Data Insights & Reporting

Basic Functions of Chart Types:

- Quickly filter out information by clicking on its label in the legend. Click on the label once more and everything will go back to normal.
- **Pie Charts**: Click a portion of the chart to distinguish it from the others or return it to original position.
- **Trend Graphs**: Hover cursor over data point to see values. Easily filter trends using the contact groups/pipelines you've created.
- To move/reorganize the charts/reports, click and hold the 6 dots on the top left and drag it to desired position.
- To resize the chart/report, use the arrow on the bottom right.
- To edit, rename, duplicate, or delete your chart, click on the 3 dots on the top right.
- The bottom left corner shows when data was last refreshed. Some charts allow you to refresh them at your convenience.

Homepage

The homepage has three (3) live reports:

- **Enrollments by Product**
- **Enrollments by Carrier**
- **Active Policies by Carrier**

These are fixed and can't be modified beyond basic functions.

Dashboards & Report Creations

You can create an unlimited number of Dashboards. Toggle in between them using the drop-down option in the top left-hand corner of the page. Dashboards are how you will keep all charts/ reports in one place while staying well-organized!

If that sounds perfect, skip the next section and start building out your reports/ dashboards.

Object Pages (Policies, Enrollments, Carriers, etc.)

In the top right corner of each object page, there are three (3) viewing options.

From left to right: Chart, Table, Board

If you select the Chart icon, you can create charts & reports within each object. Like dashboards, you can make multiple pages of charts/reports and toggle between them. Unlike dashboards, you'll have to go into each object to view these charts/reports.

Creating Charts/Reports

The email marketing hub dashboard is already created for you! Track ROI on email marketing efforts there!

Best Practice: Build reporting dashboards to ensure easy access & shareability.

1. Click ‘ADD DASHLET’
2. Dashlet Type – Choose Area & Report Type
    a. **Activities**
        i. Number of Activity Submissions
        ii. Scheduled Activities
    b. **Pipelines**
        i. Enrollments
        ii. Policies
        iii. Carriers
    c. **Marketing**
        i. Lead Source Breakdown Over Time
        ii. Leads Added
        iii. Leads Added by Source
    d. **Emails**
        i. Complaint %
        ii. Delivery %
        iii. Interaction Status
        iv. Opt Out %
        v. Emails Sent
3. Define Values & Constraints
4. Display Settings – choose chart type
5. Click ‘ADD’

To make changes, on the top right corner of the dashlet, click on ‘Edit Dashlet’ button that looks like this