TOTAL EXPERT

Sales Manager Dashboards – Team Performance Analytics

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Overview

The Sales Manager – Team Performance analytics dashboards are designed to give leaders visibility into team activity, performance, and conversion. They are especially powerful for helping managers coach and drive engagement. These dashboards are:

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

Note
If you do not have customer intelligence enabled, the first of these dashboards contains no data for your organization.

Key Considerations

- The sales manager dashboards are currently in **open beta**.
  - Please provide any feedback via your customer success manager (CSM). We welcome your ideas!
- If data or team visibility appears incorrect:
  - Confirm that your user team structure or relevant data fields are configured correctly.
  - Contact your CSM for assistance.
- All dashboards default to showing all users (active and inactive).
  - Apply filters if you want to exclude inactive users.

Sales Manager Access

Users who are granted access to the sales manager dashboards can only see the data of users from teams that they are a manager of in Total Expert. This is the same group of people they have access to log in as.

As with other analytics dashboards, managers can duplicate these dashboards and customize the copies to highlight data that is most relevant for their teams

Best Practices for Administrators

By default, data for all users populates in the sales manager dashboards for administrators, such as the Marketing Admin account. Administrators can leverage additional fields like Location ID and Cost Center to create region or branch-level reports in the marketing admin account.

Strategic Use Cases

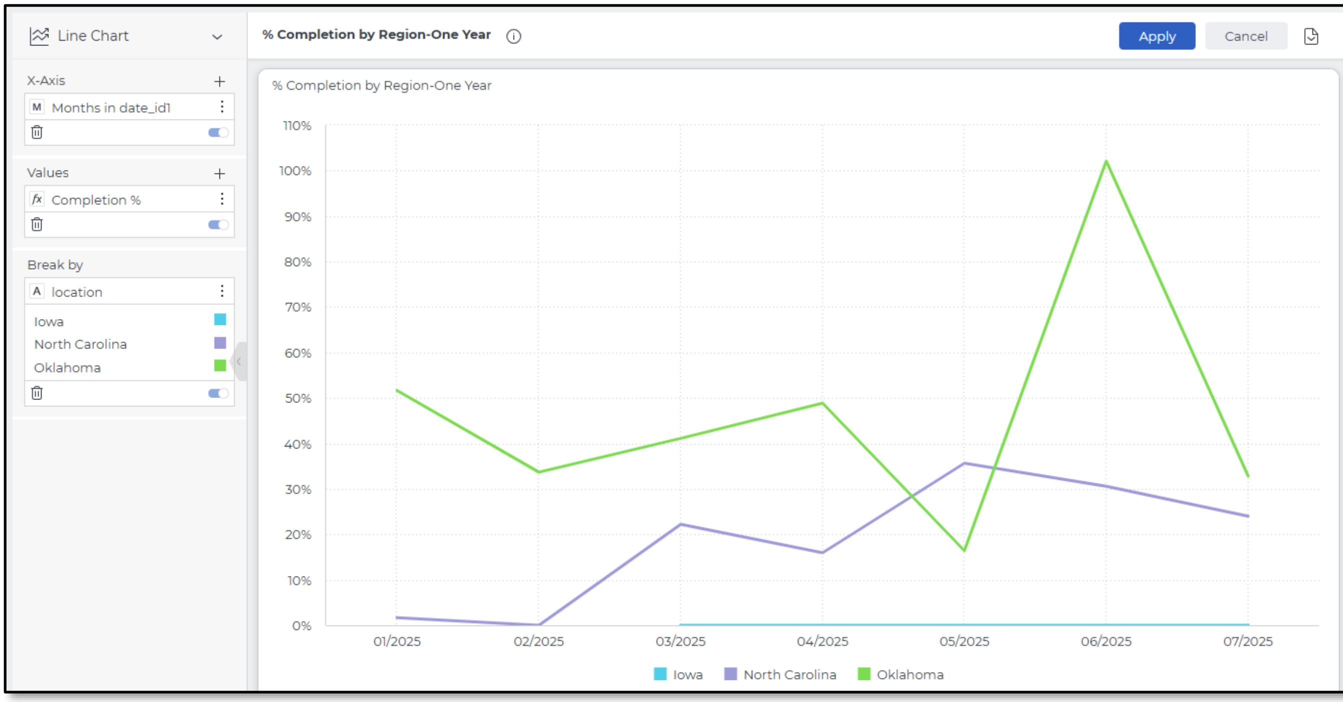
- **Regional and branch manager segmentation** – Use fields like Location ID or Cost Center to break down performance by market or team.
- **Executive-level reporting** – Surface consistent branch-level insights across your organization.
- **Manager coaching** – Track activity vs. conversions to guide performance conversations.
- **Usage visibility** – Identify low-engagement teams or standout users to take action.

