Run a Broker Report

Summary
Describes how to run the Transactions, Agent Usage, Tasks, and Call Logs reports in TransactionDesk.

Context
Run broker reports in TransactionDesk to stay informed as to your agents' productivity and system usage. The reports provide you with insights into your business' performance, as well as any opportunities for sales performance management and coaching with your agents and staff.

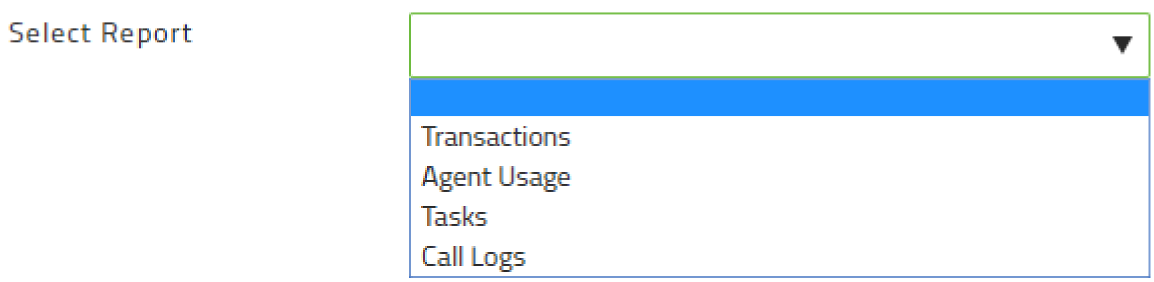
Before you begin

You require Super User login credentials to run reports.

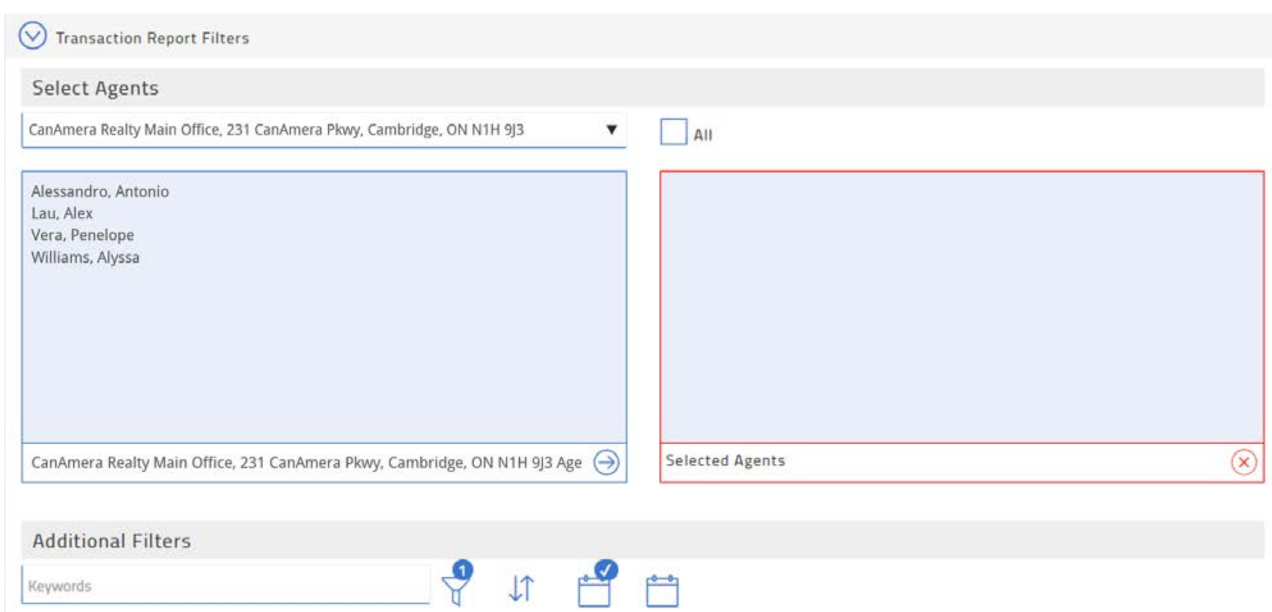
Steps

Run or Download a Report

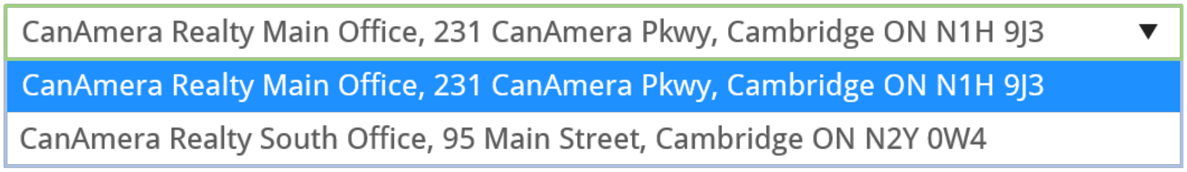
1. Navigate to **Broker Tools** > **Reports**.
2. Use the **Select Report** dropdown to select the report you need to run.



