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Shortcuts to building useful reports: webcast
Thursday, January 18th, 3pm EET
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Agenda

- Templates library
- Setting up your own reports and dashboards
- Tips & Tricks

Dashboard templates

Great place for getting started

- Examples of different reports
- Option to use templates with your data
- Guidelines on how to import template into your account

Report and dashboard import

How to import a dashboard

- building your first Sales report dashboard
- adjusting default time in reports

How to modify a dashboard

- deleting unwanted report
- basic modifications

Creating new dashboards

Creating new dashboards

- sales dashboard
- item dashboard
- sales person dashboard
- customer dashboard

Adding reports from Templates page

Adjusting reports to your needs

Sales reports dashboard

Adding / removing “common field”

Removing reports that should be placed in other dashboards

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Building other dashboards (1)

Items report dashboard

- top items
- items not sold

Sales person dashboard

- gauge setup
- customer dashboard

Building other dashboards (2)

Customers report dashboard

- top customers
- items not sold
- unpaid invoices

Audrey’s personal dashboard

- gauge setup
- Audrey’s results table
- Audrey’s customers unpaid invoices

How to analyse your reports

Sales report dashboard – sales increase report

- zoom function
- graphs as tables
- drill into
- drill through
- drill across

Tips & Tricks

Support centre

- documentation
- other webinars

Dashboard e-mail

Export to XLS or PDF

Advanced dashboard templates