



Total Expert Dashboards

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Introduction

A dashboard in Total Expert (TE) provides a whole set of information, drawn from various parts of the TE platform, at a glance. There are several dashboards available in TE, each one designed to provide insight into information about a certain topic, such as funded loans or email marketing.

The Overview dashboard serves as the home screen when you log in to TE. It provides information across multiple areas and includes links to take you quickly to relevant details in the platform.

**Note**

Due to your organization’s setup and your user’s permissions, you will likely not see all the dashboard tabs. In addition, your organization may have custom setup within a dashboard, meaning you would see different tiles or panels.

Commonly Used Terms

Name	Description
dashboard	A page summarizing various related information pertaining to your user’s activity in TE.
panel	A large box on a dashboard enclosing a widget. Panels are typically located below any tiles on a dashboard.
tabs	A set of links at the top of a dashboard page allowing you to navigate to different available dashboards.
tile	A small box on a dashboard with a title and corresponding numerical information. Most tiles are linked to another page in the platform that shows details pertaining to the data summarized by the tile. Tiles are typically located at the top of a dashboard.
widget	A display of detailed information, such as a graph or a table, inside a panel (sometimes used to refer to the entire panel).

Overview Dashboard

The Overview dashboard is the page you see first each time you log in to TE. You can always navigate back to the Overview dashboard by clicking the **Overview** tab on any other dashboard or by clicking **Dashboard** at the top of the navigation menu. This page summarizes the basic data relating to your account and serves as an easy starting point for working with your account in TE.

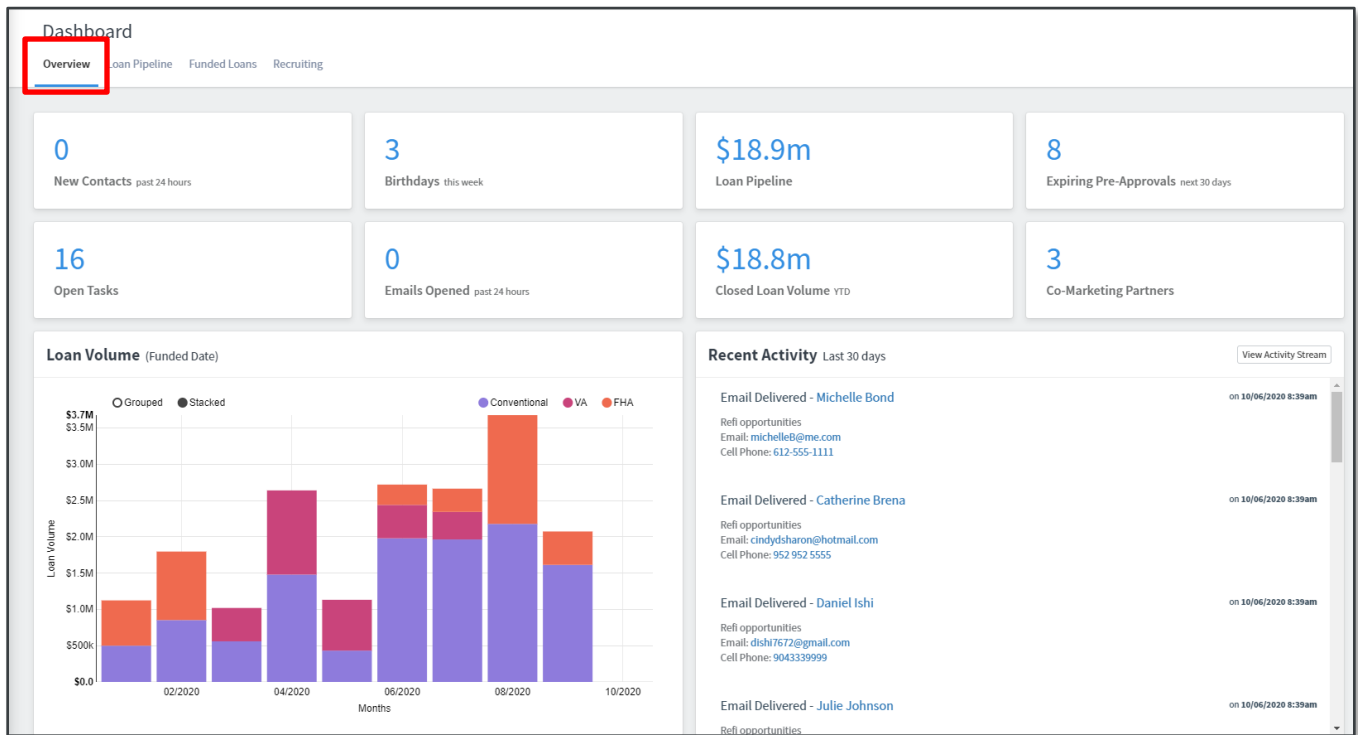
The setup of the overview depends on whether you are using a full account or free account. The default sets of tiles are described below; full account users may see different tiles according to their organization’s setup.

