

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"



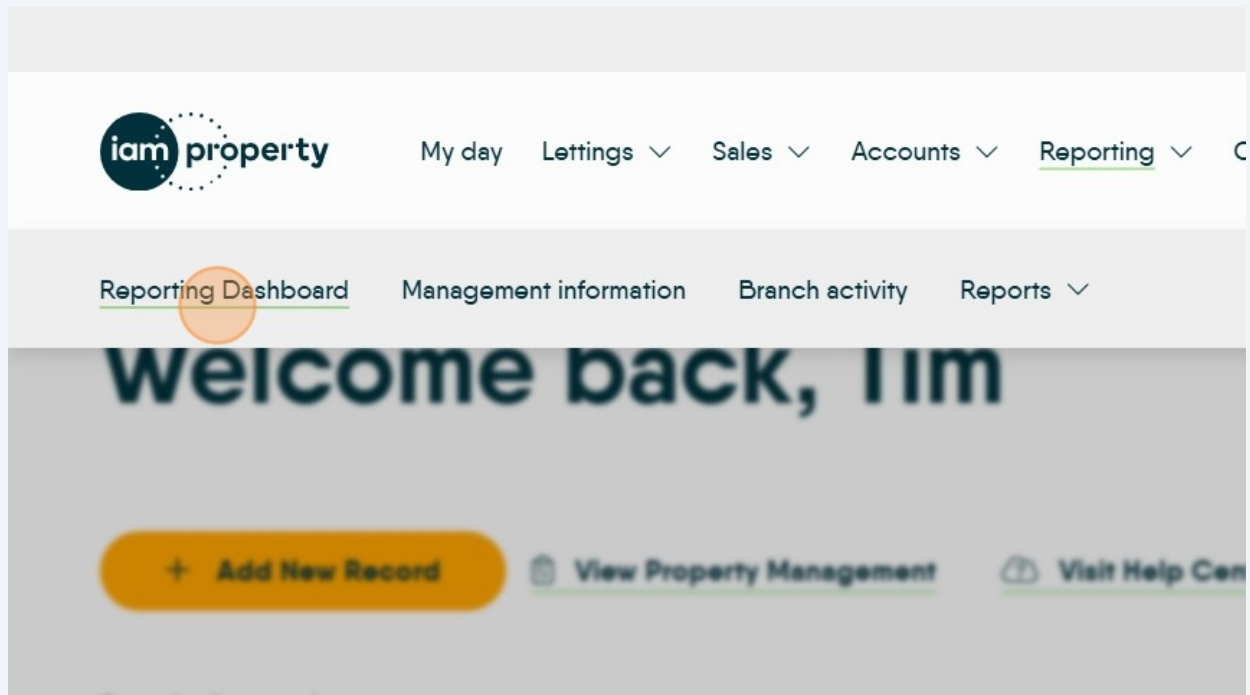
Settings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾

back, Tim

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- 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.

Reporting

Sales Reporting

Sales Pipeline

Applied filters:

Date range: 01 Dec 2024 - 11 Dec 2024

Branch: VTUK (default)

Appraisals

Appraisals

Total ⓘ

0

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

Chart Type: ☰ Bar ▼

⚙️ Filter By

3

3

6

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.

The screenshot shows a 'Filter by' dialog box with a close button (X) in the top right corner. Under the 'Date range' section, there are two date input fields: 'Start date' with the value '01/12/2024' and 'End date' with the value '11/12/2024'. Both fields have a calendar icon on the right. Below these fields are four buttons: 'Month To Date', 'Previous 30 Days', 'Previous Month', and 'This Year (Jan - Today)'. An orange circle highlights the 'Start date' field. Under the 'Branches' section, there are two buttons: 'Select All' and 'Deselect All'. Below these are two checkboxes: 'VTUK (default)' which is checked, and 'Barringers Street' which is unchecked.

