## About this Document

This document is intended to be used as a supplement to the associated training video [e.g., “Pacing and Allocations for Lead Providers”]. It contains the same steps that are described in the video but provides the information in written format for additional reference.

This document is intended for the Lead Provider audience group.

## About the Lead Buyer Dashboard

The Lead Buyer Dashboard View allows you to see how well your leads are performing or “pacing” for selected or all lead buyers. You can use this type of report to view lead performance over the specified date range for a single lead buyer or multiple/all lead buyers, allowing you to determine how your leads and channels are pacing against your selling goals.

When configuring the Lead Buyer Dashboard to show pacing and/or allocation information for your leads, you may want to show the report for one school only or for all of your schools together. You can use this type of report to show the number of leads remaining in your inventory and/or the next month’s target allocation, in the same view or broken out into separate views. This type of lead buyer information will help you plan your lead inventory for the current and next months.

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| **Note**As scrubs are accounted for in lead counts, you may see available inventory increase. It is therefore important that you check this dashboard view frequently to determine your most recent inventory count. |

Additional dashboard view configuration options include showing/hiding empty rows or unformatted rows, filtering and sorting columns, drilling down to view lead details, or adding a graph to the data table. You can also use conditional formatting to apply colored highlighting to any measure on the view based on data thresholds, allowing you to focus on the most important data at hand (e.g., you may highlight billable lead counts that are below par red and billable lead counts above par green to indicate which channels are performing well and which are under performing for a lead buyer).

## Using a Lead Buyer Dashboard to View Allocations

1. From the navigation menu, select **Views > Lead Buyer Dashboard Views > Lead Buyer Dashboard Template**. This takes you to the Lead Buyer dashboard view.
2. Click **Configure**. The *Configuration* dialog box opens.
3. From the **Date Periods** tab, select the date range for your dashboard view.



1. From the **Columns Included** tab, select the check box beside each measure/column you want to show in the generated view. For example:
	1. To show the number of leads left in your inventory, select the “Lead Count - Available Inventory” check box.
	2. To show the allocations made for the following month, select the “Lead Count - Target Volume Next Month” check box. Note that this measure is often not populated until the end of the month.



* 1. Select Lead Count – Monthly Cap to show your allocation for the current month.
	2. Select Lead Count – Good This Month to show the number of good leads for the current month.
1. From the **Selection Criteria** tab, select the check box beside each type of data that you want to show from the dashboard view. In most cases you will want to leave everything selected, but if you wanted to customize your view (to only show one lead buyer for example) this is where you would do that.
2. If required, you can also:
	1. Drill down on lead counts to view additional detailed information. Clickable lead counts are displayed as underlined numbers in the data table.
	2. Export the data to CSV or XLS formats via the Export CSV and Export XLS buttons.
	3. Sort each column by clicking the column header.
	4. Add conditional formatting.
3. Tosave the view using a new name, click **Save View As** and then follow the prompts.

Congratulations, you have successfully configured your Lead Buyer “pacing” dashboard view!

For further information on this topic please contact support@sparkroom.com.