

Navigating Dynamic Agent - Performance Dashboard



Learn how to effectively navigate the Dynamic Agent Performance Dashboard, to access comprehensive company wide performance metrics. This screen gives a complete overview of the performance of a Company, Branch or individual performance depending on permissions granted to the user.

This guide helps users quickly locate branch standings, individual team member KPIs, and monthly target tracking data.

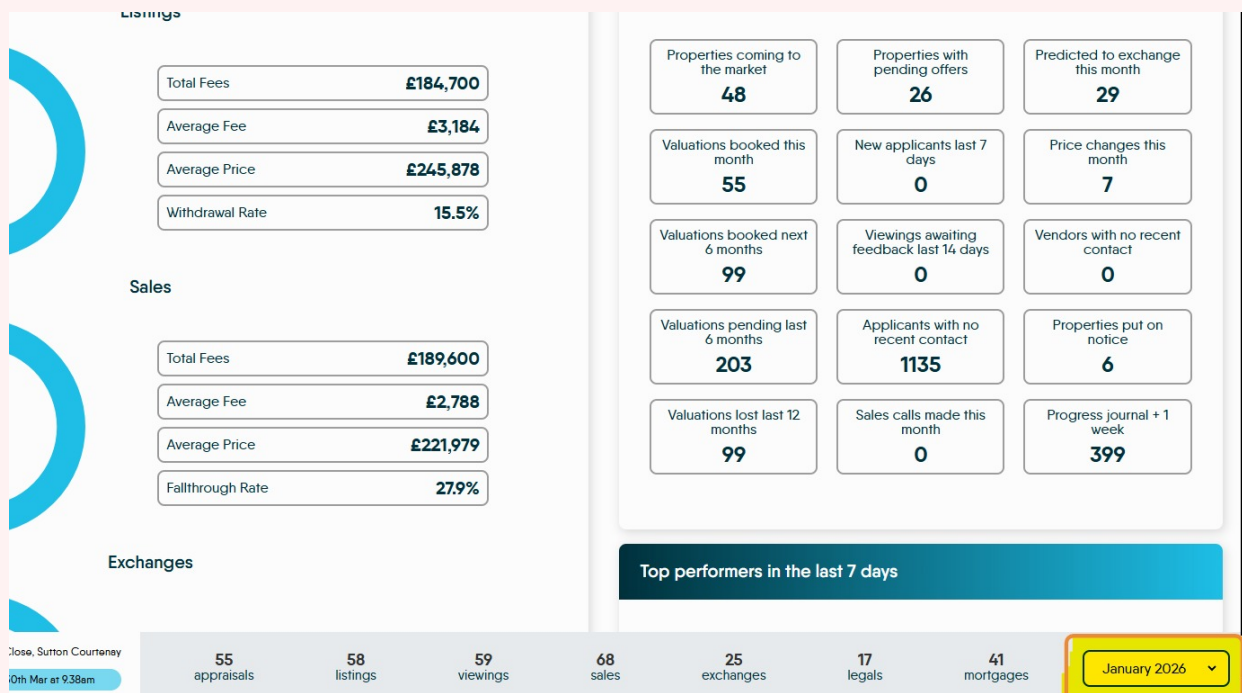
Dynamic Agent Dashboard Overview

- 1 Navigate to <https://dynamic-agent.co.uk/> log in using the details provided.



Alert! All the data on this screen is controlled by the settings created for your designated job role and the **Month** option selected at the bottom right of the screen.

This document is showing the screens available for a user with **full** access to Dynamic Agent.



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The **Dynamic Agent Dashboard**, this is the first screen that you will see and shows all the key data to help manage your own, your branch or company performance.

There are various tiles showing information based on your user setup and (by default) is the current months data.

All of the date based information shown in these screens is controlled by the date option (bottom right) this is selected at the bottom of the screen (highlighted).

Throughout this guide we will look at each of the screens individually.