7

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

This screenshot shows the same 'Filter by' dialog box as above, but with the 'Barringers Street' checkbox selected. The 'Start date' field is now highlighted with an orange circle. At the bottom of the dialog box is a large orange button labeled 'Apply Filters'.

- ☒ VTUK (default)
- ☒ Barringers Street
- ☒ Camerons Branch

Apply Filters

Offers

Offers

Received ⓘ

Pending ⓘ

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

Reporting

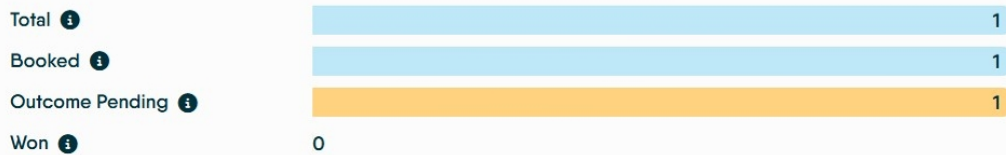
Sales Reporting

Sales Pipeline

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

Appraisals

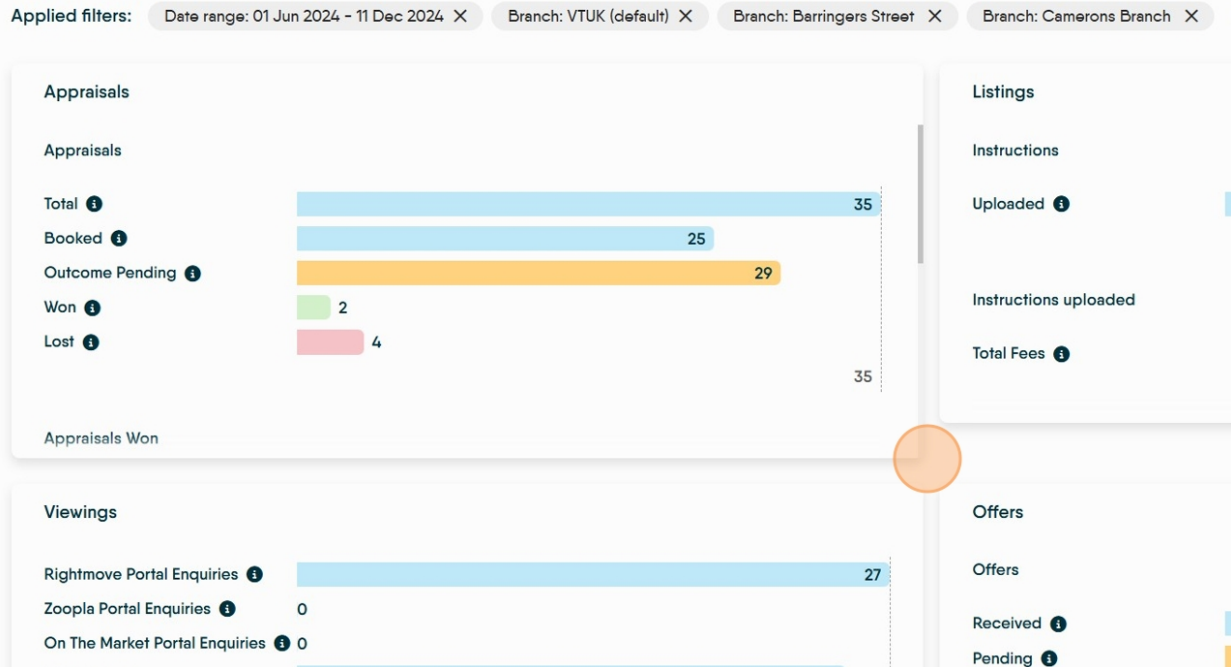
Appraisals



9

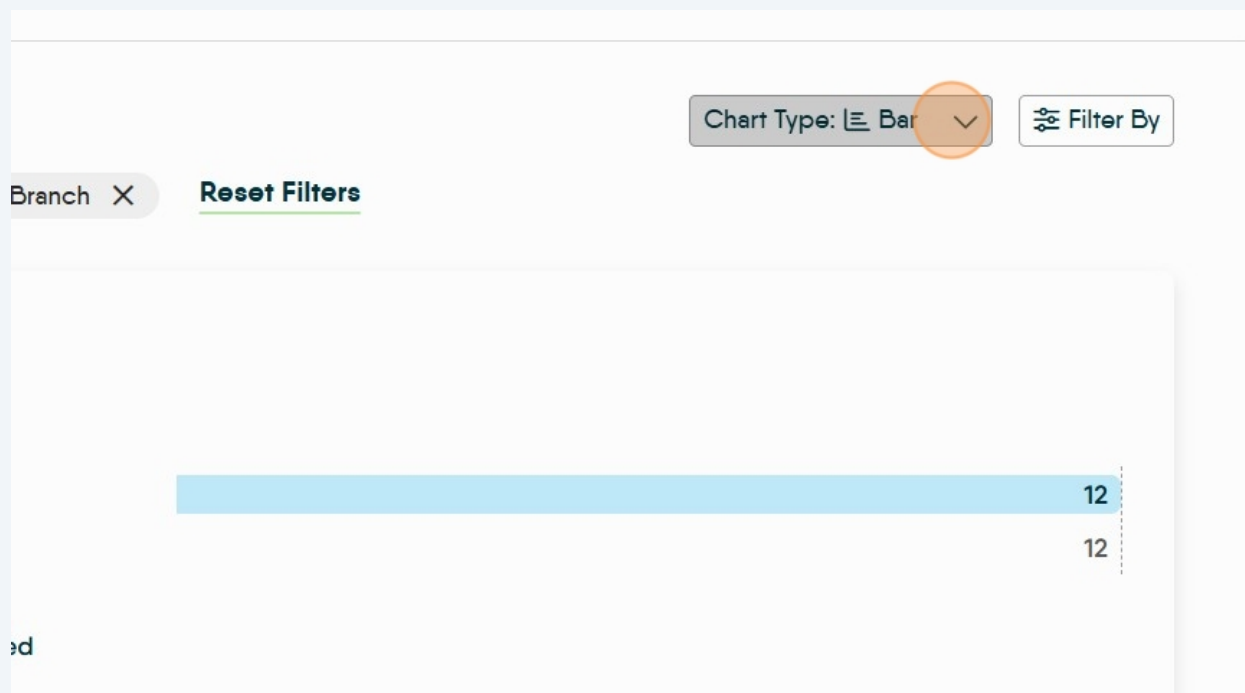
You will now be able to view the combined figures for all your selected branches within your selected date range.

