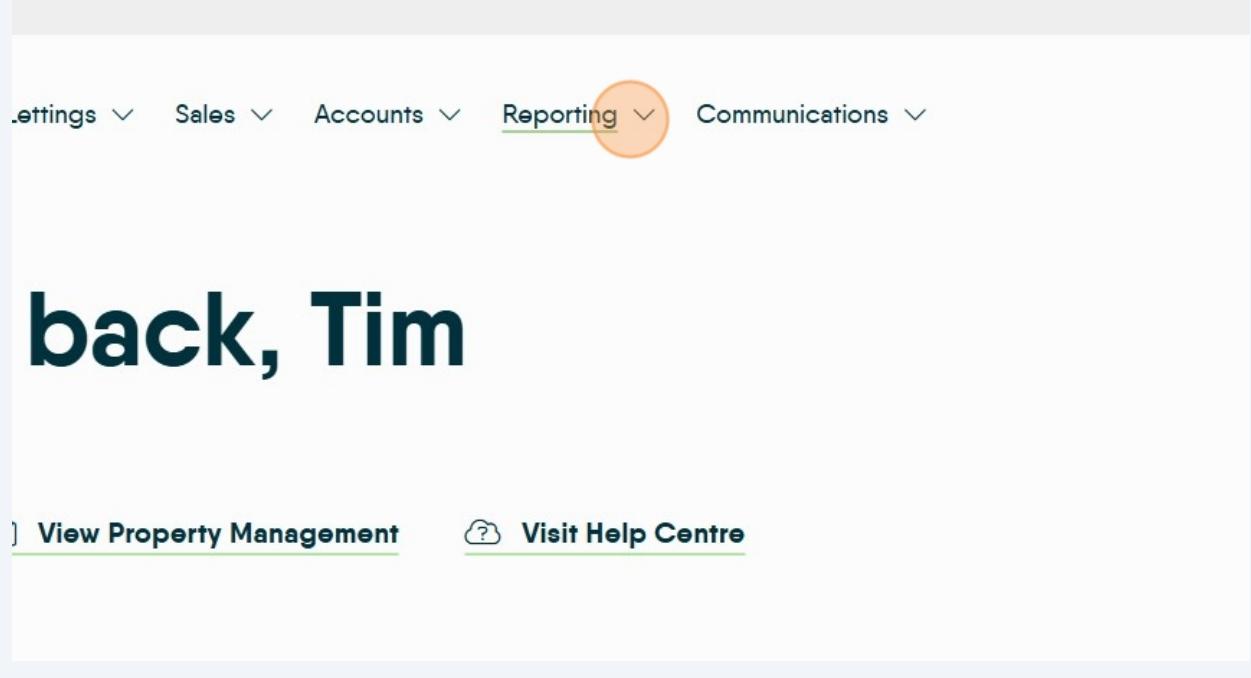
This guide provides an overview of how to effectively use the Reporting Dashboard for Sales Reporting and Sales Pipeline analysis. By following the steps outlined, users can easily customise their reporting views to access historical data and upcoming figures across multiple branches.

The guide also offers tips on utilising filters and interpreting data, making it an essential resource for anyone looking to enhance their sales reporting capabilities.

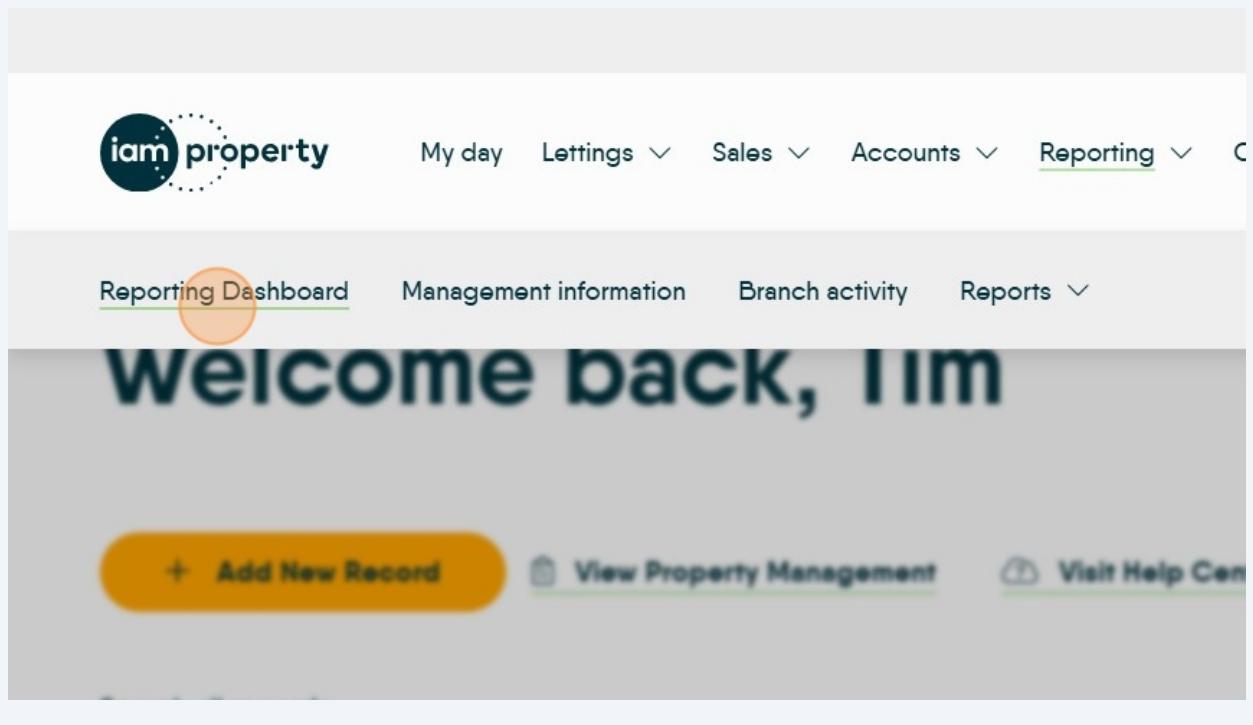
- 1 Please note you will need to have access to the Reporting Dashboard Module before being able to use this guide.

Details on how to do this are available [here](#).