3. The Transaction Reports Filters area opens.



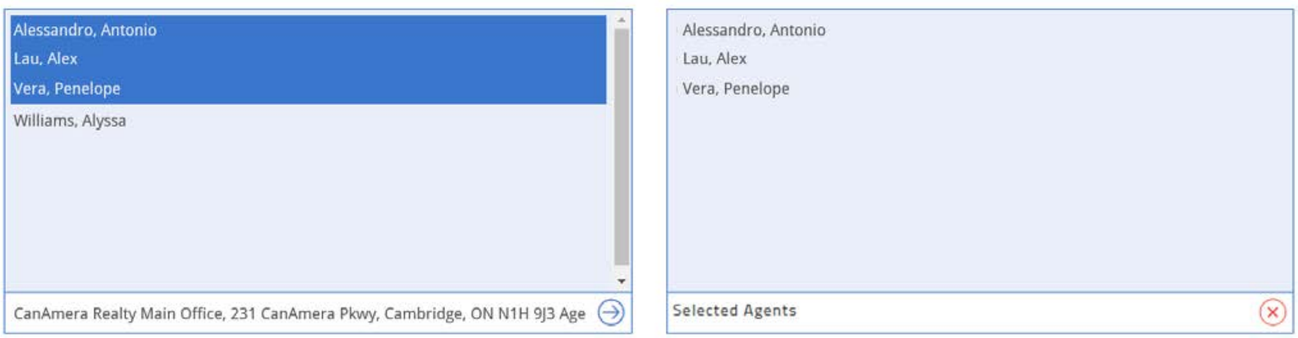
4. Do one of the following:
   - Use the office drop down to select the office containing the agents you need to run the report for.



   - Check **All** to select all agents from all offices.

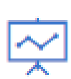
5. In the left hand list, click the agents you need to run the report for.

   The agents are added to the Selected Agents list on the right.



6. Optional: Click add entire office  to add all agents from an office to the Selected Agents list on the right.
7. Optional: Use the Additional Filters area to pre-filter your report results.

   Note: The available filters vary by report.

8. Do one of the following:
   - Click export report to PDF  to download the report results to your device as a .pdf file.
   - Click export report to CSV  to download the report results to your device as a .csv spreadsheet.
   - Click run report  to run the report in TransactionDesk.

Report Information

Name of Report	Description	Available Filters	When to Run
Transactions	Lists all transactions associated with the selected agents, and displays: • Transaction status • Name of the assignee • Name of the assigner • Transaction closing date • Transaction sale price	• Keyword • Transaction status • Sort high to low, A-Z • Last modified date range • Closing date range	As a broker: run as needed to view information for specific agents or offices or to drill down to gain more information on your transaction pipeline. As an admin: run weekly to provide your broker with a pipeline report.
Agent Usage	Lists all selected agents, and displays: • Agent name • Date the agent first logged in to TransactionDesk • Date the agent last logged in to TransactionDesk • Total number of logins to TransactionDesk to date	• Date range	When you are rolling TransactionDesk out to your agents to gain insights into their login activity and use of the system.
Tasks	Lists all tasks associated with the selected agents and displays: • Task name • Task status • Name of the assignee • Name of the assigner • Task due date • Transaction the task is associated with	• Keyword • Transaction/ Owner status • Sort high to low, A-Z • Last modified date range • Due date range	As a broker: run as needed when you need to drill down further into your agents' activities than what the Transactions Report provides. As an admin: run as needed to view what tasks are assigned to your staff and agents
Call Logs	Lists all transactions that have call information associated with the selected agents, and displays: • Transaction name • Name of the caller	• Keyword • Sort high to low, A-Z	As a broker: run as needed to gain insights as to your agents' sales conversion activities, and to identify opportunities for sales

	• Name of the call subject • Date the call log was created • Whether the call was dealt with		performance management and coaching.