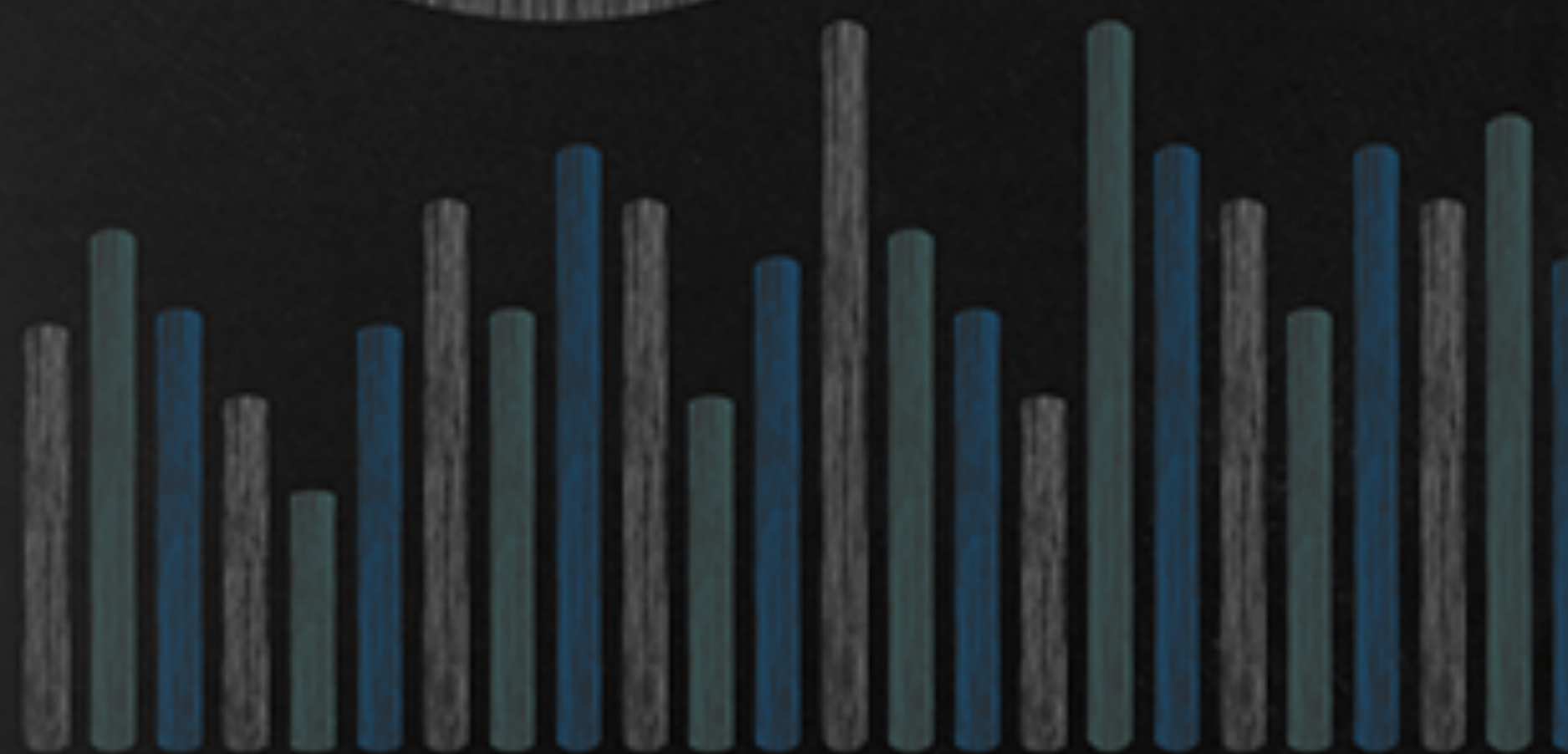
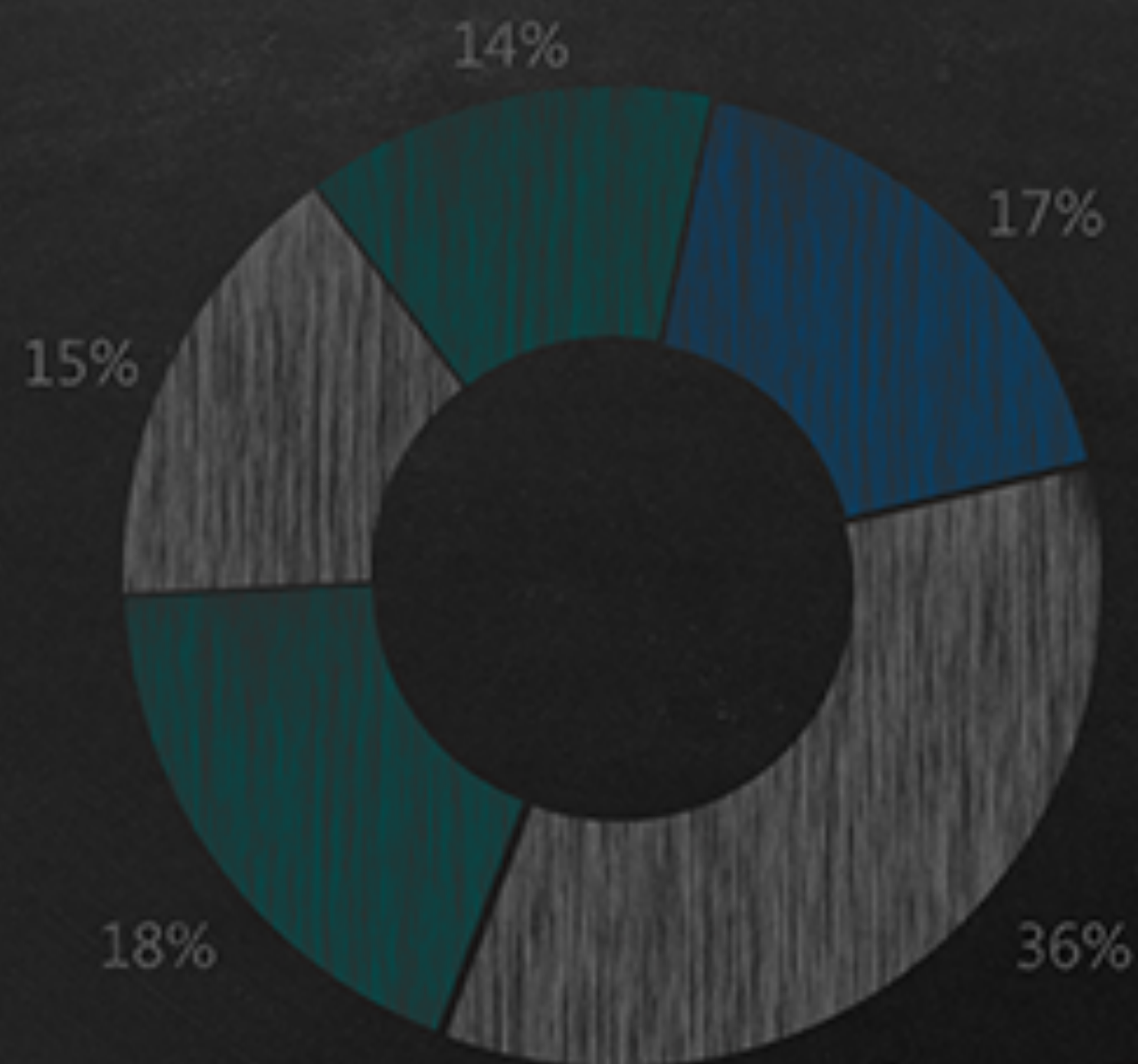


# Shortcuts to building useful reports: webcast

Thursday, January 18th, 3pm EET

51%

17%





# 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

The background features a dark theme with a glowing lightbulb in the center, surrounded by a bar chart with blue and grey bars. In the foreground, there are three horizontal bars with percentages: a grey bar at 51%, a teal bar at 32%, and a blue bar at 17%.

# Sales reports dashboard

Adding / removing “common field”

Removing reports that should be placed in other dashboards

# 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