- 2 In the top navigation, click "Reporting"



3 In the sub-menu, click "Reporting Dashboard".



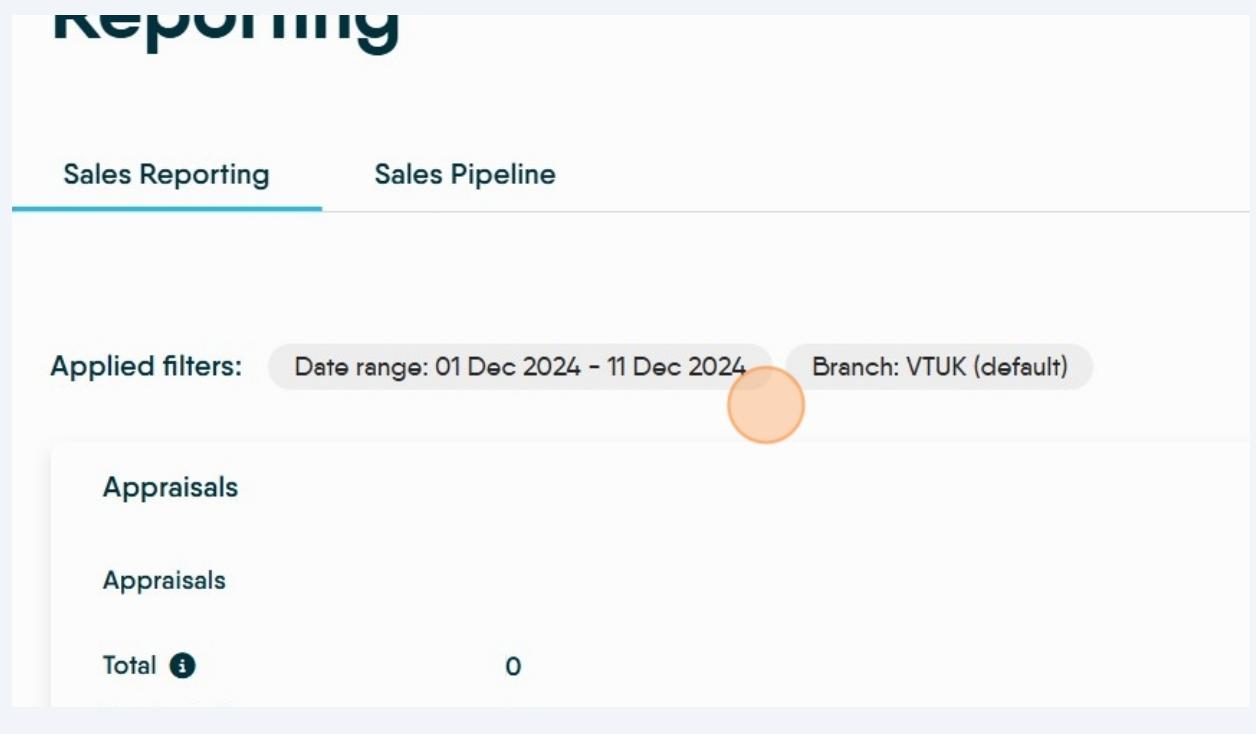
i There are 2 tabs of reporting available:

Sales Reporting - Steps 4 to 12 - This will show you historic reporting for a selected date range.

Sales Pipeline - Steps 13 to 22 - This will show you any upcoming reporting.

4 When you click into Reporting Dashboard, you will first see Sales Reporting.

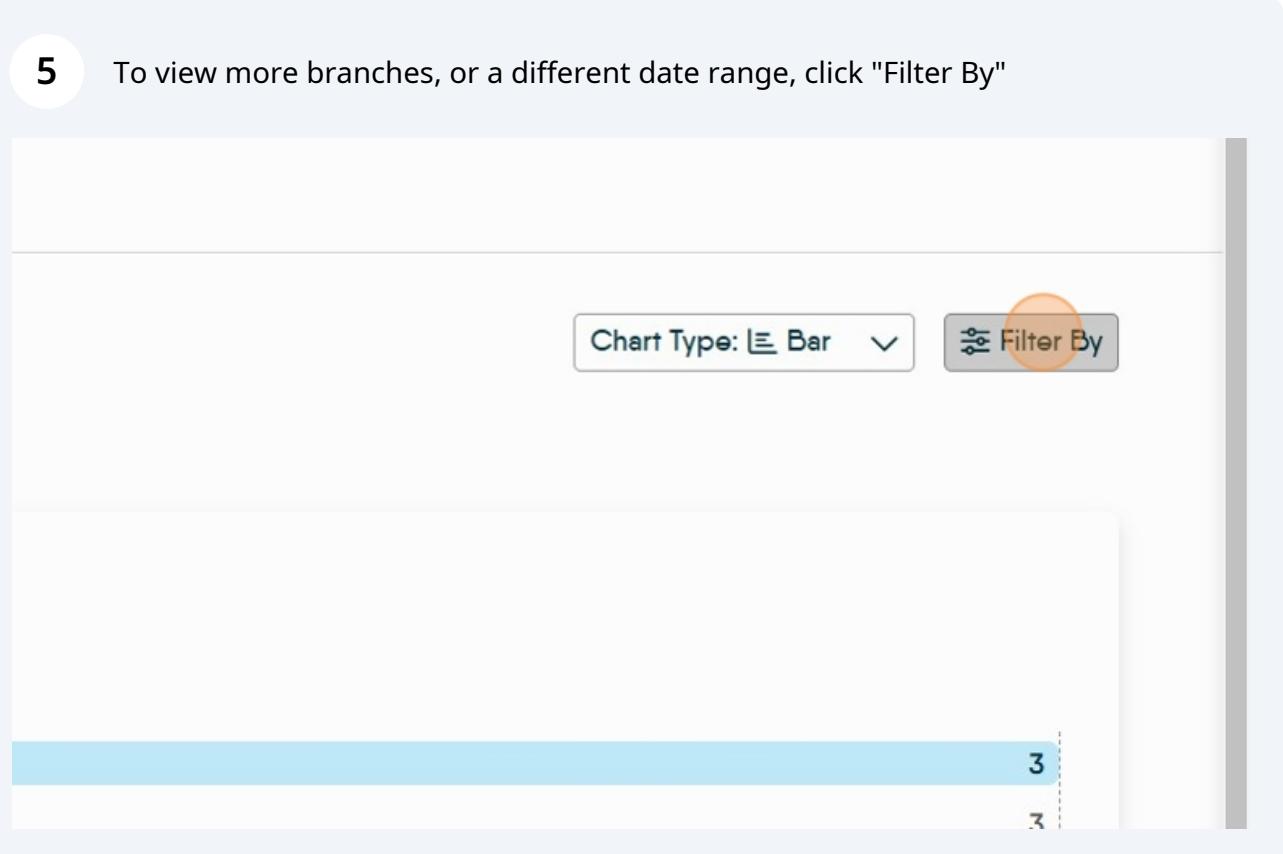
By default, you will see figures from the current calendar month, and your user's branch.



The screenshot shows the Reporting dashboard with the 'Sales Reporting' tab selected. At the top, there are two buttons: 'Sales Reporting' (underlined in blue) and 'Sales Pipeline'. Below these are filter options: 'Applied filters: Date range: 01 Dec 2024 - 11 Dec 2024' and 'Branch: VTUK (default)'. A large orange circle highlights the 'Branch' filter button. The main content area shows a section titled 'Appraisals' with a sub-section also labeled 'Appraisals'. Below this, a table shows a single row: 'Total' with a value of '0'.