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

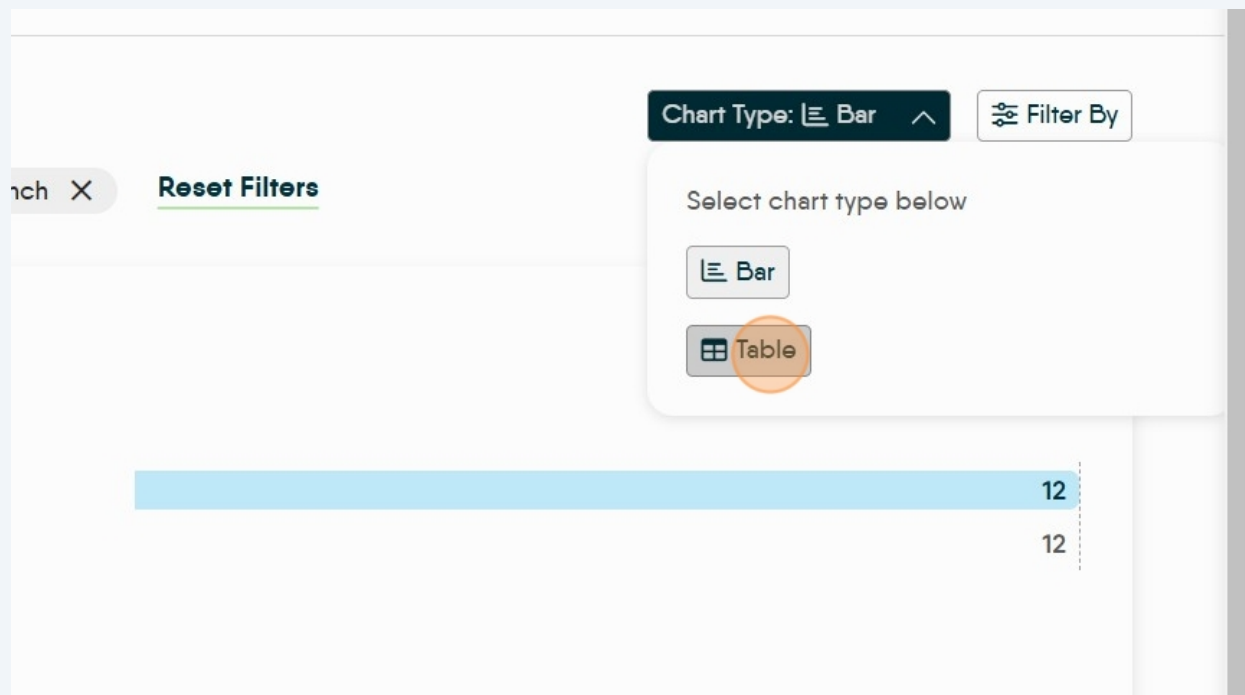


10

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.

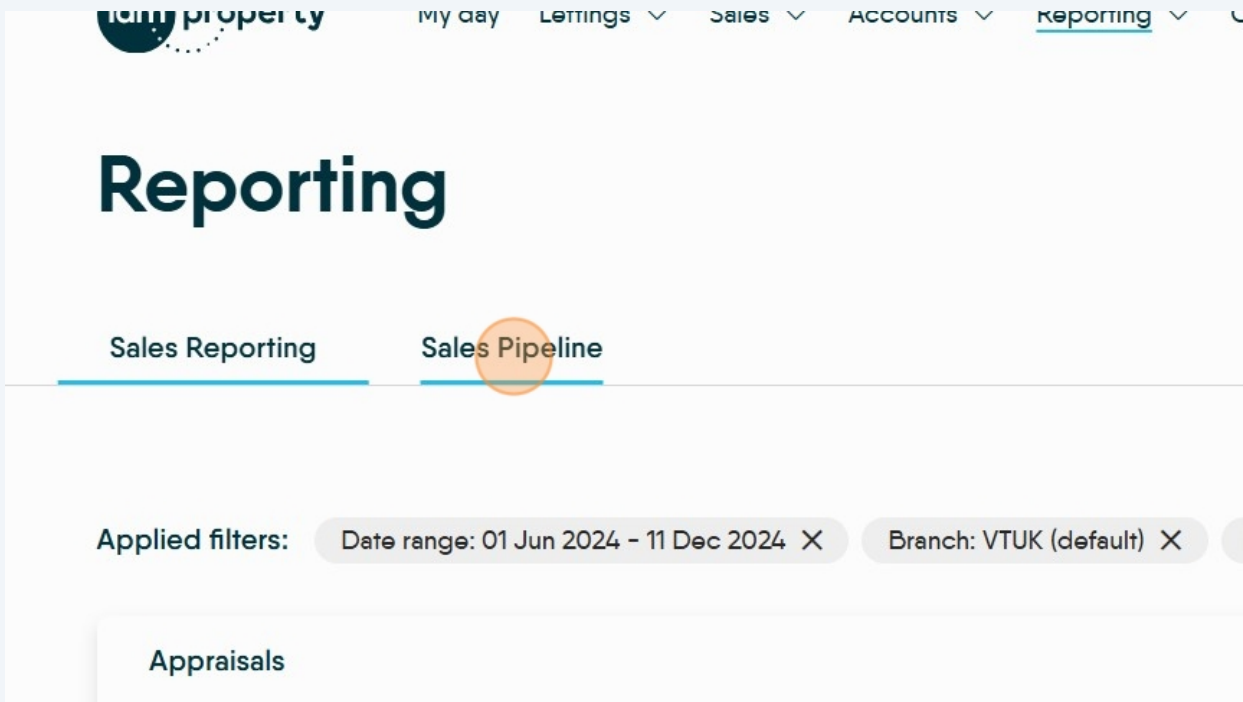
Applied filters: Date range: 01 Jun 2024 - 11 Dec 2024 X Branch: VTUK (default) X Branch: Barringers S