The image displays two screenshots of the Dynamic Agent Dashboard. The top screenshot shows a summary of key performance indicators (KPIs) for a specific agent. On the left, there are four summary cards: Total Fees (£432,500), Average Fee (£3,228), Average Price (£256,011), and Fallthrough Rate (11.2%). On the right, there is a grid of nine KPI tiles: Valuations booked next 6 months (99), Viewings awaiting feedback last 14 days (0), Vendors with no recent contact (0), Valuations pending last 6 months (203), Applicants with no recent contact (1135), Properties put on notice (6), Valuations lost last 12 months (99), Sales calls made this month (0), and Progress journal + 1 week (399). Below this grid is a section for 'Top performers in the last 7 days'. At the bottom, there is a navigation bar with a date dropdown menu set to 'May 2026'. The bottom screenshot shows a similar dashboard for another agent. The left summary cards are: Total Fees (£275,300), Average Fee (£3,128), Average Price (£250,368), and Fallthrough Rate (11.4%). The right KPI grid shows: booked this month (180), last 7 days (0), month (0), Valuations booked next 6 months (99), Viewings awaiting feedback last 14 days (0), Valuations lost last 12 months (99), Applicants with no recent contact (1365), and a date range dropdown menu. The bottom navigation bar shows a date dropdown menu set to 'March 2026'.

Category	Value
Total Fees	£432,500
Average Fee	£3,228
Average Price	£256,011
Fallthrough Rate	11.2%

Metric	Value
Valuations booked next 6 months	99
Viewings awaiting feedback last 14 days	0
Vendors with no recent contact	0
Valuations pending last 6 months	203
Applicants with no recent contact	1135
Properties put on notice	6
Valuations lost last 12 months	99
Sales calls made this month	0
Progress journal + 1 week	399

Category	Value
Total Fees	£0

Metric	Value
listings	0
sales	134
exchanges	0
legals	0
mortgages	0

Category	Value
Total Fees	£275,300
Average Fee	£3,128
Average Price	£250,368
Fallthrough Rate	11.4%

Metric	Value
booked this month	180
last 7 days	0
month	0
Valuations booked next 6 months	99
Viewings awaiting feedback last 14 days	0
Valuations lost last 12 months	99
Applicants with no recent contact	1365

Category	Value
Total Fees	£268,500

Metric	Value
listings	291
sales	88
exchanges	86
legals	93
mortgages	91



All the data and screens shown in this guide are based on a user having **'Full'** access to Dynamic Agent (e.g. a Director/Owner/Administrator), if the user is setup as a Negotiator they may see less data or data for their branch only.

Overall Companywide Standings

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This screen has a large amount of information on it, in the following section we will look at each screen individually. As mentioned previously, each of these screens are personalised by the user settings and may only show you your branch data

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"Overall Company wide Standings" This shows the information for Listings, Sales, Exchanges, Legals, Mortgages.

For Listings, Sales and Exchanges, Gross (total for Exchanges), Net and Target are shown in the roundel and Total Fees, Average Fee, Average Price and Withdrawal Rate (for Listings and Sales) are shown in the individual boxes.

For 'Legals' and 'Mortgages' total and target are shown. Below this is a menu to access the 'Activity Panel' (for more info on this click [here](#)) allowing more detail to be added to the data on screen.

These are fixed data screens and the information displayed is based on the date set at the bottom of the screen and any specific User settings that restrict access to information.

Dynamic Agent

- Dashboard
- ActivityPanel
- Branches >
- Commission >
- Operations >
- Add... >

Overall Companywide Standings

Listings

Gross	0
Net	-13
Target	42

Total Fees	£0
Average Fee	£0
Average Price	£0
Withdrawal Rate	100%

Sales

Gross	134
Net	119
Target	48

Total Fees	£432,500
Average Fee	£3,228
Average Price	£256,011
Fallthrough Rate	11.2%

Exchanges

Total	0
Target	32

Total Fees	£0
Average Fee	£0
Average Price	£0

LEGALS

Total	0
Target	60

MORTGAGES

Total	0
Target	18

Companywide | Activity Panel >

Key metrics at-a-glance

- Properties coming to the market: **48**
- Valuations booked this month: **7**
- Valuations booked 6 months: **99**
- Valuations pending 6 months: **203**
- Valuations lost in 6 months: **99**