Total	0
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5 To view more branches, or a different date range, click "Filter By"

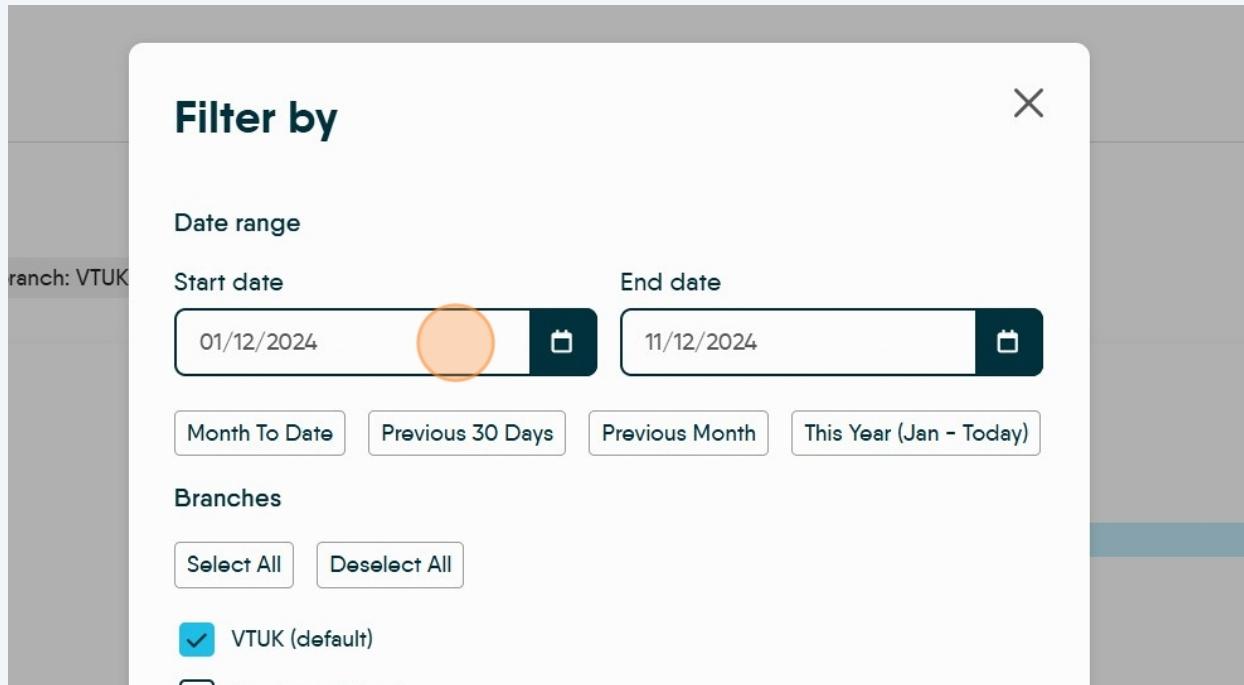


The screenshot shows the Reporting dashboard with the 'Sales Reporting' tab selected. At the top, there are two buttons: 'Sales Reporting' (underlined in blue) and 'Sales Pipeline'. Below these are filter options: 'Applied filters: Date range: 01 Dec 2024 - 11 Dec 2024' and 'Branch: VTUK (default)'. A large orange circle highlights the 'Filter By' button. The main content area shows a section titled 'Appraisals' with a sub-section also labeled 'Appraisals'. Below this, a table shows a single row: 'Total' with a value of '0'.