Note

Overview is the only dashboard tab available in free accounts. Full accounts may or may not include additional dashboard tabs, depending on the organization’s setup and the user’s role.



Full Accounts



Default Tiles

- **New Contacts** (past 24 hours) – Shows the number of contacts added to your list in TE where the record’s creation date is either yesterday or today. Click the tile to see the contact list filtered to show only these contacts.
- **Birthdays** (this week) – Shows the number of contacts in your list whose birthday is during the current calendar week, beginning with the most recent Sunday. For example, if today is Tuesday, October 6, then this will count those whose birthdays are between Sunday, October 4 and Saturday, October 10. Click the tile to see the contact list filtered to show only these contacts.
- **Loan Pipeline** – Shows the (approximate) total value of the loans created in TE for your contacts in the last 12 months and whose Funded Date is still blank. Click the tile to see the Loan Pipeline dashboard to show only these loans.
- **Expiring Pre-Approvals** (next 30 days) – Shows the number of loans whose pre-approval expiration date falls in the next 30 days, regardless of other information, such as loan status. Click the tile to see the loan list filtered to show only these loans.
- **Open Tasks** – Shows the number of tasks assigned to you in TE whose status is Incomplete. Click the tile to see the task list filtered to show only these tasks.
- **Emails Opened** (past 24 hours) – Shows the number of emails you have sent through TE that have been opened by the recipient either yesterday or today. Click the tile to see the Activity Stream filtered to these dates.
- **Closed Loan Volume** (YTD) – Shows the (approximate) total value of the loans created in TE for your contacts whose Funded Date is during the current calendar year. Click the tile to see the loan list filtered to show only these loans.



- **Co-Marketing Partners** – Shows the number of co-marketing partners your account is connected with. Pending connections are not counted. Click the tile to see the Co-Marketing Partners page.

Panels

- **Loan Volume** – Shows a bar graph of the volume of loans whose Funded Date is during the current calendar year. Amounts are broken down by month and color-coded by loan type.
- **Recent Activity** – Shows a listing of various activity associated with your account (emails being delivered, campaigns beginning or ending, leads being shared, and so on). This panel is limited to show only activity from the last 30 days. Click the **View Activity Stream** button in the upper-right corner of the panel to view the full Activity Stream page, which you can filter over any date range or type of activity.

Free Accounts

The screenshot shows a dashboard with the following components:

- Dashboard Overview:** A red box highlights the 'Overview' tab in the top left corner.
- Metric Tiles:**
 - New Contacts:** 0 (past 24 hours)
 - Hot Leads:** 7
 - Open Tasks:** 6
 - Pending Commission:** \$68k
 - Recent Uncontacted Leads:** 0 (Last 2 days)
 - Emails Opened:** 0 (past 24 hours)
 - Recent Email Click Throughs:** 0 (Last 2 days)
 - Co-Marketing Partners:** 1
- Recent Activity (Last 30 days):**
 - View Activity Stream** button
 - Email Delivered - Olivi Treacy:** on 10/06/2020 10:16am. Subject: Your Monthly Elevate - October 2020. Email: otreacy@wintrustmortgage.com
 - Email Delivered - Daniel Ishi:** on 10/06/2020 8:39am. Subject: Refi opportunities. Email: dish7672@gmail.com. Cell Phone: 9043339999
 - Email Delivered - Cindy Katznelson:** on 10/06/2020 8:39am. Subject: Refi opportunities. Email: katznelsonC@gmail.com. Cell Phone: 6129649911
 - Email Sent - Cindy Katznelson:** Katie Phillips on 10/06/2020 8:39am. Subject: Refi opportunities. [View Message](#)

Default Tiles

- **New Contacts** (past 24 hours) – Shows the number of contacts added to your list in TE where the record’s creation date is either yesterday or today. Click the tile to see the contact list filtered to show only these contacts.
- **Hot Leads** – Shows the number of contacts in your list in TE whose status is Hot. Click the tile to see the contact list filtered to show only these contacts.
- **Open Tasks** – Shows the number of tasks assigned to you in TE whose status is Incomplete. Click the tile to see the task list filtered to show only these tasks.
- **Pending Commission** – Shows the (approximate) total value of the transactions created in TE for your contacts whose status is Pending. Click the tile to see the Transactions report filtered to show only these transactions.



