Partner Manager Dashboard Overview

Last Modified on 07/19/2022 1:28 pm PDT

Sign in to Partner Manager and view the **Dashboard**.

The **Partner Manager Dashboard** is the landing page you access when you first log into Partner Manager. The view is based on your user's access. The dashboard provides an overview of your portfolio, activity over the previous three months and the current month, graphs to view application status and residuals, and data on account status by month. Quick links provide access to detailed report information.

The dashboard sections are described below:

- **Watched Topics**, located on the upper right-hand side, offers a total count of all tracked applications where a trigger event occurred. Select the link adjacent to Watched Topics by clicking the ***number*** to view a report of watched applications. For each application, select ***Alerts*** to see the events triggered, View to navigate to the application, and ***Unwatch*** to remove the tracking of an application.
- Favorite Reports provides access to your saved reports and quick links to any reports you have saved as one of your favorites.
- **Quick Links** provides User Search access to lookup your partner-level and merchant users. Enter a user, then view the User Detail.
- **Activity by Billing Month** provides a tabular view of the previous three months and the current month's trending data: *total accounts*, *active accounts*, *number of sales*, *sales volume*, *credits volume*, *disputes volume*, *disputes ratio*, *average ticket*, *residual*, and *margin*. The previous three months' data is based on billing rather than a calendar month.
- **Applications By Month** displays the last three months of application statuses as *Created*, *Approved*, *Declined*, or *Canceled*. These statuses provide a quick view of how many applications are in what application status. Select the ***3***, ***6***, or ***12-month*** buttons above the chart to change the data view.
- **Application Decisions** provides a pie-chart view by default of the last three months of the statuses referenced in the **Applications By Month** graph. Select the ***3***, ***6***, or ***12-month*** buttons above the chart to change the data view.
- **Merchant Accounts** provides a tiled view of the account statuses by billing month. Select either the Month-to-Date (MTD) or Year-to-Date (YTD) number next to the status you are interested in viewing and access the **Reports** with the associated detailed report.
- **Residual By Month** displays by default the last three months of residuals by billing month. Select the ***3***, ***6***, or ***12-month*** buttons above the chart to change the chartered data view.
- **Residual By Merchant** displays a pie-chart of residual by merchant contribution for the last billing month, providing insight into portfolio concentration.