Total	0
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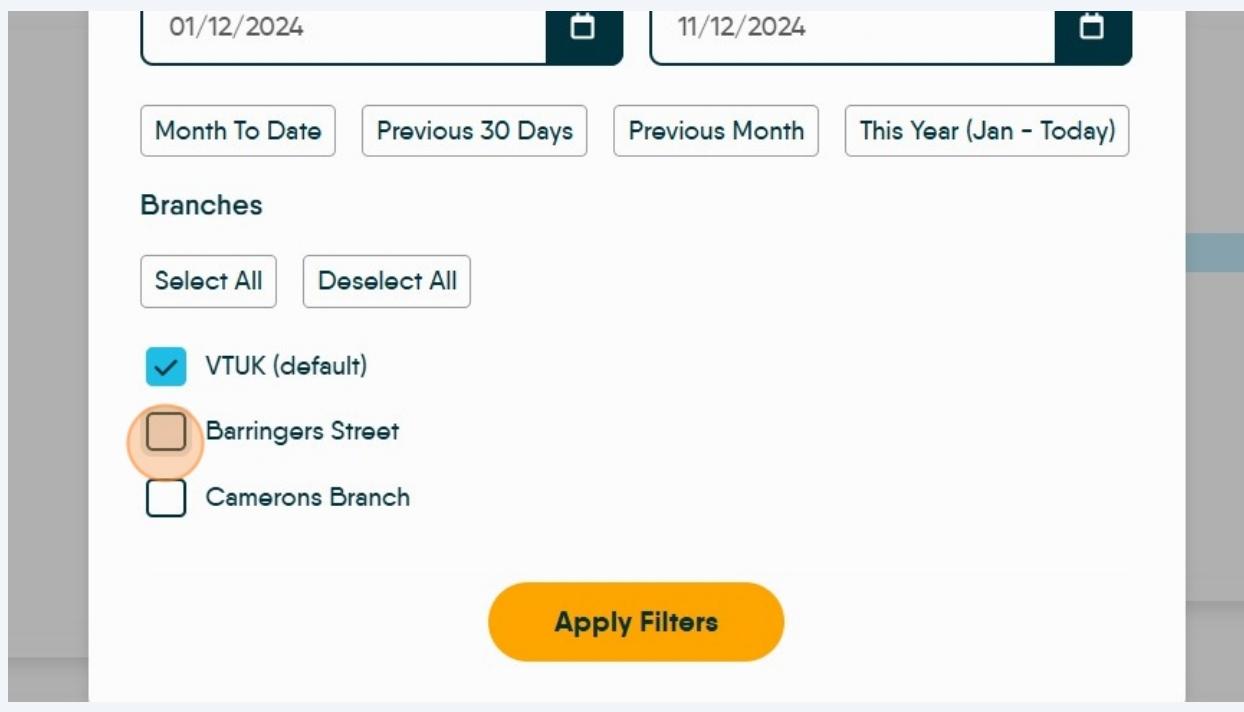
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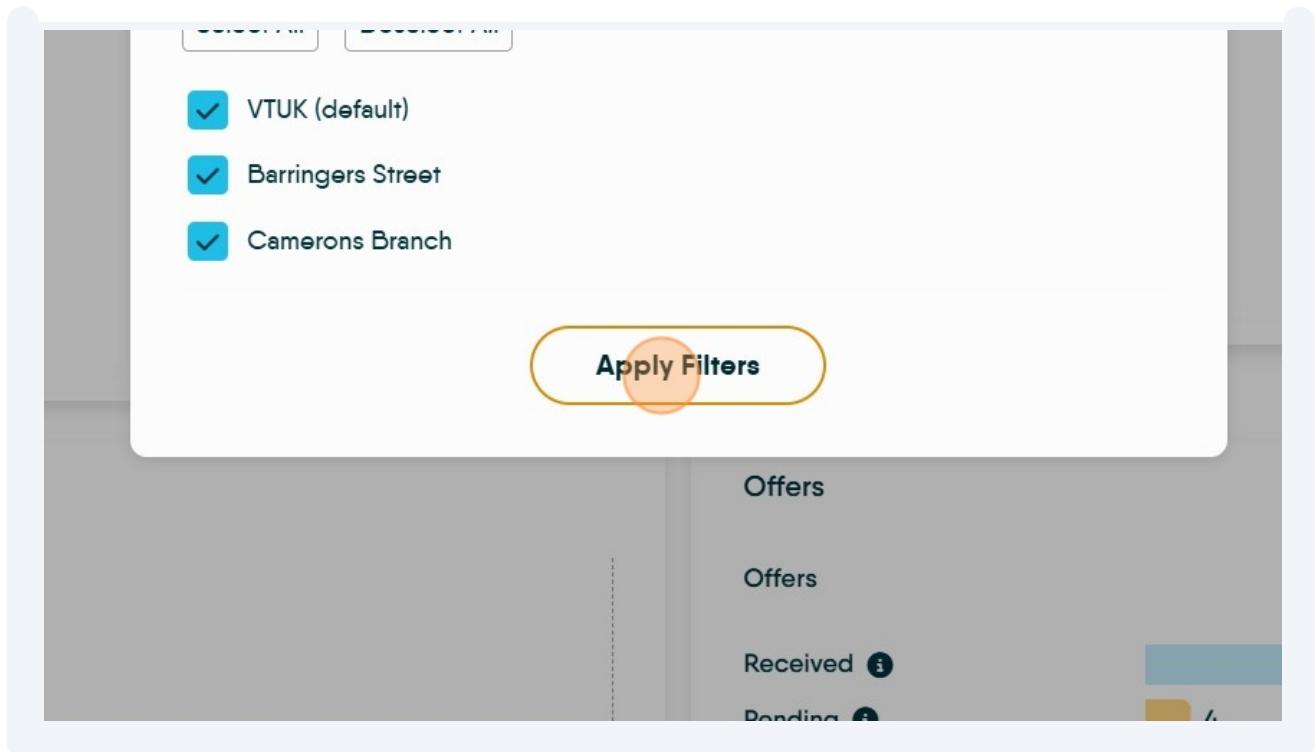
To change the date range, you can select one of the standard filters (*Month to Date, Previous 30 Days, Previous Month, This Year*) or select your own custom date range.



7

You can also select which branches you would like to view. Click "Apply filters" when you have selected your preferences.





8 You will see your new filters detailed at the top of the page.

Reporting

Sales Reporting Sales Pipeline

Applied filters: Date range: 01 Dec 2024 - 11 Dec 2024 Branch: VTUK (default) X Branch: Barringers Street X Branch: Camerons Branch X

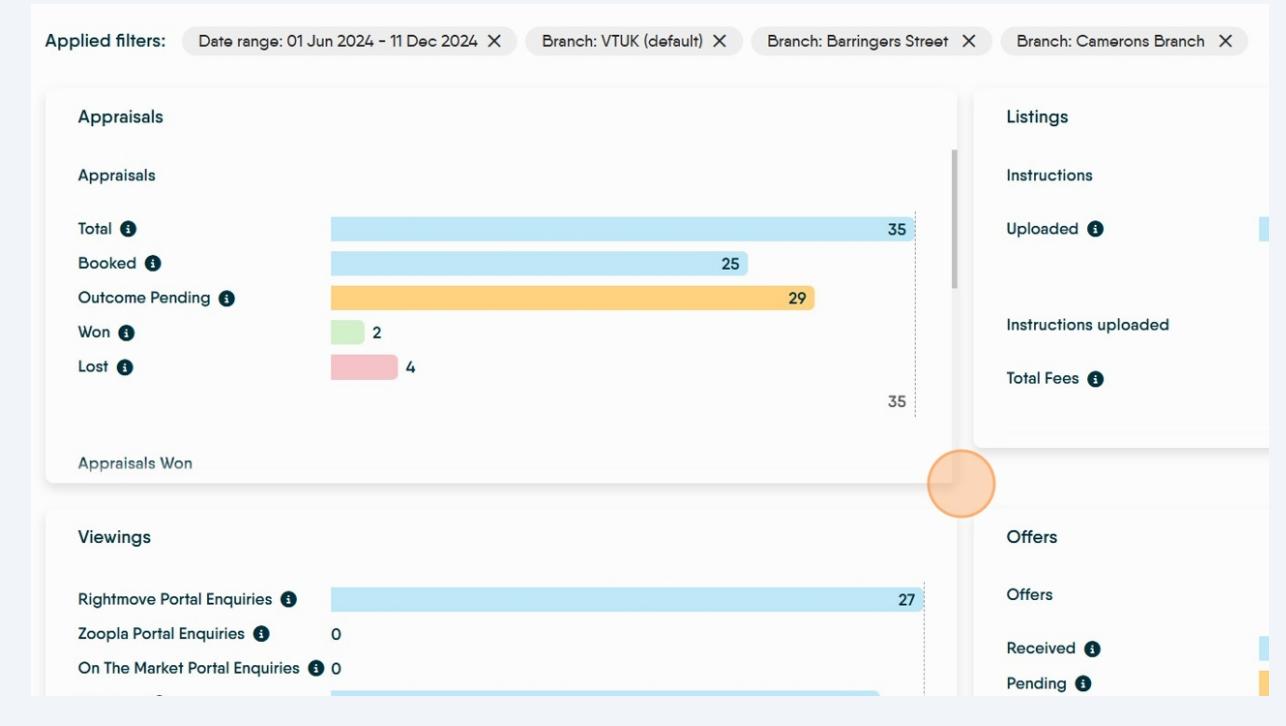
Appraisals

Category	Count
Total <small>i</small>	1
Booked <small>i</small>	1
Outcome Pending <small>i</small>	1
Won <small>i</small>	0

