Complete Guide to Reports & Analytics

CRM & Leads Version 1.0 Updated 14 August 2026

A beginner-friendly guide to understanding, generating and using property, lead, staff and site-visit reports in Araona Connect - plus which analytics are live today and which are coming soon.

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1. Introduction

Reports turn the everyday activity in Araona Connect - properties added, leads captured, visits scheduled, deals closed - into numbers you can read at a glance. This guide explains what each report shows, how to filter it, and how to use the numbers to make better business decisions. It sticks strictly to what is available today; anything not yet in the product is clearly marked Coming Soon so you always know what to expect.

[Screenshot: Reports Dashboard]

2. Purpose of Reports & Analytics

* See how your business is doing at a glance, without opening dozens of records.
* Spot problems early - stalled leads, unassigned properties, missed follow-ups.
* Measure staff productivity fairly, using the same numbers everyone can see.
* Justify decisions with data - where to spend on marketing, which cities to expand into, who to reward.

Operational reports tell you what is happening right now (open leads, active properties, today's visits). Analytical reports look back over a period to reveal trends (conversion rate this month vs. last month). You will use both.

3. The Reports Dashboard

The Reports Dashboard is the landing page under Admin › Reports. It groups every report into four tiles - Properties, Leads, Staff Performance and Site Visits - and shows the most important number for each at the top (a KPI card). Clicking a tile opens the detailed report with filters, tables and charts.

4. Property Reports

Property reports summarise your listings.

* Total Properties - every listing in your tenant, regardless of status.
* Active Properties - approved and currently visible on your public website.
* Sold Properties - listings marked as sold.
* Rented Properties - listings marked as rented.
* Draft Properties - listings not yet submitted for approval.
* Featured Properties - listings starred to appear on the home page.
* Property Performance - views and enquiries per listing (Coming Soon - depends on Website Analytics).
* Property Status Summary - a bar chart of status counts (Draft / Pending / Active / Sold / Rented / Archived).

[Screenshot: Property Report]

5. Lead Reports

Lead reports are where most tenants spend their time.

* New Leads - leads created in the selected date range.
* Converted Leads - leads marked Converted / Deal Closed.
* Lost Leads - leads marked Lost / Not Interested.
* Lead Sources - where each lead came from (Website form, WhatsApp, Manual, Bulk Upload, Home Loan, Interior).
* Lead Status Distribution - pie chart of New / Contacted / Site Visit / Negotiation / Converted / Lost.
* Lead Conversion Rate - Converted ÷ Total leads, as a percentage.
* Follow-up Performance - leads with an overdue follow-up task versus leads followed up on time.

[Screenshot: Lead Report]

6. Staff Performance Reports

These reports help you measure your team fairly.

* Leads handled by each staff member - how many leads a person is currently assigned.
* Property assignments - properties created or owned by each staff member.
* Site visits completed - visits with a completed outcome, grouped by staff.
* Follow-up completion - percentage of assigned tasks completed on time.
* Productivity overview - a combined score card summarising the above.

[Screenshot: Staff Performance]

7. Site Visit Reports

* Scheduled Visits - visits planned in the future.
* Completed Visits - visits that finished with an outcome recorded.
* Cancelled Visits - visits cancelled by the customer or the team.
* Rescheduled Visits - visits pushed to a later date.
* Customer Feedback - Coming Soon.

8. Website Performance

Website analytics are being built. For now, the following are Coming Soon and do not appear in the product:

* Featured property clicks
* Property views per listing
* Website enquiries funnel
* Search activity on your public site

Until these are released, use the Lead Sources report to understand how much of your CRM activity is coming from the website form and WhatsApp button.

9. Filtering & Exporting Reports

Every report supports the same filter bar at the top:

* Date range - Today, This Week, This Month, Last Month, or a custom range.
* City - restrict to one of the cities enabled for your tenant.
* Locality - narrow further to a specific locality within a city.
* Staff - filter to one staff member (Super Admin only).
* Status / Source - where applicable to the report.

