

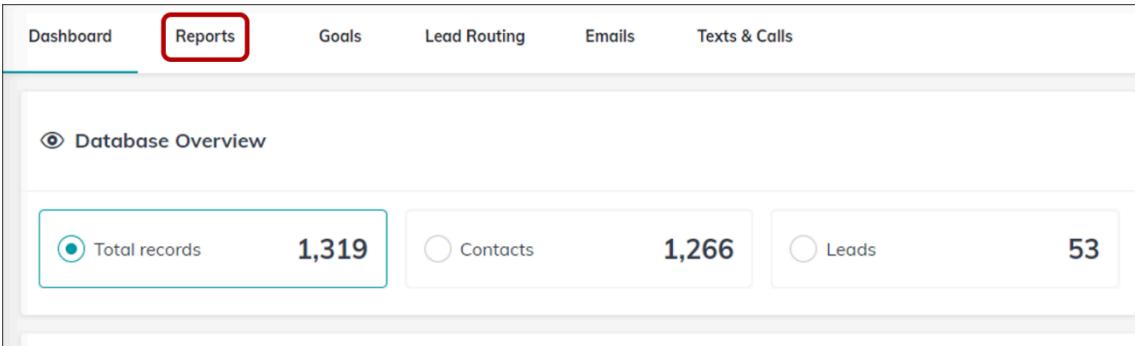
Exportar Relatórios no Command

No Command tens agora a capacidade de ver e exportar relatórios baseados nas bases de dados e atividades, monitorização de objetivos e perspetivas de oportunidades.

Para exportares Relatórios no Command:

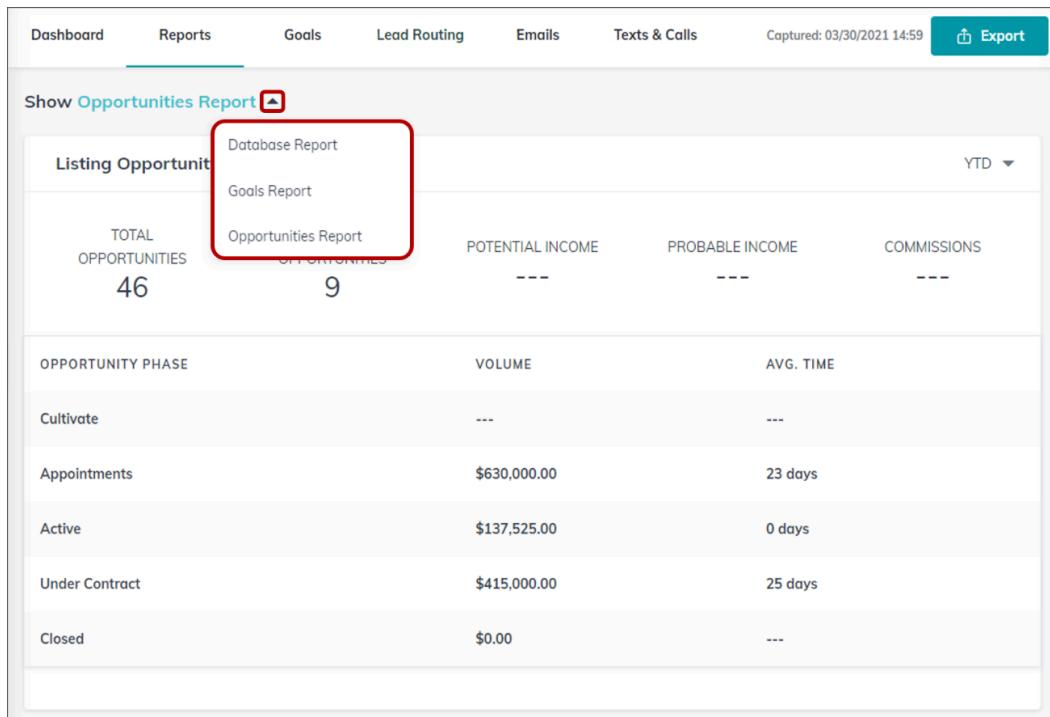
Acesso

1. Inicia sessão em <https://agent.kw.com> com as tuas credenciais de acesso Keller Williams.
2. Clica no ícone Reports (Relatórios), , na barra lateral esquerda.
3. Clica no separador Reports (Relatórios).