9

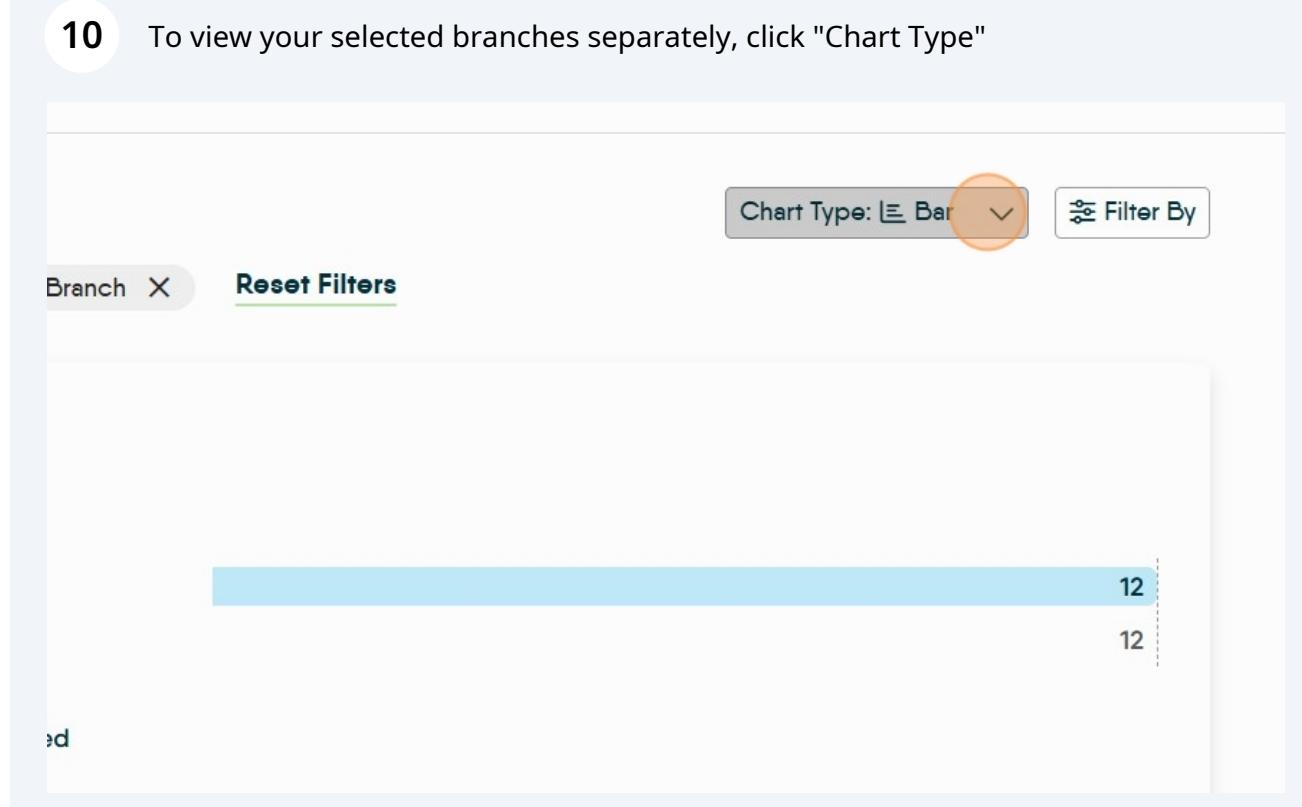
You will now be able to view the combined figures for all your selected branches within your selected date range.

If you are unsure of what any field shows, click the 'i' icon against the category title for more information.

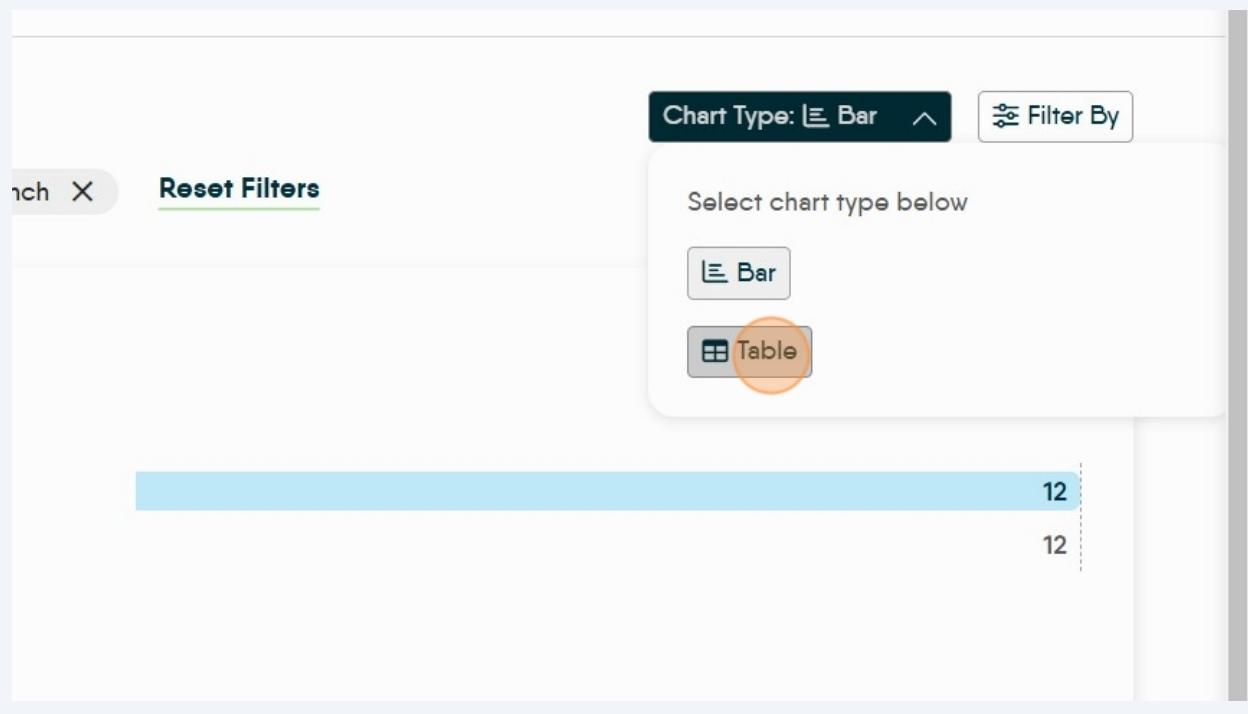


10

To view your selected branches separately, click "Chart Type"