- **Recent Uncontacted Leads** (Last 2 days) – Shows the number of contacts added to your list in TE where the record’s creation date is either yesterday or today and who have no record of having been contacted yet. Click the tile to see the contact list filtered to show only these contacts.
- **Emails Opened** (past 24 hours) – Shows the number of emails you have sent through TE that have been opened by the recipient either yesterday or today. Click the tile to see the Activity Stream filtered to these dates.
- **Recent Email Click Throughs** (Last 2 days) – Shows the number of times a link in an email you sent through TE was clicked by one of the recipients either yesterday or today. Click the tile to see the Activity Stream filtered to these dates.
- **Co-Marketing Partners** – Shows the number of co-marketing partners your account is connected with. Pending connections are not counted. Click the tile to see the Co-Marketing Partners page.

Panels

- **Recent Activity** – Shows a listing of various activity associated with your account (emails being delivered, campaigns beginning or ending, leads being shared, and so on). This panel is limited to show only activity from the last 30 days. Click the **View Activity Stream** button in the upper-right corner of the panel to view the full Activity Stream page, which you can filter over any date range or type of activity.

Loan Dashboards

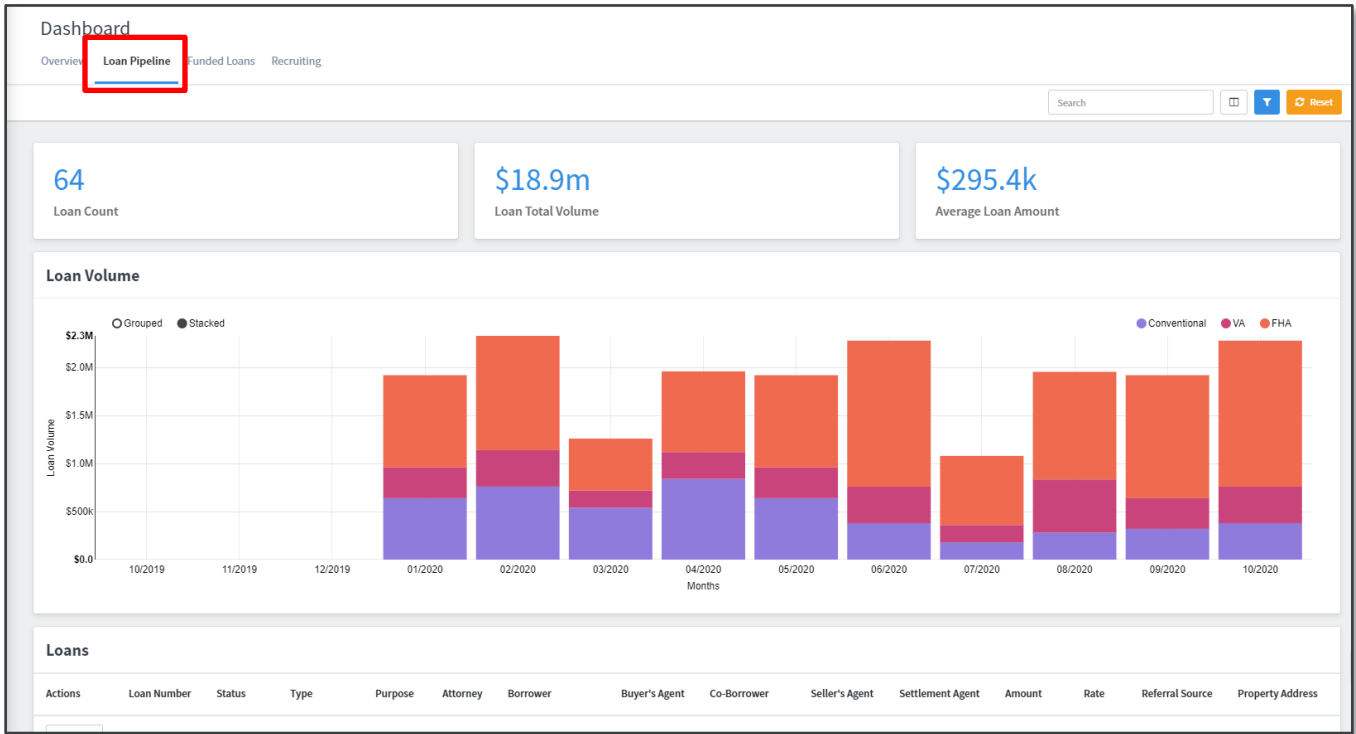
The Loan Pipeline and Funded Loans tabs are designed to give loan officers a way to review data relating to loans they have associated with contacts stored in TE. This data helps track trends over time and provides a snapshot of the current information.