Exports: lists on every report can be exported to CSV and Excel. PDF export is available on selected reports; where it is not shown, treat it as Coming Soon.

[Screenshot: Export Report]

10. Understanding KPIs

A KPI (Key Performance Indicator) is a single number that tells you whether things are going well.

* Lead Conversion Rate = Converted leads ÷ Total leads × 100. A healthy real-estate range is 3–8%.
* Average Response Time = average minutes between a lead being created and its first status change. Under 30 minutes is excellent.
* Property Occupancy (for rentals) = Rented ÷ (Active + Rented). Higher is better.
* Sales Performance = number of leads marked Converted / Deal Closed in the period.
* Staff Productivity = leads handled + visits completed + follow-ups on time, per staff member.

Compare KPIs across periods (this month vs. last month) rather than looking at a single number in isolation.

11. Step-by-Step Guide

Generating a weekly lead report:

1. Open Admin › Reports › Leads.
2. Set the date range to This Week.
3. Optionally filter by a city or staff member.
4. Read the KPI cards at the top (New / Converted / Lost / Conversion Rate).
5. Click Export › CSV to share with your team.

12. Best Practices

* Review the Reports Dashboard every Monday morning - 10 minutes is enough.
* Look at the same report for the previous period side by side; the trend matters more than the number.
* Share the weekly lead export with your sales team so everyone works from the same numbers.
* Use the Follow-up Performance report to coach staff whose tasks slip.
* Feature only high-performing listings on the home page - starred properties should earn their spot.

13. Tips & Recommendations

* Pin the reports you use most often as browser bookmarks with pre-set filters in the URL.
* Always double-check the date range before drawing a conclusion - a "quiet week" is often a wrong filter.
* When comparing staff, filter to the same date range and the same city so the comparison is fair.
* Export to CSV and open in Excel/Google Sheets when you need custom charts or pivot tables.

14. Common Mistakes

* Using incorrect date filters - comparing 30 days against 7 days makes performance look worse than it is.
* Comparing incomplete data - reading Monday morning’s numbers as a "full week".
* Ignoring follow-up reports - most lost deals hide here first.
* Misinterpreting KPIs - a low conversion rate with high lead volume is not the same problem as a high conversion rate with almost no leads.
* Judging staff on lead count alone - quality and follow-up matter more than raw volume.

15. Troubleshooting

Why is my report empty? Usually a filter is too narrow. Reset the date range to This Month and clear city/staff filters.

Why can’t I export? Only Super Admins and staff with the Export permission can export. Also check that the report currently has rows to export.

Why are totals different between two reports? Different reports count different things. For example, "Active Properties" excludes drafts and archived listings, while "Total Properties" includes everything.

Why are some properties missing from a city report? Only properties tagged with that city appear. Open the property and confirm the city field is set correctly.

Why is my conversion rate showing 0%? No leads have been marked Converted in the selected period. Check the Lead Status Distribution - you likely have conversions in a different date range.

16. Frequently Asked Questions

Are reports live or delayed? Live. Every action in the CRM shows in reports immediately.

Can staff see everyone’s numbers? No. Non-Super-Admin staff see only reports scoped to their assignments and cities.

Can I schedule reports by email? Not yet - Coming Soon.

Can I build my own custom report? Custom report builder is Coming Soon. For now, export to CSV and build in Excel/Sheets.

Are website visitor analytics included? Not yet. See Website Performance above.

Do reports include archived leads? No, unless you specifically filter status to Archived.

Can I compare two custom date ranges side by side? Side-by-side comparison is Coming Soon; for now, export both and compare in a spreadsheet.

17. Related Articles

* Complete Guide to Property Management
* Complete Guide to Lead Management
* Complete Guide to Staff, Roles & Permissions
* Complete Guide to Platform Owner & Tenant Administration
* Complete Guide to Subscription, Plans & Billing