11 Select the "Table" view

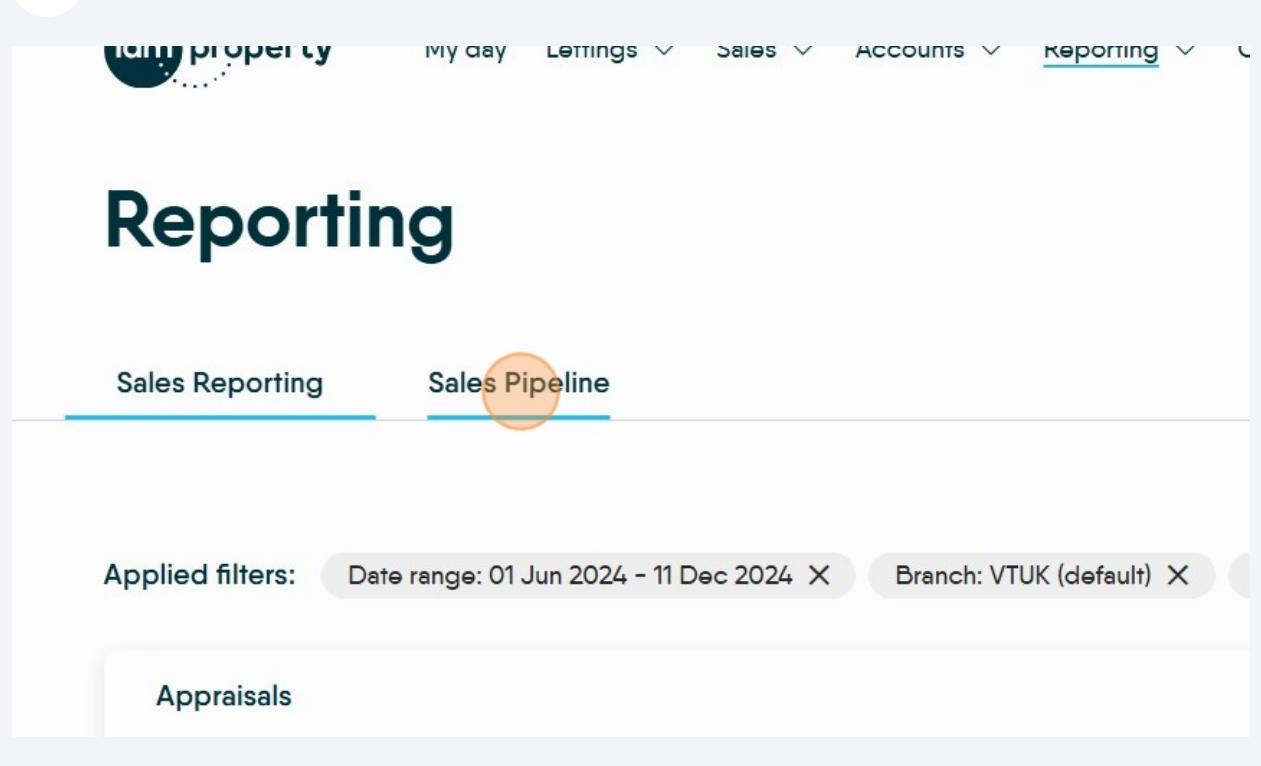


12 You will now see your reporting broken down by branch, in a table view.

Appraisals						
Branch	Total <small>i</small>	Booked <small>i</small>	Pending <small>i</small>	Won <small>i</small>	Lost <small>i</small>	Won - Marketing Price <small>i</small>
VTUK	33	23	27	2	4	£500,000.00
Barrings Street	2	2	2	0	0	£0.00
Camerons Branch	0	0	0	0	0	£0.00

Sales Pipeline Reporting

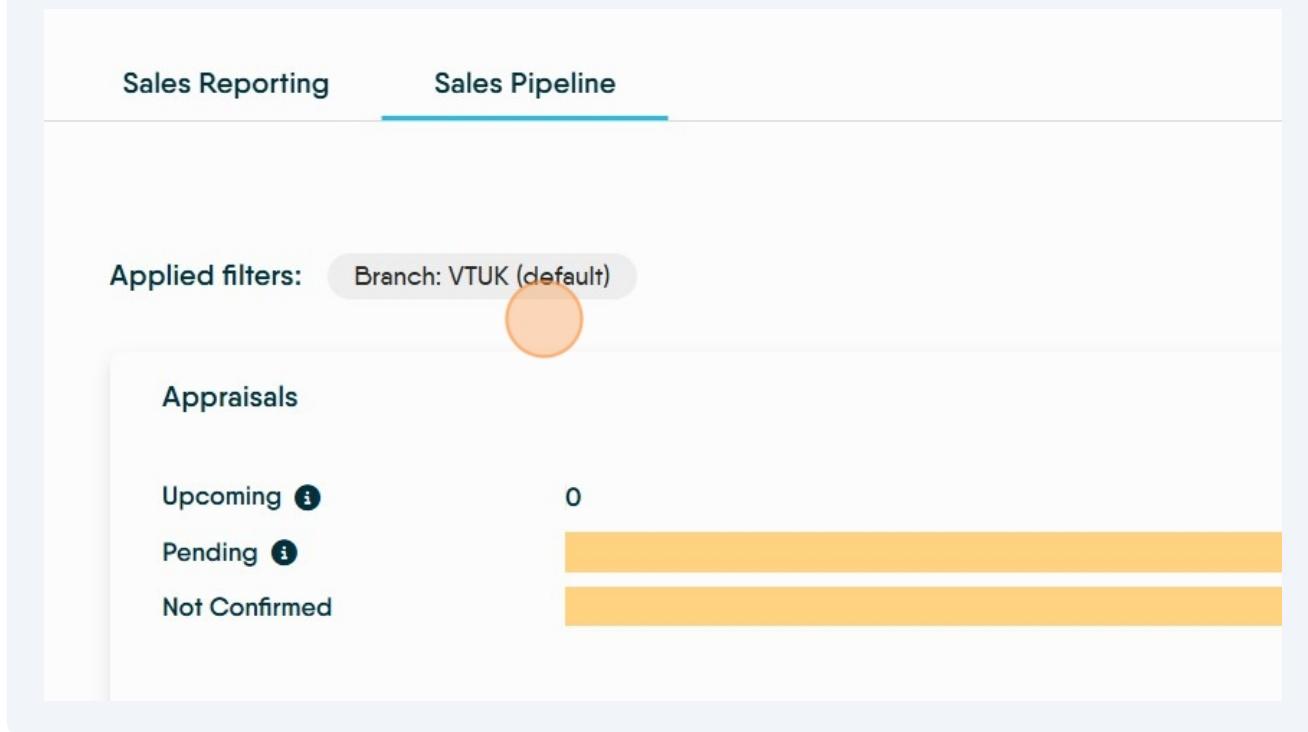
- 13 To view your Sales Pipeline, click the tab at the top of the page