Note

By default, these dashboards are keyed to what, if anything, is stored in the Funded Date field for a loan record (not the Status field). However, your organization can customize the setup during implementation; for example, loans with certain statuses may be excluded. Check with your system administrator for more about your organization’s customizations.

Loan Pipeline Tab

You can navigate to the Loan Pipeline dashboard by clicking the **Loan Pipeline** tab on any other dashboard.



This dashboard shows information for loans whose Funded Date field has not been filled yet. By default, the information is filtered to only loans created in the last 12 months; you can change this and the other parameters used by clicking the blue **Filter** button in the upper-right corner of the page and making desired changes in the Loan Filters box. (You can reapply the default filter by clicking the orange **Reset** button.)

The tiles at the top display information for loans that satisfy the current filter rules. When the filter rules change, the values shown update accordingly.

- The number of these loans
- The total value of these loans
- The average value of these loans

These tiles do not link to further information. Instead, the Loan Volume (bar graph) and Loans (table) panels below provide details about the loans that satisfy the filter rules. They also update as you change the filter rules so the information always corresponds to the numbers given in the tiles at the top.

In the Loan Volume graph, hover the mouse pointer over a bar to see information about that bar in a tooltip.

In the Loans table, click the name of a loan participant to see their contact details page. Click the loan number to see its loan details page. If you have permission to perform actions on the loan list page, those actions are also available here by clicking the **Actions** menu.

Funded Loans Tab

You can navigate to the Funded Loans dashboard by clicking the **Funded Loans** tab on any other dashboard.



Marketing Tab

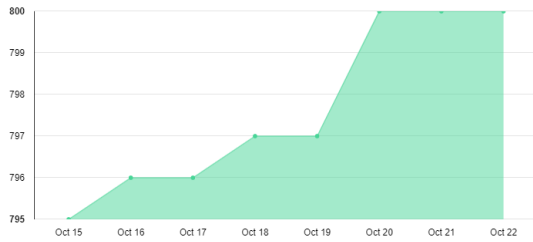
Dashboard

Overview Loan Pipeline Funded Loan **Marketing** Email

10/15/2020 - 10/22/2020

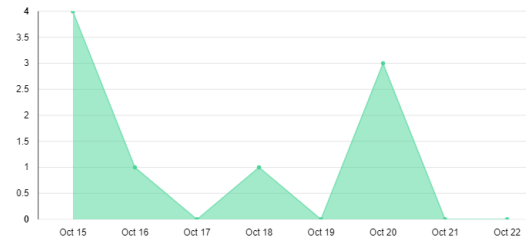
Total Contacts

800



New Leads

9



Campaign Activity

Name	Type	Average Contacts	Status	Scheduled Start	Scheduled End
Birthday - Video	Journey	20	Stopped	--	--
Post Close Campaign	Auto Campaign	7	Running	2019-05-24	--
Loan Anniversary Campaign - Summer	Auto Campaign	7	Running	2019-07-06	--
Open House - Medium Touch Follow Up	Journey	7	Running	--	--
Open House Follow-up - CB - 9 emails - 0066	Drip Campaign	6	Running	2019-10-24	--

<< 1 2 3 4 >>

New Leads by Source

Lead Source	Contact Count
LOS	2
Open House on Oct 15	1
Open House	1
123 Main Drive	1
Networking Event	1



<< 1 2 >>

Contacts By Organization Group

Organization Group	Contact Count
No Data Available.	

