Reporting

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Introduction

The reporting tools in Total Expert allow you to analyze how you and other users in your organization are making use of the various features in the platform. Each report generally provides different metrics to help you understand what is—and is not—working well. Many report results are clickable, allowing you to access further details.

Note
Access to options in the Reporting and Compliance menus is controlled by various permissions; you will likely not have access to all of the available reports. If you believe that you should have access to a report you do not see, check with your system administrator.

Tip
Most reports are filterable—if you think something is missing from a report, check the filter options, including the date range.
Most reports have the option to export the contents to a comma-separated variable (CSV) file.

Reporting Menu Options

In general, the reports in this section summarize activity with Total Expert's various features by members of your organization.

Standard Reports

- Allows you to download weekly and monthly reports of several different types of data relevant to your organization, marketing efforts, and use of the platform.
- Does not display data directly; you must download CSV files to view the reported data.
- See *Standard Reports* for details on this page.

Marketing Overview

- Lists users and various metrics to track how they are—or are not—using Total Expert.
    - If you are an admin user, all the users in your organization except those designated as either admin or demo users are listed.
    - If you are not an admin user, only users who are members of teams you manage are listed (again excluding admin and demo users).
- By default, this report is filtered to activity over the last 30 days.

Connected Partner Report

- Lists the completed and pending co-marketing connections for users in your organization (excluding those designated as either admin or demo users) and metrics for each connection.
    - Users designated as admin users see connections for everyone in the organization who has any connections.
    - Team managers see connections only for members of teams they manage—including themselves.

Social Media Report

- Lists social media posts made by users in your organization and metrics for each post.
    - Posts scheduled for the future but not yet posted are not included.
- By default, this report is filtered to activity over the last 30 days. The date range is limited to 366 days.

Print Orders

- Lists print orders placed by users in your organization and details for each order.
- By default, this report is filtered to activity over the last 30 days.

Corporate Billing

- Lists all the times the organization's credit card account on file was charged, including information surrounding each charge.
- By default, this report's date range is not filtered.

User Data

- Lists all the users in your organization and various account settings for each.

Appointments

- Lists appointments stored in the platform.
- This report is filterable by user. By default, the report looks for appointments with contacts of either:
    - any users in teams you manage.
    - your co-marketing partners.
- By default, this report is filtered to appointments between 4 months ago and tomorrow.

Contact Count Report

- Graphs the number of contacts in your contact list added to the platform in each of the last 13 months.
- Includes contacts that you created, were shared with you, or were assigned to you.
- Shared or assigned leads are included in the month they were initially created, not when they were shared or assigned.
    - For example, if another user creates a contact on May 30th and shares it with you on June 2nd, that contact will be reflected in May's total in both users' reports.

Compliance Menu Options

In general, the reports in this section summarize information relating to Total Expert's compliance features, such as cost sharing and approvals, by members of your organization.

Media Markups

- Lists the default cost split markup for each print content template in your organization's library.
- You can view a template's default markup by selecting **Actions → View Grid** on this page.
- You can view any other markups saved for a template by selecting **Actions → Media Markups**.

Approved Media

- Lists the print content pieces that have been created from your organization's templates and are ready to send to a printer.
  - Includes pieces that have been approved and those that did not require an approval.
  - Pieces are not included while an approval is pending.
- The timestamp shown with each piece reflects when the piece was requested, not when it was approved.
- From the **Actions** menu for a piece, you can generate a PDF or PNG version of the final piece to download.

Websites

- Lists all the lead capture apps and single property sites created by members of your organization, including basic information for each (such as a link to the page, the user who created it, and the date it was created).

Marketing Compliance Report

- Lists print, social, merchandise, or banner ad orders or emails sent and some data for each.
  - One type is shown at a time.
  - The type listed in the report is determined by the Category field in the filter panel.
- By default, this report is filtered to print content orders over the last 30 days.