Top performers

- 1 Scarlett Stone: 4 net sales, 0 points
- 1 Ruby Yates: -1 net listings, 0 points

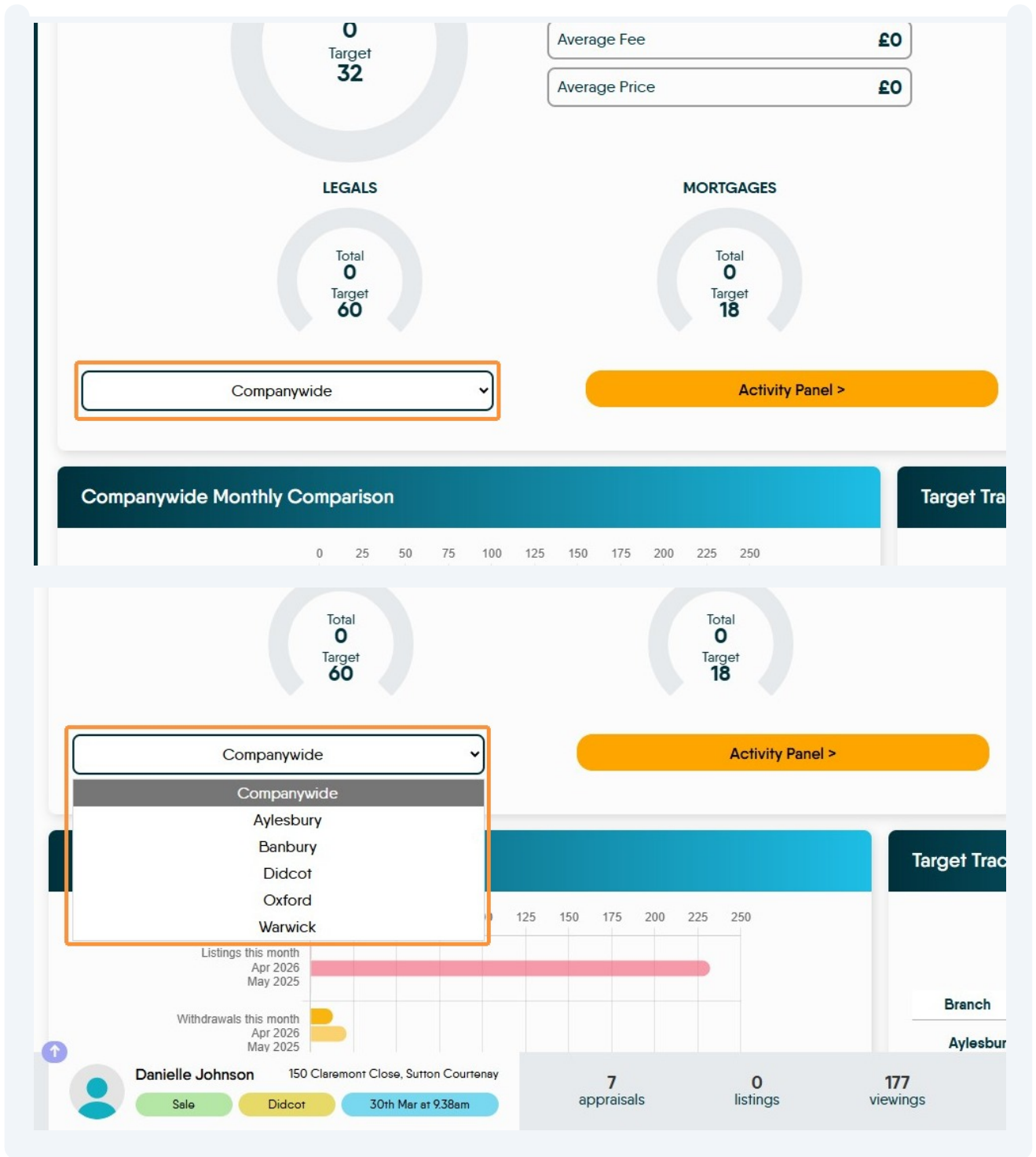
Companywide Monthly Comparison

Listings this month: Apr 2026 (225), May 2025 (225)

Target Tracker

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To further filter the data clicking this drop down menu will allow you to select the data for a specific branch to review.