<< 1 >>



The widgets on this tab display data only relating to the date range shown at the top of the page. When you log in, the last date in this range is yesterday, and the first date is 7 days before that. So, if you log in on the 22nd, the range will default to the 14th through the 21st. You can change the range to any dates in the last 2 years.

If you navigate away from the tab (to another dashboard tab or elsewhere in the platform) then return, the date range you last selected will be retained. The range is also retained if the system logout timer expires and you log in again directly in the same tab. However, if you log yourself out and log back in, the date range returns to the default.

To select a date range, click the date field; the date picker opens. Click any 2 dates in the calendar as the endpoints of the desired range; data for the selected dates will be included along with any dates in between. Navigate forward and back through months by clicking the < and > buttons at the top of the date picker. You can also select predefined ranges by clicking either **Last 7 days** or **Last 30 days** on the left side of the date picker; these ranges end with yesterday.

The available widgets in this tab are Total Contacts, New Leads, Campaign Activity, New Leads by Source, and Contacts By Organization Group.

Total Contacts

This widget shows the number of contacts in the system for your entire organization on the last day of the selected date range. The line graph below shows this value on each day of the range. Hover the mouse pointer over each graphed point to see the exact value in a tooltip.

Note

It is possible for the same person to be represented more than once, either because multiple users have contact information for the same person, or because a single user has duplicate contacts. This widget does not attempt to account for this, so the count may be inflated.

New Leads

This widget shows the total number of new contacts added to your organization during the selected date range. The line graph below shows the number added on each day of the range. Hover the mouse pointer over each graphed point to see the exact value in a tooltip.

Campaign Activity

This widget lists any campaigns that were active at any time during the selected date range. The campaigns are listed by default in descending order of the average number of contacts. You can sort by any column by clicking its column header; reverse the sort order by clicking the same header again. Up to 5 campaigns are shown at a time. If more than 5 apply to the selected date range, use the page controls below the table to view the remaining items.

- **Name** – The name of a campaign. Click the name to see its read-only summary on a separate page.

Note

These summaries are only available for journeys and multi-channel campaigns, not auto campaigns or drip campaigns.



- **Type** – The type of campaign. The possible values are Auto Campaign, Drip Campaign, Journey, and Campaign.
- **Average Contacts** – This value is the result of taking the average of the number of contacts who were on the campaign on each day in the selected date range (rounded to the nearest whole number). Days in the range when the campaign was not active are not included.
- **Status** – This indicates whether the campaign was running or stopped at the end of the selected date range.
- **Scheduled Start** – The date when the campaign began. This does not apply to all campaign types.
- **Scheduled End** – The date when the campaign ended (or will end). This does not apply to all campaign types.

New Leads by Source

This widget breaks down where new contacts came from during the selected date range in both a table and a pie chart. Only contact records with a lead source applied are counted.

In the center of the pie chart is the total number of contacts counted by this widget. Contacts are counted if they were created during the selected date range and had a lead source defined when the aggregation job last ran. This job runs after the end of each day and updates the widget with the source defined for new *and existing* contacts. Only the most recent source aggregated for a contact is reported here. A contact with nothing stored in the lead source field is not counted.

For example, if you create a contact on the 2nd with source A, then on the 10th change the source to B and again to C, then beginning with the 11th, only C is reported—even if you report on the range of the 1st through the 9th.

Hover the mouse pointer over a wedge of the pie to see the corresponding data in a tooltip.

The table lists the sources now applied to contacts that were created during the selected date range. The table is sorted by the number of contacts in descending order. Up to 5 sources are shown at a time. If more than 5 apply to the selected date range, use the page controls below the table to view the remaining items. The colored dot to the left of the source name in each row matches the color of the corresponding wedge in the pie chart.

Contacts By Organization Group

This widget breaks down how your organization's contacts are organized into groups in both a table and a pie chart. Only contact records assigned to a group are counted.

