Getting Started with Sales Manager – Team Performance Analytics Dashboards

Sales Manager – Team Performance analytics dashboards allow administrators to give sales managers and/or support staff access to dashboards reflecting their teams' efforts.

The available dashboards include:

- Customer Intelligence Conversion Metrics
- Sales Performance and Production
- User Activity

Note
If you have existing user roles that include the terms `admin`, `sales manager`, `branch manager`, or a similar version of those terms, the Sales Manager – Team Performance analytics dashboards may have been turned on for those roles already. You can log in as a user with each of these roles to verify whether these dashboards are visible. If they have not been turned on for users who should have access, proceed to the instructions below for more information.

Setup

1. Identify users who will get access to these 3 dashboards. Some examples of user roles may include:
   a. sales managers
   b. branch managers
   c. marketing specialists
   d. loan officer assistants
2. Update an existing user role (or create a new user role and assign it to identified users).
3. Reach out to your Implementation Manager or Customer Success Manager for assistance.
4. Create teams and assign the correct sales managers as "managers" of the team(s) to allow them access to view the data of the correct sales users. Sales manager users with access to these analytics dashboards can only see activity for the sales users that report to them in a team structure in Total Expert.
5. Provide your users with training resources about sales manager dashboards. See Related Resources below.

Related Resources

- *Sales Manager Dashboards – Team Performance Analytics*
- *Embedded Analytics Data Dictionary*
- *Analytics Dashboards User Guide*
- Reporting and Analytics page on the knowledge base
- The Expert Academy – *Sales Manager Dashboards* training for admins (video)

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