Key metrics at-a-glance

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"Key metrics at-a-glance" provides a suite of clickable options that can drill down into the key metrics for your branch or company.

Each of these tiles is 'clickable' and will, when clicked, take you to the related screen in the 'Activity Panel'. For example, selecting the 'Properties Coming to the market' option will take you to the CTM screen in the Activity Panel.

These options are also available via the 'Activity Panel' option in the left menu.

The screenshot displays a dashboard interface with a top navigation bar containing links for iamproperty, crm, movebutler, iamsold, and dynamicagent. The main content is divided into three sections: Listings, Sales, and Exchanges. The 'Key metrics at-a-glance' panel is highlighted with an orange border and contains 12 data tiles. The 'Listings' section shows metrics for Total Fees, Average Fee, Average Price, and Withdrawal Rate. The 'Sales' section shows metrics for Total Fees, Average Fee, Average Price, and Fallthrough Rate. The 'Exchanges' section is partially visible at the bottom.

Category	Metric	Value
Listings	Total Fees	£0
	Average Fee	£0
	Average Price	£0
	Withdrawal Rate	100%
Sales	Total Fees	£432,500
	Average Fee	£3,228
	Average Price	£256,011
	Fallthrough Rate	11.2%

Key metrics at-a-glance		
Properties coming to the market	Properties with pending offers	Predicted to exchange this month
48	26	41
Valuations booked this month	New applicants last 7 days	Price changes this month
7	0	0
Valuations booked next 6 months	Viewings awaiting feedback last 14 days	Vendors with no recent contact
99	0	0
Valuations pending last 6 months	Applicants with no recent contact	Properties put on notice
203	1135	6
Valuations lost last 12 months	Sales calls made this month	Progress journal + 1 week
99	0	399

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For example, once the option is selected you will be taken to the **Once** in the **CTM** screen. Use the drop-down menus to filter results by Branch, Valuer, or Negotiator.

The **'Coming to Market'** screen shows you properties that are coming to market, at the top of the screen the totals for Total Fees, Total Asking Price, Average Instruction fees and Average Asking Price are shown.

The Expected Date is shown to the left of the screen. Also shown is address, Property Type, Price, Fee etc.

The screenshot shows the 'Coming to Market' interface. At the top, there are summary statistics: 48 properties coming to market, Total Fees of £136,300.00, Total Asking Prices of £10,915,000, Average Instruction Fee of £2,839.58, and Average Asking Price of £227,396. Below this, there are filter dropdowns for Branch, Valuer, and Negotiator, all set to 'Show all'. A search bar is also present. The main table lists 8 properties with columns for No, Expected Date, Address, Type, Price, Fee, Valuer, Key Contact, Viewings, and Branch. Each row has a '+ Actions' button. At the bottom, there is a navigation bar with various metrics: 7 appraisals, 0 listings, 177 viewings, 134 sales, 0 exchanges, 0 legals, and 0 mortgages. A date selector is set to May 2026.