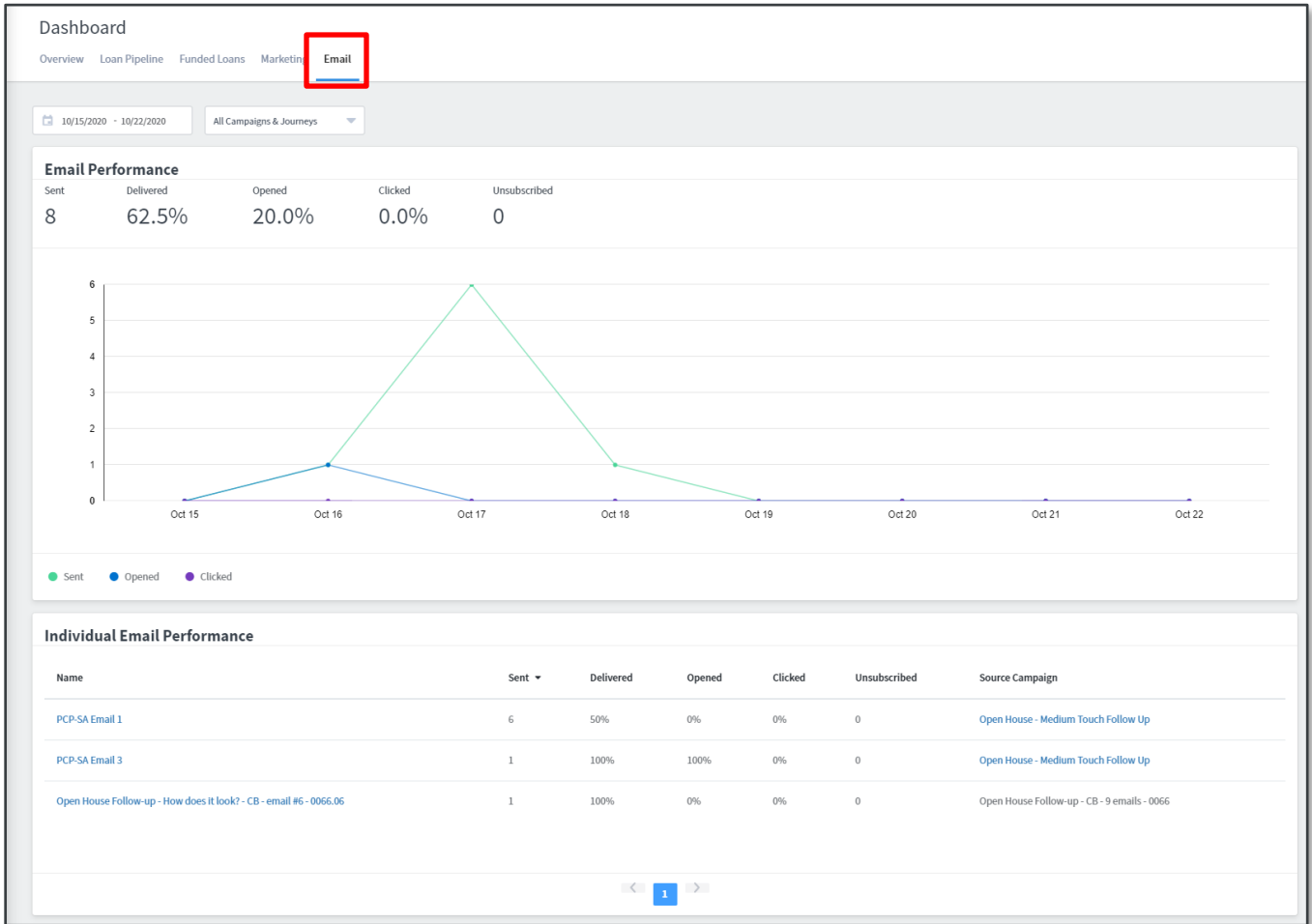
In the center of the pie chart is the total number of contacts counted by this widget. The numbers reported are a snapshot of how groups were used on the last day of the reported range (which means you will see the same results regardless of what start date you selected as long as the end date is the same).

Hover the mouse pointer over a wedge of the pie to see the corresponding data in a tooltip.

The table lists the groups that contacts were assigned to on the final day of the date selected date range. The table is sorted by the number of contacts in descending order. Up to 5 groups are shown at a time. If more than 5 apply at the end of the selected date range, use the page controls below the table to view the remaining items. The colored dot to the left of the group name in each row matches the color of the corresponding wedge in the pie chart.



Email Tab



The Email tab has a date range picker that works the same way as the one on the Marketing tab. (You can select different date ranges on each tab, and each will be retained separately.)