Appraisals

Branch	Total ⁱ	Booked ⁱ	Pending ⁱ	Won ⁱ	Lost ⁱ	Won - Marketing Price ⁱ
VTUK	33	23	27	2	4	£500,000.00
Barringers Street	2	2	2	0	0	£0.00
Camerons Branch	0	0	0	0	0	£0.00

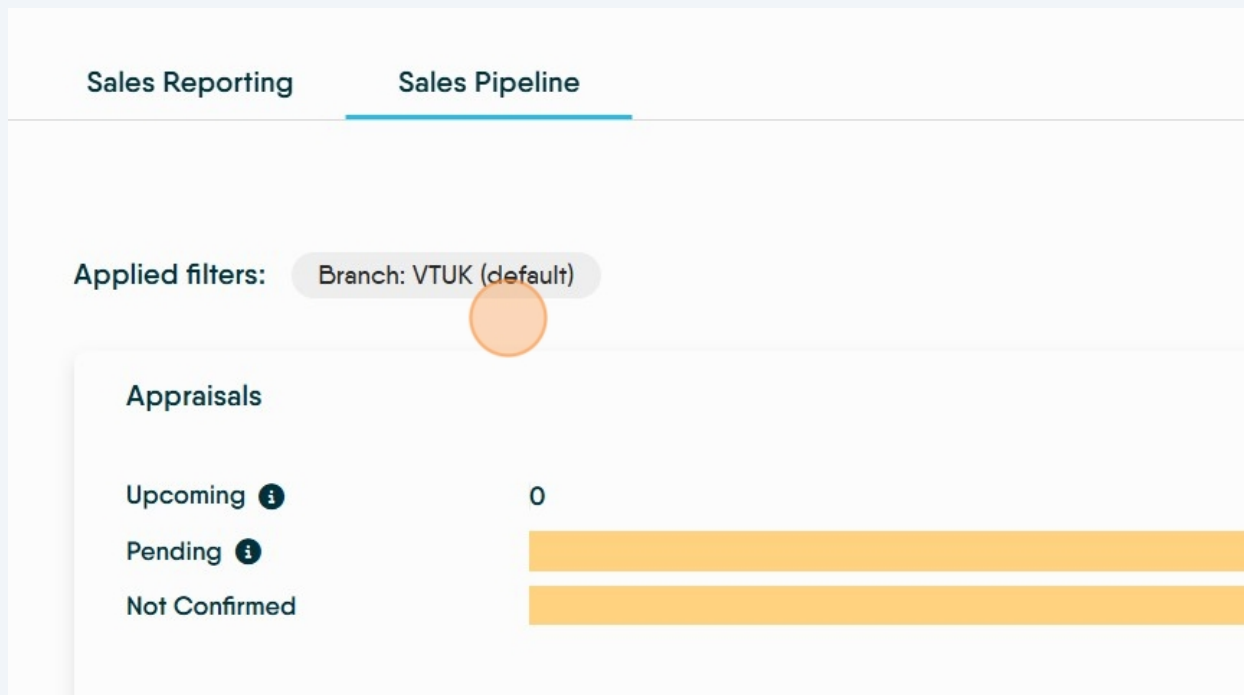
Sales Pipeline Reporting

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

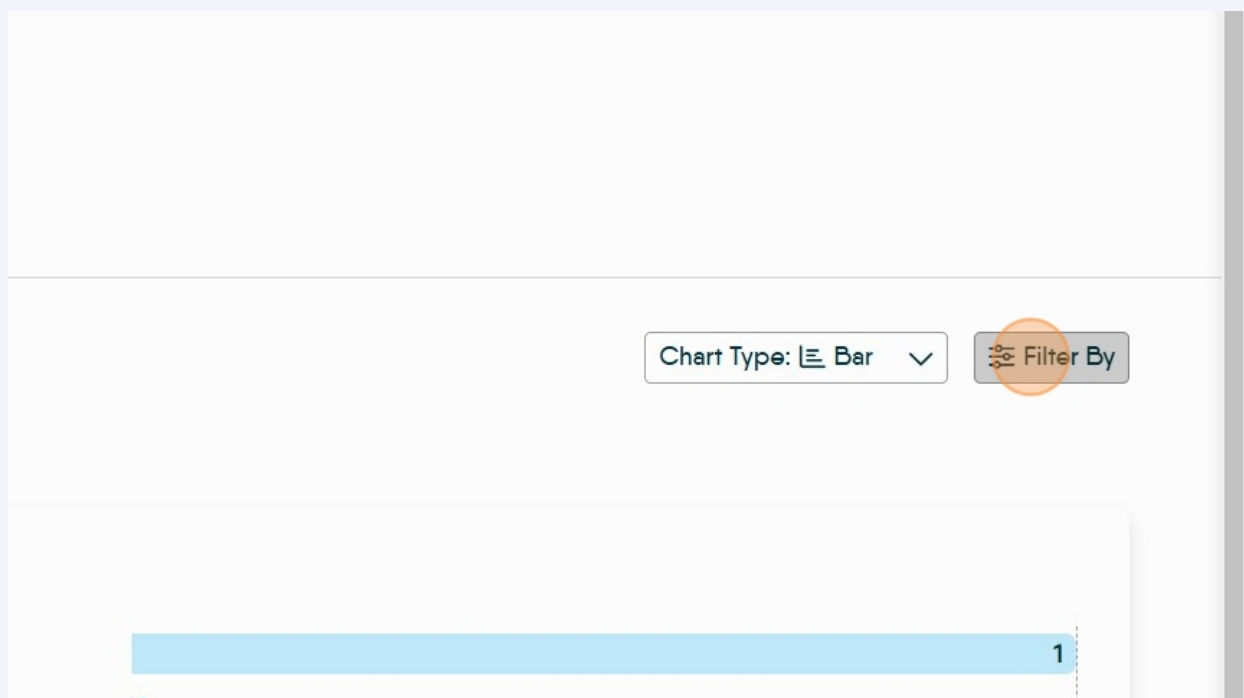


- 14 By default, you will see only your user's branch.