No	Expected Date	Address	Type	Price	Fee	Valuer	Key Contact	Viewings	Branch
1	Ordered	46 Charter Close, Aylesbury, HP20 0VX	2 bed detached house	£207,500	£2,600	Edward D	Amelia J	0	AYL
2	Ordered	59 Radford Close, Bishopstone, HP17 7AY	3 bed detached house	£225,000	£2,900	Edward D	Jasmine W	0	AYL
3	Ordered	8 Shannon Close, Walton Court, HP21 8PQ	3 bed semi-detached house	£122,500	£1,900	Kyle W	Scarlett S	0	AYL
4	Ordered	12 Lovers Lane, Grimsbury, OX16 6HT	3 bed bungalow	£245,000	£2,900	William P	Michael W	0	BAN
5	Ordered	154 Rocks Lane, Heathcote, CV34 4JN	4 bed semi-detached house	£177,500	£1,800	Ruby Y	Alfie B	0	WAR
6	Ordered	67 Carlton Road, Middleton Cheney, OX17 7AC	2 bed detached house	£157,500	£1,900	William P	Michael W	0	BAN
7	Ordered	20 Newcastle Close, Adderbury, OX17 2KQ	4 bed bungalow	£300,000	£3,000	William P	Michael W	0	BAN
8	Ordered	101 St Helen's Street, Little Wittenham, OX14 5AY	4 bed semi-detached house	£202,500	£2,400	Zoe R	Grace W	0	DID

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Click **"Actions."** this allows access to other details in CRM via the orange buttons, as well as the ability to change the valuer and negotiator records.

Expected Date	Address	Type	Price	Fee	Valuer	Key Contact	Viewings	Branch	
									<div style="display: flex; justify-content: space-between; align-items: center;"> <div> CRM - Details CRM - Marketing CRM - Media CRM - Viewings CRM - Journal </div> <div> Change valuer Change negotiator </div> <div> Edward ▼ Amelia ▼ </div> <div> Hide </div> </div>
Ordered	59 Radford Close, Bishopstone, HP17 7AY	3 bed detached house	£225,000	£2,900	Edward D	Jasmine W	0	AYL	+ Actions
Ordered	8 Shannon Close, Walton Court, HP21 8PQ	3 bed semi-detached house	£122,500	£1,900	Kyle W	Scarlett S	0	AYL	+ Actions
Ordered	12 Lovers Lane, Grimsbury, OX16 6HT	3 bed bungalow	£245,000	£2,900	William P	Michael W	0	BAN	+ Actions
Ordered	154 Rocks Lane, Heathcote, CV34 4JN	4 bed semi-detached house	£177,500	£1,800	Ruby Y	Alfie B	0	WAR	+ Actions
Ordered	67 Carlton Road, Middleton Cheney, OX17 7AC	2 bed detached house	£157,500	£1,900	William P	Michael W	0	BAN	+ Actions
Ordered	20 Newcastle Close, Adderbury, OX17 2KQ	4 bed bungalow	£300,000	£3,000	William P	Michael W	0	BAN	+ Actions
Ordered	101 St Helen's Street, Little Wittenham, OX14 5AY	4 bed semi-detached house	£202,500	£2,400	Zoe R	Grace W	0	DID	+ Actions
Ordered	172 Longwood Road, Milton Park, OX14 1UU	2 bed detached house	£322,500	£4,600	Zoe R	Grace W	0	DID	+ Actions

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Click the **Dashboard** icon to return to the dashboard screen.

Activity Panel

- Dashboard 0
- CTM 48
- Sales 134
- Offers 26
- Exchanges 0
- Legals 0
- Mortgages 0
- Sold STC 399
- For Sale 544
- Auction 0
- Applicants 1365
- Canx 15
- Withdrawals 13
- On Notice 6
- New Prices 0
- Val Appts 35
- Vals Booked 7
- Viewings 0

