Experienced Series for Mortgage Admins: Analytics Dashboards

Action Items

- Choose and build 1 of the dashboards discussed in training for your own use.
- Build your own dashboards to support your organization's needs.
- Download and share data from a dashboard with sales teams or leadership.

Dashboard Details

- Dashboards are available with a variety of data sets, including:
  - Campaign Performance
  - Loan Attribution and Demographics
  - User Activity
  - Customer Intelligence
- Admins can also create custom dashboards by filtering, rearranging widgets, or combining data points from a variety of dashboards into 1.
- Dashboards are view-only by default. To make edits, click the **More** button on the right side of the page, then click **Duplicate**. This makes a copy of the dashboard and moves you into Edit mode, which can be changed by toggling between **View** and **Edit** in the upper-left corner of the dashboard.
- To edit individual widgets, click the pencil icon (Edit Widget) in the upper-right corner of the widget. This opens the edit panels and allows you to change data points, designs, colors, and more. Click **Apply** to save any changes.

Use Cases

Tracking Best Practice Sales Processes

Related dashboards and widgets:

- Co-marketing partner connections sent versus created
  - Values: `Comarket_num_sent` and `Comarket_connections_created`
- Number of active important integrations like Office 365 and a price engine compared against total number of sales users
  - Values: `Has_office365_integration` and `Has_optimal_blue_integration` or `Has_marksman_integration`
- Task creation and completion
  - Values: `Tasks_num_journey_tasks_created` and `Tasks_num_journey_tasks_completed`
- Number of focused view outcomes logged
  - Value: `Fv_num_outcomes`

TOTAL EXPERT

Proving ROI from Total Expert

Related dashboards and widgets:

- Filtering Campaign Performance by lead nurture campaigns to demonstrate click rate if application link is included
- Self-Service Reporting – User Activity
- Number of active users by role
    - Create a table with values: `Full_name` and `User_role`
- Logins by user
    - Value: `Users_num_unique_user_logins`
- Number of print pieces created or social media graphics posted
    - Values: `Media_dynamic_print_media_created` and `Social_num_social_media_posts`
- Customer Intelligence Monitored Contacts by User
    - Values: `Monitored_contacts_total_active` and `Full_name`

Preparing for a Compliance Audit

Related reports:

- Marketing Compliance Report
    - Download a historical report of all assets created or download PDF copies of each asset.
- Marketing Overview Report
    - Export the entire table of data or an individual report of each marketing tool.
- Connected Partner Report
- Social Media Report
- Print Orders
- Weekly or Monthly Unsubscribe Report

Related Resources

- *Analytics Dashboards User Guide*
- *Embedded Analytics Data Dictionary*
- *Analytics: Reporting and Dashboards* (video)
- *Self-Service Reporting: Email* (eLearning)
- *Marketing Overview Report*
- *Standard Reports*