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



Branches

Select All

Deselect All

- ☒ VTUK (default)
- ☐ Barringers Street
- ☐ Camerons Branch

Apply Filters

Select All

Deselect All

- ☒ VTUK (default)
- ☒ Barringers Street
- ☒ Camerons Branch

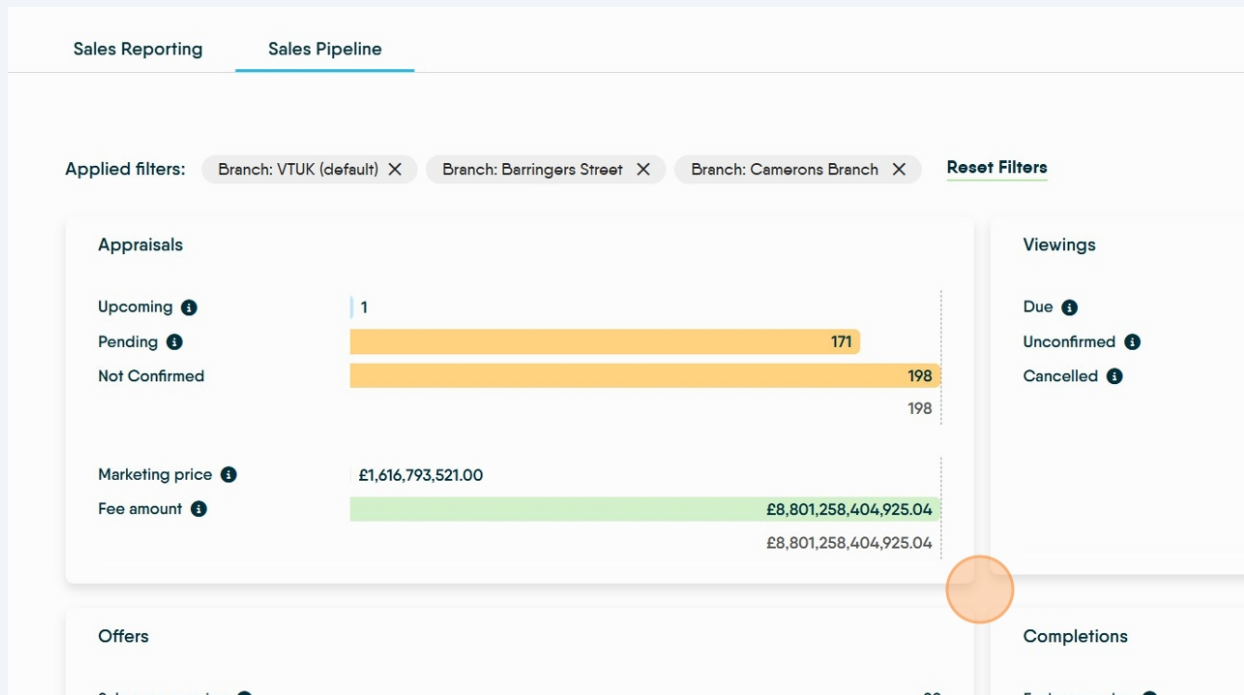
Apply Filters

Completions