Listings
0

Total Listing Fees
£0.00

Total Asking Prices
£0

Average

Listings: 1st May 2026 – 31st May 2026

Branch

Valuer

Negotiator

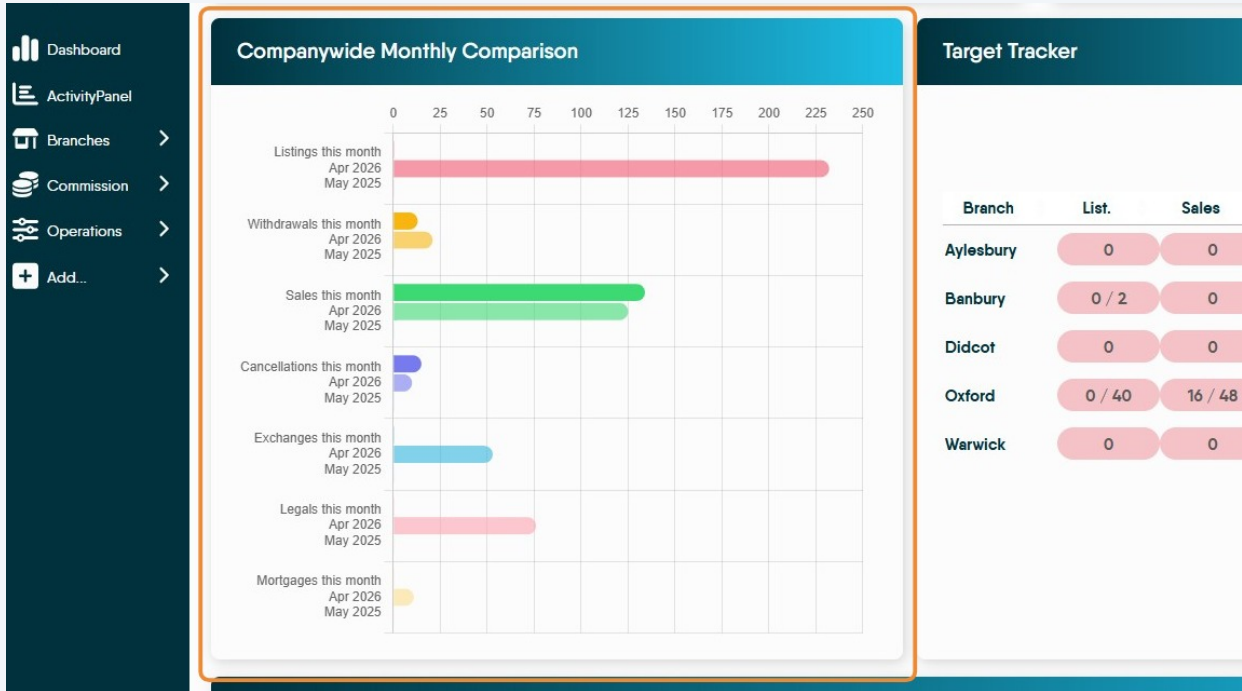
Disposal

Search

No	Date	Address	Valuer	Negotiator	Price
No data.					

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"**Companywide Monthly Comparison**" to review the whole company performance over this month and the previous month last year e.g. April 2026 v May 2025.



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Click "**Target Tracker**" to view the Branch performance against targets and in relation to other branches in the company. If a target is hit the it will be coloured green, if still in progress it will be coloured Orange

Branch	List.	Sales	Exch.	Lgls.	Mo
Aylesbury	74 / 30	22 / 325	18 / 25	20 / 15	21
Banbury	48 / 35	17 / 25	19 / 15	17 / 15	15
Didcot	0	0	0	0	
Oxford	0	0	0	0	
Warwick	0	0	0	0	

League Tables

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Across the bottom of the screen is a **"League Tables"** section to view performance rankings for Negotiators, Valuers, Sales Progressors and Branches this is dependent on setup and User config.

For each of these league tables the column headers can be selected to sort the column by ascending or descending order. N.B. the information displayed is still controlled by the 'Date' filter in the bottom right corner of the screen.

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The **'Negotiators'** tab shows all Negotiators in a league table against their colleagues, using 9 different metrics that can be used to rate performance.

League Tables										
Negotiators										
Pos	Name	Net Sales	Canx	Gross Sold	Net Listings	Withd.	Gross Listed	Legals	Mort.	Points
1	Alexander Lambert Oxford	4	1	5	4	0	4	2	1	0
2	Alfie Banks Warwick	5	0	5	11	1	12	1	0	0
3	Amelia James Aylesbury	5	1	6	16	1	17	5	1	0
4	Benjamin Kemp Aylesbury	4	0	4	13	0	13	1	3	0
5	Charlie Thomas Banbury	5	0	5	7	1	8	3	1	0
6	Charlotte Campbell Warwick	0	2	2	12	0	12	2	1	0
7	Daniel Harrison Warwick	4	1	5	13	1	14	3	3	0
8	Danielle Johnson Didcot	3	0	3	12	1	13	2	1	0
9	Emily O'Brien Oxford	7	0	7	9	1	10	2	4	0
10	Erin Kirk Oxford	5	0	5	18	0	18	3	0	0

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Select the **"Valuers"** tab within the League Tables. This give 6 metrics which are used to rank the Valuers performance.