In addition, there is a second filter that determines which campaigns the widgets on this tab display data for. Like the date range picker, this filter applies to all the widgets on this tab. By default, the selection is All Campaigns & Journeys. Otherwise you can choose exactly 1 option from this list. Note that the available options in this filter depend on the date range; only campaigns or journeys that have data in the selected range are available in the filter list.

The available widgets in this tab are Email Performance and Individual Email Performance. These widgets only include information for automated email messages, not manually sent messages.

Email Performance

This widget shows data involving automated email messages sent by the selected campaign(s) on behalf of all users in your organization during the selected date range.

- **Sent** – The total number of messages the platform attempted to send during the selected date range.
- **Delivered** – The percentage of sent messages that successfully reached the recipient’s inbox.



- **Opened** – The percentage of *delivered* (not sent) messages that were opened by the recipient. This is measured according to when the email was sent, not when it was opened. (If an email was sent on the 10th but not opened until the 12th, and the range is selected as the 4th–11th, then that open is counted in that date range even though it wasn't opened until later.) If a recipient opens the same email more than once, it is still only counted as 1 here.
- **Clicked** – The percentage of *delivered* (not sent) messages that included a link that was clicked by the recipient. As with Opened, this is measured according to when the email was sent, not when the link was clicked. Likewise, if a recipient clicks more than once in the same email, it is still only counted as 1.
- **Unsubscribed** – The total number of messages that prompted the recipient to unsubscribe from future emails. As with Opened, this is measured according to when the email was sent, not when the recipient unsubscribed.

The line graph below these values shows the raw counts of messages Sent, Opened, and Clicked for each date in the selected range. As with the values given above, the counts of Opened and Clicked messages are tied to the date the message was sent, not when the recipient acted. Hover the mouse pointer over each graphed point to see the exact value in a tooltip.

Individual Email Performance

This widget shows the same data points that were aggregated in the Email Performance widget, but this time broken down by each email template. There is 1 additional column that is not represented above:

- **Source Campaign** – The name of the campaign that the email was sent from. For journeys and multi-channel campaigns, click this name to see its read-only summary. This directs to a separate page. (These summaries are not available for auto campaigns or drip campaigns.)

Note

Emails that have been sent directly (not as part of a campaign) display the text `Unknown or deleted default campaign` in this column.

The templates are listed by default in descending order of the number of times they were sent. You can sort by any column by clicking its column header; reverse the sort order by clicking the same header again.

The table shows data for up to 5 templates at a time. If more than 5 were sent within the selected date range, use the page controls below the table to view the remaining items.

In the first column, click the name of an email template to see a preview of that message. This is shown in a pop-up window on the current page. Regardless of which user(s) that message was sent on behalf of, this preview will use your user information to populate any relevant placeholders.

Recruiting Dashboard

You can navigate to the Recruiting dashboard by clicking the **Recruiting** tab on any other dashboard.



Dashboard

Overview Loan Pipeline Funded Loans **Recruiting**

8 Open Tasks

1 New Prospect

1 Marketing Kit Sent

0 Pricing Call Held

1 Comp Proposal Sent

0 Comp Discussion Held

0 Attended ETD

0 Contract Sent

Recent Activity Last 30 days [View Activity Stream](#)

Email Delivered - Michelle Bond on 10/06/2020 8:39am
Ref: opportunities
Email: michelleB@me.com
Cell Phone: 612-555-1111

Email Delivered - Catherine Brena on 10/06/2020 8:39am
Ref: opportunities
Email: cindysharon@hotmail.com
Cell Phone: 952-952-5555

Email Delivered - Daniel Ishi on 10/06/2020 8:39am
Ref: opportunities
Email: dish7672@gmail.com
Cell Phone: 9043339999

Email Delivered - Julie Johnson on 10/06/2020 8:39am
Ref: opportunities

This dashboard is designed to help keep track of where various potential employee recruits are in the recruiting process. Because each organization’s process is different, this dashboard is different for each organization that uses it.

This dashboard includes a maximum of 8 tiles; the first is generally keyed to the number of open tasks in your TE account. The remaining tiles are custom for each organization and are keyed to the statuses used in the journey your organization has set up to manage the recruiting process. Each tile indicates the number of contacts at each stage of the process.

The Recent Activity panel below is the same as that used on the Overview dashboard.