The screenshot shows the Command software interface. At the top, there is a navigation bar with tabs: Dashboard, Reports (which is highlighted with a red box), Goals, Lead Routing, Emails, and Texts & Calls. Below the navigation bar, there is a section titled 'Database Overview' with three data points: 'Total records' (1,319), 'Contacts' (1,266), and 'Leads' (53). Each data point has a circular icon to its left: a blue circle for Total records, a white circle for Contacts, and a white circle for Leads.

4. Selecciona o tipo de relatório que queres exportar utilizando a seta de abertura "Show".



The screenshot shows the SmartPlans dashboard with the 'Reports' tab selected. At the top, there are links for Dashboard, Reports, Goals, Lead Routing, Emails, and Texts & Calls, along with a timestamp 'Captured: 03/30/2021 14:59' and an 'Export' button. Below this, a section titled 'Show Opportunities Report' is displayed. A red box highlights the 'Opportunities Report' option in a dropdown menu. The main area shows a summary table with the following data:

Listing Opportunity		YTD
TOTAL OPPORTUNITIES	OPPORTUNITIES	
46	9	---
POTENTIAL INCOME		PROBABLE INCOME
---		---
COMMISSIONS		---

Below this is a table showing Opportunity Phases with their corresponding Volume and Average Time:

OPPORTUNITY PHASE	VOLUME	AVG. TIME
Cultivate	---	---
Appointments	\$630,000.00	23 days
Active	\$137,525.00	0 days
Under Contract	\$415,000.00	25 days
Closed	\$0.00	---

Podes exportar três tipos diferentes de Relatórios:

1. **Database Report** (Relatório da Base de Dados) - Mostra o desempenho da tua base de dados (database health score), a atividade total em SmartPlans (a que SmartPlans o contacto é adicionado) e também monitoriza o número de leads que tens por fonte de lead.
2. **Goals Report** (Relatório de Objetivos) - Monitoriza o progresso dos teus objetivos a um nível mensal ou anual.
3. **Opportunities Report** (Relatório de Oportunidades) – Visualiza as tuas Opportunities totais, as tuas novas Opportunities, o volume total para cada fase, e o tempo médio que demora a mover uma Opportunity através do teu canal de atividades.

5. Clica no **botão Export** (Exportar), , no canto superior direito da página.

6. Selecciona o teu **formato desejado do ficheiro de exportação**. Podes exportar o ficheiro em formato **PDF** ou **CSV**.

Database Report Export

Export Preview

kw YOUR REPORT FROM KWCOMMAND 01-31-2020 | 13:49

Database Overview YTD ▾

DB RECORDS	DB HEALTH SCORE	NEW CONTACTS	TOTAL CONTACTS	NEW LEADS	TOTAL LEADS
13,253	36.36%	554	8,263	145	4,990

Activities Today ▾ Lead by Sources Today ▾ Leads YTD ▾

ACTIVITIES NAME	TOTAL	SOURCES	TOTAL	DATABASE FIELDS	RECORD...
Total Activities	8	Total # of Sources	2	Total	4990
Total Smart Plans	2	KW Landing Page	8	New	145
Total Emails	5	Zillow	1	Phone Number	5.77%
Total Texts	0			Email Address	96.15%
Total Notes	0			Address	0.66%
Total Favorited Listings	0			Neighbourhoods	1.04%
Total Search Neighborhood	1			Home Anniversaries	0.28%
Total Meetings	0			Birthdays	0.44%

Cancel PDF Export CSV Export

Uma vez que o teu Relatório tenha sido exportado, deverás poder recuperá-lo dos ficheiros de Transferências no teu computador.