League Tables

Negotiators **Valuers** Sales Progressors Branches

Valuers

Pos	Name	Net Listings	Withdrawals	Gross Listed	Legals	Mortgages	Points
1	Amber Smith Banbury	25	1	26	4	9	0
2	Daniel Vaughan Oxford	27	1	28	7	2	0
3	Edward Davis Aylesbury	39	1	40	5	3	0
4	Fatima Lloyd Warwick	29	1	30	5	9	0
5	Julia Dickinson Didcot	22	1	23	6	2	0
6	Kyle Wood Aylesbury	34	0	34	6	6	0
7	Michael Tucker Oxford	27	0	27	9	4	0
8	Ruby Yates Warwick	32	1	33	5	5	0
9	William Price Banbury	22	0	22	3	5	0
10	Zoe Read Didcot	26	2	28	6	9	0

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Select the **"Sales Progressors"** tab, this gives 4 metrics that can be used to asses the Progressors performance.

If you do not have Sales Progressors in your company this can be turned off by Support.

League Tables

Negotiators Valuers **Sales Progressors** Branches

Sales Progressors

Pos	Name	Exchanges	Legals	Mortgages	Points
1	Alexander Lambert Oxford	2	0	0	0
2	Alfie Banks Warwick	6	0	0	0
3	Amelia James Aylesbury	5	0	0	0
4	Benjamin Kemp Aylesbury	6	0	0	0
5	Charlie Thomas Banbury	1	0	0	0
6	Charlotte Campbell Warwick	7	0	0	0
7	Daniel Harrison Warwick	4	0	0	0
8	Danielle Johnson Didcot	8	0	0	0
9	Emily O'Brien Oxford	2	0	0	0
10	Erin Kirk Oxford	4	0	0	0

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Select the **"Branches"** tab within the League Tables there are 12 metrics that can be used to rank the performance of branches.

At the very bottom of the screen there is displayed, the total figures for the selected month for (in this example) all branches.

The screenshot displays a software interface for a real estate professional. At the top, there is a bar chart comparing 'Legals this month' and 'Mortgages this month' for February 2026 and March 2025. Below this is the 'League Tables' section, where the 'Branches' tab is highlighted with an orange circle. The table below lists performance metrics for five branches and a total row. At the bottom, a summary bar for Michael Watson shows his address and key performance indicators for March 2026.

Pos	Name	Net Sales	Fallthrough Rate	Canx	Gross Sold	Net Listings	Withdrawal Rate	Withd.	Gross Listed	Exchanges	Legals	Mort.	Points
1	Aylesbury	21	4.5%	1	22	73	1.4%	1	74	18	20	20	0
2	Banbury	15	11.8%	2	17	47	2.1%	1	48	19	17	19	0
3	Didcot	15	0%	0	15	48	5.9%	3	51	14	16	18	0
4	Oxford	16	20%	4	20	54	1.8%	1	55	14	23	14	0
5	Warwick	11	21.4%	3	14	61	3.2%	2	63	21	17	20	0
6	Total	78	11.4%	10	88	283	2.7%	8	291	86	93	91	

Summary bar for Michael Watson (150 Avon Crescent, Overthorpe):
 291 listings, 88 sales, 86 exchanges, 93 legals, 91 mortgages. Month: March 2026.

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Selecting a specific month from the date picker filters ALL the on screen reports by time period selected.

Gross Listed	Exchanges	Legals	Mort.	Points
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0
0	0	0	0	0

0
exchanges

0
legals

0
mortgages

March 2026 ▼