



User Guide (excerpt)

Using the operations and partner sales dashboards

A plain-language guide for the credit team, the sales team, and managers. It covers what each page answers, how the slicers work, and what the terms mean.

Sample data. All names, organizations, and figures are fictional.

Getting around

Both dashboards open in the Power BI app. The list of pages runs down the dark panel on the left, and selecting a page name opens it. Every page reads from the same data, which is refreshed each morning, and the date at the bottom of the panel shows how current it is.

Hover over any bar, line, or cell to see its exact value. On the Officer scorecards page, selecting an officer's row shows that officer in the cards and charts. To go back to the full picture, use the Reset to default button at the top of the report, which clears every slicer you changed.

Using the slicers

Received from: Apr 2025
Received through: Sep 2026
Channel: All channels
Equipment category: All categories
5,973 applications in selection

Figure 1. The slicer bar at the top of the operations dashboard.

Slicers narrow everything on the page at once, and most of them carry over when you change pages. Changing a slicer never changes the data itself, so you can try different views without any risk.

Slicer	What it does
Received from and through	Limits the view to applications received in those months. Funded volume charts on the sales dashboard use the month the deal funded instead.
Channel	Shows one application source, such as equipment dealers or independent brokers.
Equipment category	Shows one kind of equipment, such as medical or construction.
Credit officer	On the Officer scorecards page, picks the officer to review. Their numbers are compared with officers at the same level.
Sales rep and Partner type	On the sales dashboard, limits every page to one rep's partners or one kind of partner.
List partners scoring below	On the Partner health and outreach pages, sets the health score below which a partner appears on the list.

What each page answers

Operations Workflow Dashboard

Page	Questions it answers
Executive overview	How many applications came in, what share we approved, how long decisions took, what share funded, and how many approvals were reversed.
Application flow	How many applications reach each step from receipt to funding, where the rest left the process, and how each channel converts.
Turn time	How many business days decisions take, and how long complete files wait for a decision near the end of the month.
Document requests	Which documents officers ask for, how long applicants take to send them, and which equipment categories wait longest.
Decisions and reversals	How approvals and declines trend, which officers' approvals are reversed before funding, and why.
Officer scorecards	How each officer's volume, approval rate, reversals, and turn time compare with officers at the same level.
Equipment categories	How volume, approval, turn time, document waits, and funding differ by the kind of equipment financed.

Referral Partner Sales Dashboard

Page	Questions it answers
Sales overview	How many applications partners sent, how many funded, the dollars funded each month, and which partner types convert best.
Rep performance	How each rep's partners compare on submissions, approvals, funding conversion, funded volume, and repeat business.
Partner health	Which established partners score low on activity, funding conversion, recency, or approval rate, and how much business they represent.
Pipeline	How many submissions are approved, sent a contract, signed, and funded, and how much is waiting on a signature.
Partners by state	Where funded volume and submissions come from, and how funding conversion differs by state.
Weekly partner outreach list	A one-page list for each rep's weekly calls, ready to print.

Printing a weekly partner outreach list

1. Open the Weekly partner outreach list page and pick the rep in the Sales rep slicer.
2. Adjust the score threshold if the list is too long or too short. The default lists partners scoring below 45.
3. Choose Export, then PDF, and print the single page. The list leaves room for notes beside each partner.

Glossary

Term	Meaning
Application	A request for equipment financing, whether it came from a partner, the online marketplace, or a direct customer.
Business days	Days counted only from 8:00 AM to 6:00 PM, Monday through Friday, excluding company holidays.
Turn time	Business days from when an application is received to the credit decision.
Complete file	An application with every requested document received, ready for a decision.
Decision wait	Business days from a complete file to the credit decision.
Approval rate	Approved applications divided by decided applications.
Reversal	An approval withdrawn before funding, for example because verification did not match the application.
Reversal rate	Reversed approvals divided by all approvals.
Document request	A request to the applicant for a document, such as an equipment invoice or bank statements.
Document wait	Business days from a document request to receipt of the document.
Funding conversion	The share of applications received that went on to fund.
Funded volume	Dollars paid out on deals. The sales dashboard counts it in the month the deal funded.
Health score	A score from 0 to 100 for each established partner: up to 40 points for activity, 30 for funding conversion, 20 for recency, and 10 for approval rate.
Health bands	At risk is under 45, Watch is 45 to 69, and Healthy is 70 and up.
Repeat customer	A business that has funded with Larkspur before.