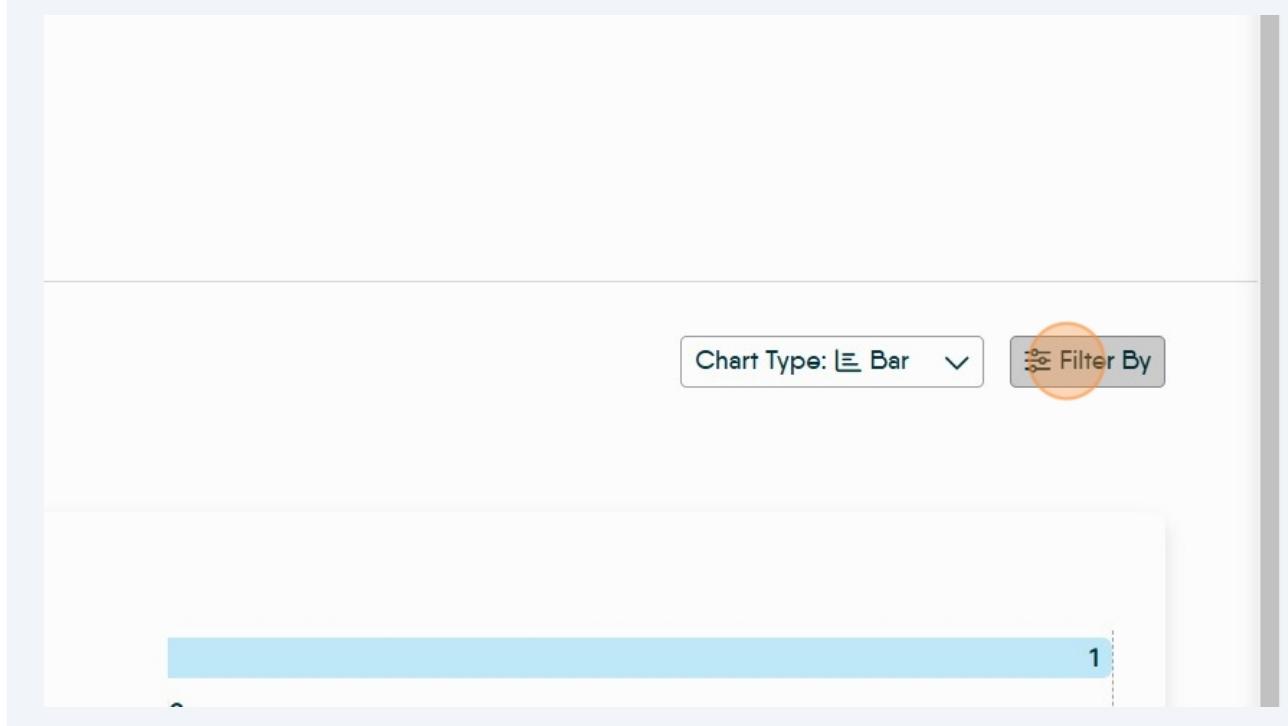
The screenshot shows the Tamu Property app interface. At the top, there is a navigation bar with tabs: 'My day', 'Lettings', 'Sales', 'Accounts', and 'Reporting'. The 'Reporting' tab is underlined, indicating it is the active tab. Below the navigation bar, the word 'Reporting' is displayed in a large, bold, dark teal font. Underneath this, there are two tabs: 'Sales Reporting' and 'Sales Pipeline'. The 'Sales Pipeline' tab is highlighted with a blue underline and a light orange circular callout. At the bottom of the screen, there is a section titled 'Applied filters:' with two buttons: 'Date range: 01 Jun 2024 - 11 Dec 2024' and 'Branch: VTUK (default)'. Below this, there is a button labeled 'Appraisals'.

14 By default, you will see only your user's branch.

Sales Pipeline does not have a date range and will show all upcoming figures.



15 To view more branches, click "Filter By" then select which branches you would like to view.
Click "Apply Filters"



Filter by

X

Branches

Select All

Deselect All

VTUK (default)

Barringers Street

Camerons Branch

Apply Filters

Select All

Deselect All

VTUK (default)