Regional and Branch Managers Segmentation

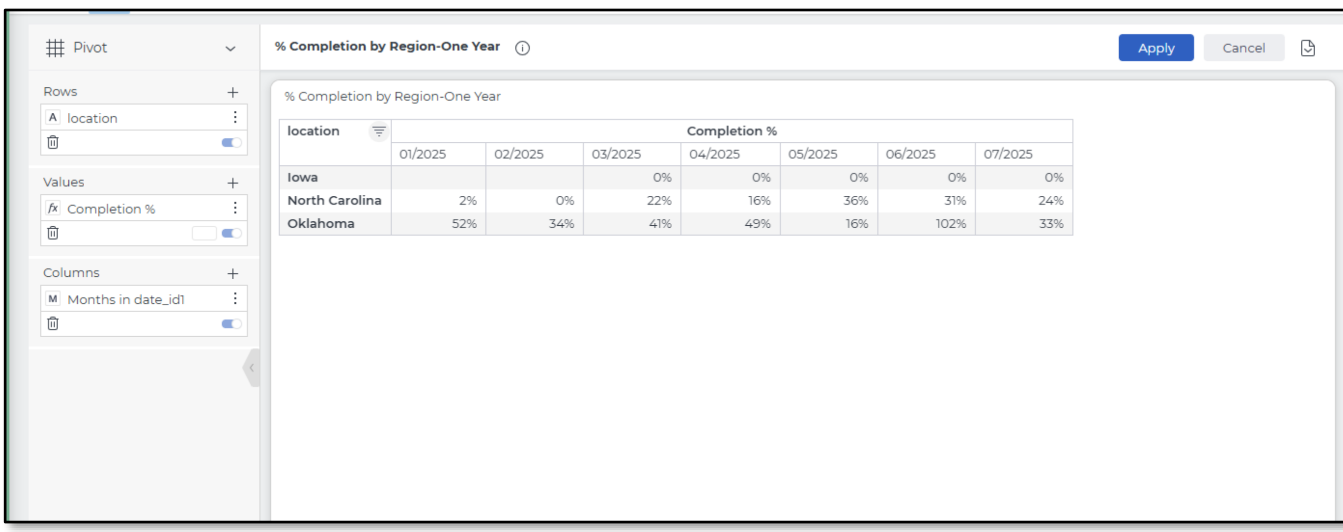
You can use existing fields in Total Expert—such as Location ID or Cost Center—to break down the dashboard data by team. These values can be uploaded into the platform using the importer.

Example

Below is an example of a line chart using Location ID to break down data by region to compare.



The following image is an example of a task completion rate table broken down by month and by region using the Location ID field in the rows.

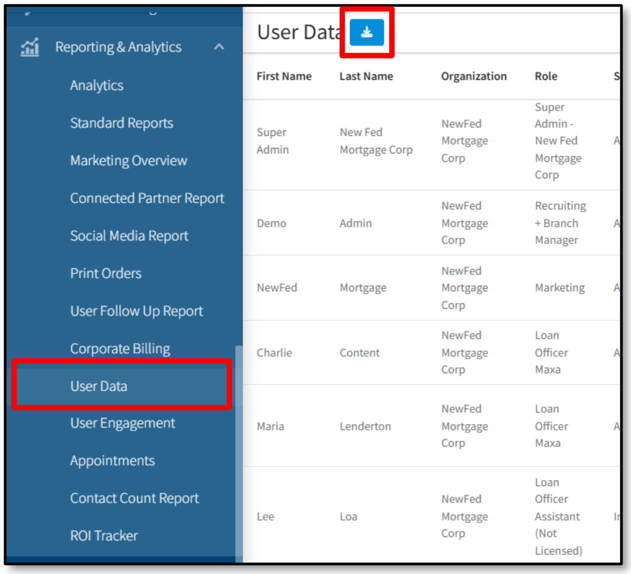


Note
Please consult with your CSM on the best field to use for this use case based on your organization's specific configuration.

Assigning Locations to Users

Export a CSV file listing all the users in your organization, add the location information, then re-import the user list:

1. Navigate to **Reporting & Analytics → User Data**.
2. Click the **export** (down arrow) button in the upper-left corner of the page.



3. Select a location in the file manager box and save the CSV file.
4. Open the exported file using Excel or other suitable CSV editor.
5. Delete all the columns except for the following:
    - `email`
    - `location_id`
    - `role_name`
    - `type_name`

	A	B	C	D	E
1	email	location_id	role_name	type_name	
2	superadmin@example.com		Super Admin	Lender	
3	marketingadmin@example.com		Marketing Admin	Lender	
4	loanofficer@example.com		Loan Officer	Lender	
5					

6. Populate the `location_id` column with the desired branch, region, or team values. These will be used to segment the dashboard data.
7. Save your changes.
8. Use the data importer to re-upload the user file, mapping the columns to the appropriate user fields. See *Using the Data Importer* for more information on using the importer.

Column Name	Example Data	Mapped Field
email	superadmin@example.com	User / Email
location_id		User Info / Location ID
role_name	Super Admin	Role / Name
type_name	Lender	User Type / Name

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Dashboard Customization

Each dashboard includes a pre-built structure to help you get started. From there, you can:

- Duplicate, edit, and tailor dashboards
- Customize key data points to meet your organization’s unique needs

Need support? Connect with your CSM for best practices and hands-on assistance.