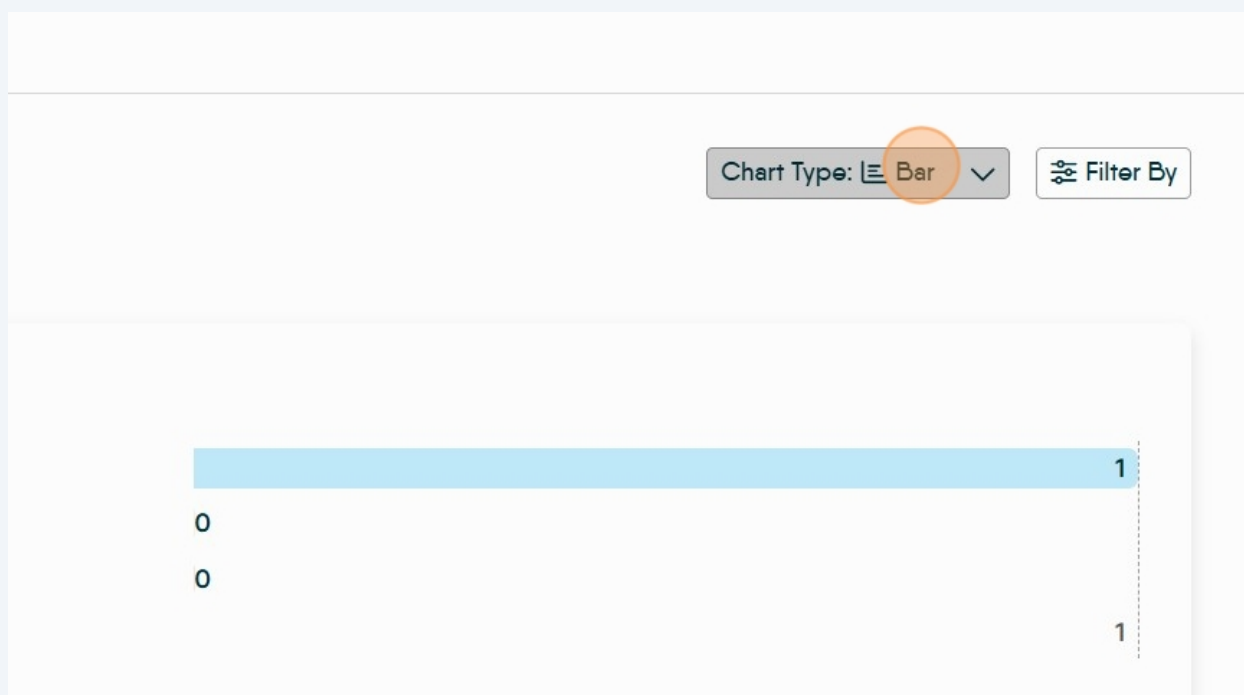
Exchanges due

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

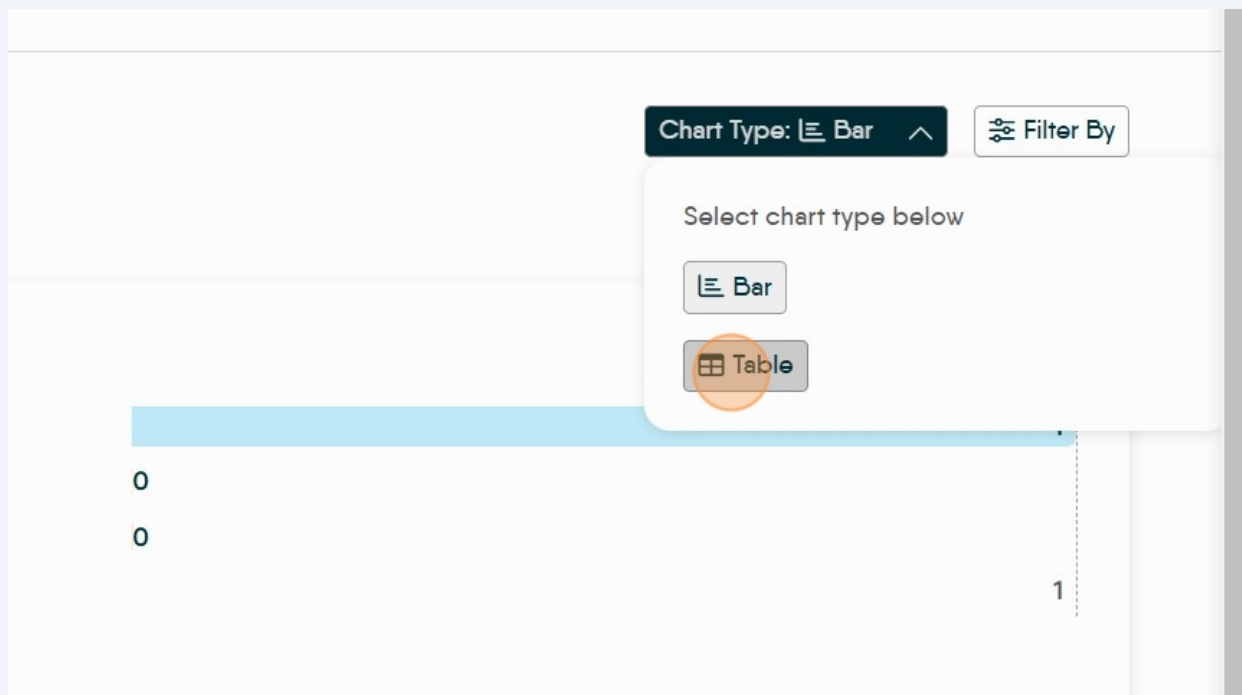
If you are unsure of what any field shows, click the 'i' icon against the category title for more information.



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