Barringers Street

Camerons Branch

Apply Filters

Completions

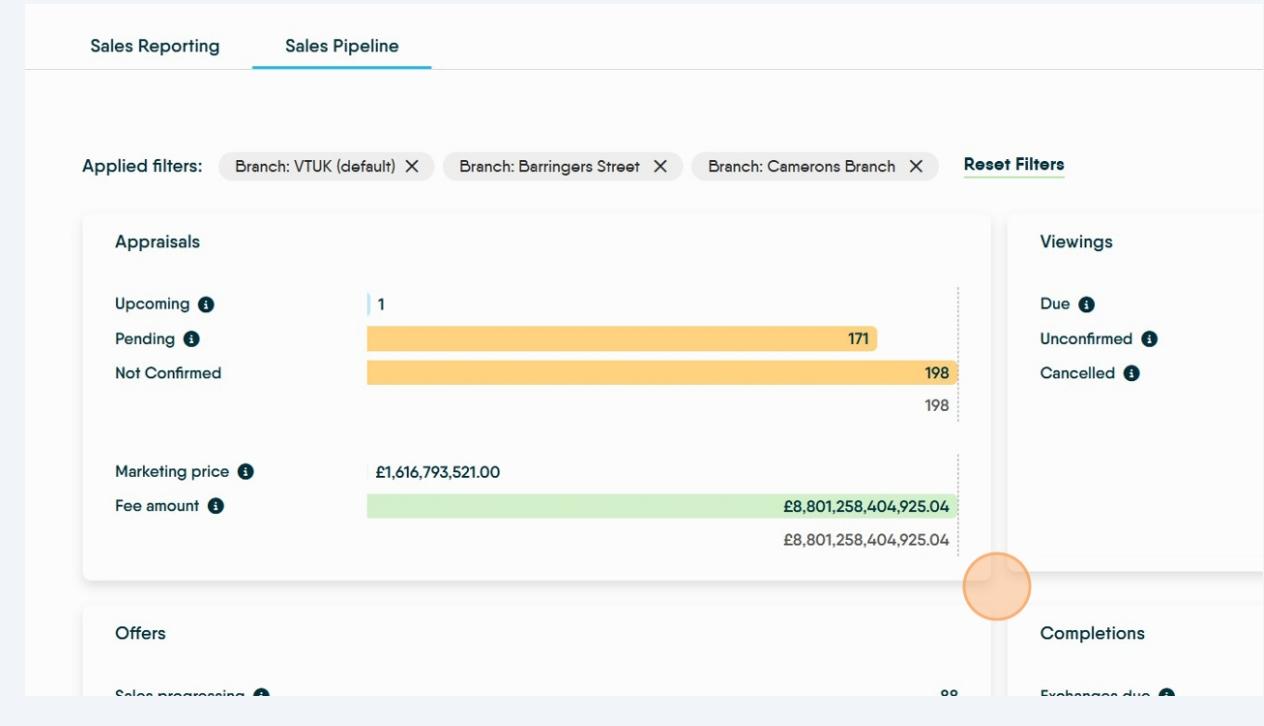
84

Exchanges due

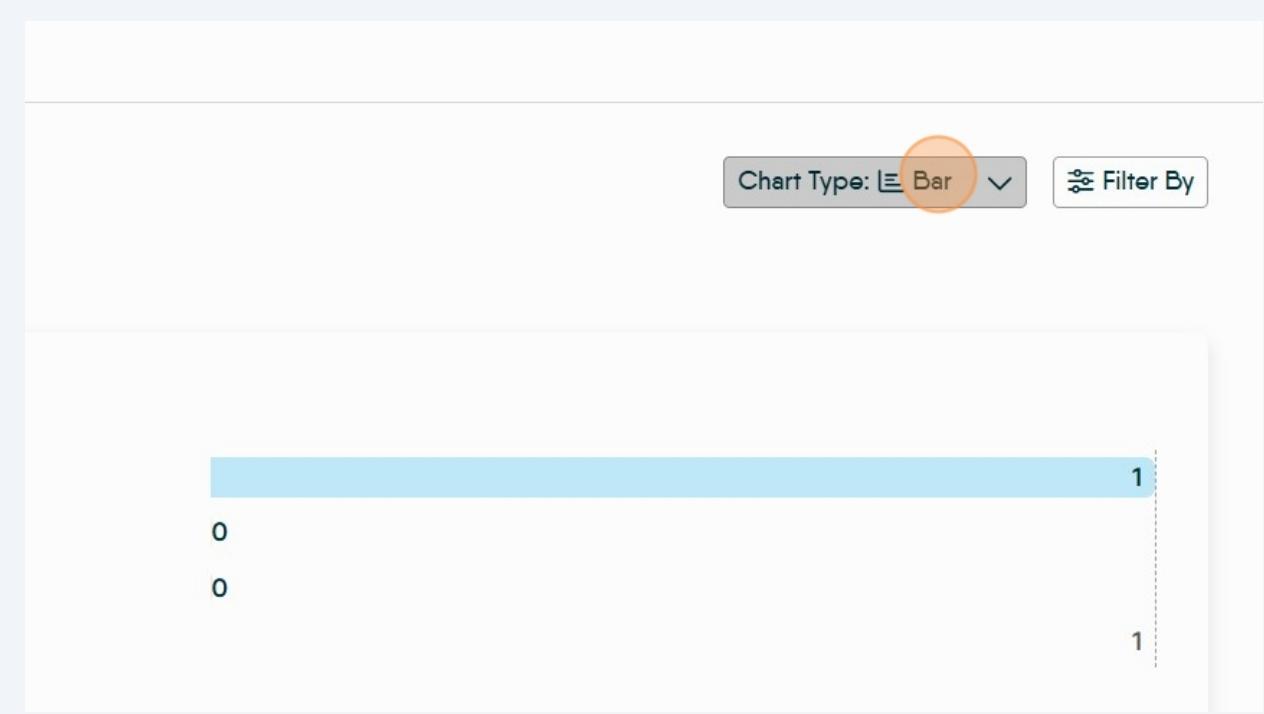
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16 You will now be able to view the combined figures for all your selected branches.

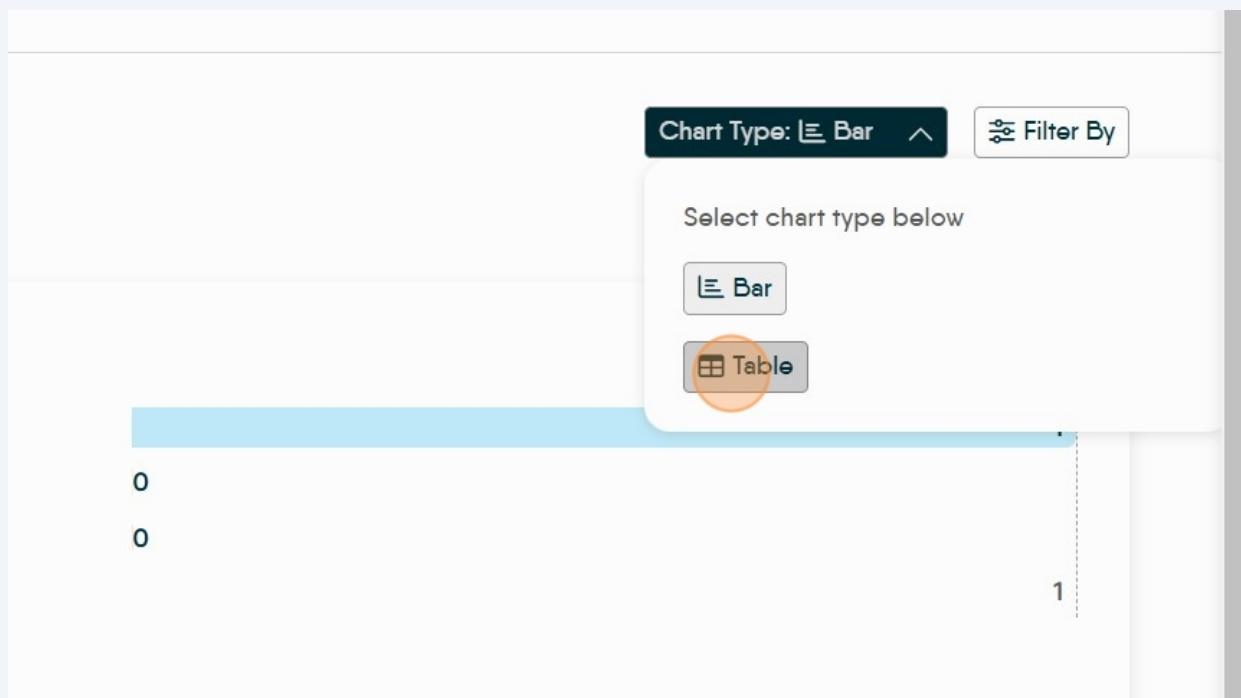
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17 To view your selected branches separately, click "Chart Type"



18 Select the "Table" view



19 You will now see your reporting broken down by branch, in a table view.

Sales Reporting Sales Pipeline

Applied filters: Branch: VTUK (default) X Branch: Barringers Street X Branch: Camerons Branch X [Reset Filters](#)

Appraisals

Branch	Appraisals Upcoming ⓘ	Appraisals Pending ⓘ	Appraisals Not Confirmed
VTUK	0	149	174
Barringers Street	0	11	12
Camerons Branch	1	11	12

Viewings

Branch	Viewings Due ⓘ	Viewings Unconfirmed ⓘ
VTUK	1	0