

# CRlterion® Performance Dashboard

## Real-time Tracking

View snapshot of product sales and loan production in real-time

## Custom Views

View by individual, branch, credit union, loan status, date, etc.

## Increased Productivity

Recognize top performers and easily target training needs

## Integrated Design

Conveniently located on your CRlterion® toolbar

Life Insurance						Disability Insurance					
#	Ins	%	Name	Total \$	With Ins	#	Ins	%	Name	Total \$	With Ins
134	96	72	Debbie	\$1,052,639.68	\$672,05...	12	9	75	Susan	\$40,847.74	\$21,347...
143	1...	73	Lila	\$1,416,718.35	\$896,08...	318	2...	75	Jessica	\$3,561,184.50	\$2,081,...
179	1...	73	Jessica	\$983,569.06	\$557,21...	4	3	75	CRl	\$25,275.00	\$4,275.00
119	89	75	Paula	\$951,718.78	\$590,32...	334	2...	77	Betty	\$3,313,596.15	\$2,187,...
9	7	78	Catherine	\$85,735.65	\$50,460...	143	1...	78	Lila	\$1,416,718.35	\$922,58...
12	10	83	Susan	\$40,847.74	\$24,347...	9	7	78	Catherine	\$85,735.65	\$50,460...
6	5	83	Claudette	\$40,617.78	\$35,617...	6	5	83	Claudette	\$40,617.78	\$35,617...
318	2...	85	Jessica	\$3,561,184.50	\$2,413,...	155	1...	85	Catherine	\$995,851.72	\$741,25...
334	2...	86	Betty	\$3,313,596.15	\$2,516,...	37	32	86	Diane	\$136,091.96	\$102,45...
37	32	86	Diane	\$136,091.96	\$102,45...	90	81	90	Rolanda	\$395,036.18	\$320,24...
155	1...	87	Catherine	\$995,851.72	\$746,55...	1	1	100	Sam	\$72,000.00	\$72,000...
90	84	93	Rolanda	\$395,036.18	\$339,35...	6	6	100	Christina	\$48,000.00	\$48,000...

  

GAP				Auto Warranty			
#	GAP	%	Name	#	Warr	%	Name
28	19	68	Rolanda	63	1	2	KATIE
41	27	66	Ratesha	69	1	1	Catherine
44	31	70	Paula	26	2	8	Miranda
49	33	67	Jessica	28	2	7	Amie
58	33	57	Rhonda	38	2	5	Debbie
42	34	81	Catherine	15	3	20	Sara
67	37	55	KATIE	40	4	10	Paula
50	44	88	Lila	179	6	3	Karen
74	44	59	Catherine	37	6	16	Ratesha
105	76	72	Betty	42	7	17	Catherine
183	92	50	Karen	96	12	12	Betty
116	99	85	Jessica	112	18	16	Jessica

Desktop reporting is an innovative way to have up-to-the-minute sales and performance tracking available on your desktop with CRlterion®. At any time you can track your sales statistics by individual, branch, and for the credit union as a whole. Individuals can track their progress towards their sales goals. Branch managers can evaluate their product sales, loan activity and member service activity at any time and for any given period.

This can be a great tool for immediately recognizing star performers as well as knowing what staff may need additional coaching .

## CRlterion® Performance Dashboard Benefits:

- Real-time view of your product sales and loan production
- Custom sorting based by branch
- Custom loan view
- Custom Member Service Activities
- User selected date range for reporting
- View Individual or credit union statistics
- Ability to sort by status
- Product Sales Performance and Tracking
- Easy-Access on CRlterion® toolbar



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