

Manager Dashboard Goals

We ask our agents to set goals to make sure they stay on track throughout the year. On the Manager Dashboard, you can set your own goals for your office! You can either use an aggregated total of all the goals your agents have set, or you can set a goal for your office!

Setting your Manager Dashboard goal

1. From your manager dashboard, select the **Goals** module or **Goals** in the navigation bar.

The image shows two identical screenshots of the Manager Dashboard interface. In both, a red arrow points to the 'GOALS' tab in the top navigation bar. The dashboard displays a 'Goals' module with a large '51%' indicator and a 'Sales Flow' section with four categories: Marketing (291), Prospects (3037), Actives (165), and Pending (45). Below the Sales Flow are sub-cards for each category with additional metrics like 'people' and 'transactions'. The 'Agents' section is visible at the bottom of each screenshot.

Goals Module Data:



Transactions	Avg. Size	Avg. Rate
128	\$4.1M	98%

Sales Flow Data:

Marketing	Prospects	Actives	Pending
291	3037	165	45
	3037 people 3309 transactions	165 people 200 transactions	45 people 48 transactions

2. Select the **Gear wheel** in the top right corner.

MANAGER ▾ DASHBOARD CALENDAR GOALS





Custom GCI Goal



51%

transactions
128
avg size
\$4.1M
avg rate
98%

Category	Closed Transactions			Details
Closed Transactions	BUYERS	SELLERS	ALL	All - Transactions Completed
Active & Pending	Transactions Completed	Transactions Completed	Transactions Completed	LISTING SIZE AGENT
Prospects	14	114	128	12345 CloseTranse \$ 4M Autobot1 Agent
GCI Forecast	Avg. Time to Close	Avg. Time to Close	Avg. Time to Close	4001 Close Transe: \$ 550K de sharp
	3 Days	1 Days	1 Days	12345 CloseTranse \$ 4M Autobot1 Agent
	Avg. Size	Avg. Size	Avg. Size	4001 Close Transe: \$ 550K de sharp
	\$3.7M	\$4.2M	\$4.1M	12345 CloseTranse \$ 4M Autobot1 Agent
	Close Rate	Close Rate	Close Rate	4001 Close Transe: \$ 550K de sharp
	82%	100%	98%	12345 CloseTranse \$ 4M Autobot1 Agent
				4001 Close Transe: \$ 550K de sharp
				Totals: \$ 527.2M



MANAGER ▾ DASHBOARD CALENDAR GOALS





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avg size
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3. Select Office GCI Goal.

MANAGER ▾ DASHBOARD CALENDAR GOALS

Category

- Closed Transactions
- Active & Pending
- Prospects
- GCI Forecast

Custom GCI Goal

51%

transactions
128
avg size
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Closed Transactions			Details
BUYERS	SELLERS	ALL	All - Transactions Completed
Transactions Completed	Transactions Completed	Transactions Completed	
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Avg. Time to Close	Avg. Time to Close	Avg. Time to Close	
3 Days	1 Days	1 Days	
Avg. Size	Avg. Size	Avg. Size	
\$3.7M	\$4.2M	\$4.1M	
Close Rate	Close Rate	Close Rate	
82%	100%	98%	

LISTING	SIZE	AGENT
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
12345 CloseTranse	\$ 4M	Autobot1 Agent
121212332324434	\$ 45.5M	Ben Cearlock
4001 CloseTranse	\$ 550K	de sharp
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
eeeeee eeeeeee	\$ 30M	Ben Cearlock
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
12345 CloseTranse	\$ 4M	Autobot1 Agent
4001 CloseTranse	\$ 550K	de sharp
4001 CloseTranse	\$ 550K	de sharp
Totals:	\$ 527.2M	

Engage Settings

Office GCI Goal

Tour

Help Center

Got Feedback?

MANAGER ▾ DASHBOARD CALENDAR GOALS

Category

- Closed Transactions
- Active & Pending
- Prospects
- GCI Forecast

Custom GCI Goal

51%

transactions
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Closed Transactions			Details
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Engage Settings

Office GCI Goal

Tour

Help Center

Got Feedback?

4. Here you can select the type of goal you would like to be displayed in your Goals Module.
 - a. Aggregate GCI Goal: This will take a total of all the GCI goals set by your agents.
 - b. Custom GCI Goal: Here you can set a GCI goal for your office.

<p>Office GCI Goal ✕</p> <p>a</p> <p><input checked="" type="radio"/> Aggregate GCI Goal This goal is an aggregate of all your agents' individual GCI goals.</p> <p><input type="radio"/> Custom GCI Goal Enter a custom goal for your office and we'll help you reach it.</p> <p>2017 <input type="text" value="Example: \$750,000"/></p> <p>b</p> <p><input type="button" value="DONE"/> <input type="button" value="CANCEL"/></p>	<p>Office GCI Goal ✕</p> <p>a</p> <p><input checked="" type="radio"/> Aggregate GCI Goal This goal is an aggregate of all your agents' individual GCI goals.</p> <p><input type="radio"/> Custom GCI Goal Enter a custom goal for your office and we'll help you reach it.</p> <p>2017 <input type="text" value="Example: \$750,000"/></p> <p>b</p> <p><input type="button" value="DONE"/> <input type="button" value="CANCEL"/></p>
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Office GCI Goal

- a** **Aggregate GCI Goal**
This goal is an aggregate of all your agents' individual GCI goals.
- Custom GCI Goal**
Enter a custom goal for your office and we'll help you reach it.
2017
b

DONE **CANCEL**

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2017
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2017
b

DONE **CANCEL**