Here’s a thorough, plain‑English tour of how each part of EliteKPI works and where the numbers come from.

How the app is structured

* Navigation/layout: A left sidebar links to each tab. The main area shows the selected page. The layout injects a consistent theme and mobile-friendly sidebar toggle.
* Data model: Everything you enter is stored in app “entities”:
  + Property (pipeline records + prices + status + representation\_type + commission\_rate + loss reasons/insights)
  + Commission (amount, rate, date, type, property\_id)
  + Expense (property\_id, category, amount, date, notes)
  + TimeEntry (property\_id, activity, hours, date)
  + CMA (market analyses with value ranges, status, and notes)
  + Showing (showings with feedback, mileage, gas, time)
  + Activity + ActivityActual (event logs and daily totals for goals)
  + MileageLog (general mileage, optional property\_id)
  + User (your defaults: hourly rate, MPG, gas price, commission split)
* Security: Every record is scoped to its creator (read/write permissions tied to your account).

Dashboard

* What it loads: Properties, Activities, TimeEntries, Commissions, Expenses, MileageLogs, CMAs, Showings.
* Key metrics and how they’re calculated:
  + Total Revenue: Uses Commission records for CLOSED properties; if a closed property has no commission record, it falls back to property fields:
    - For buyer rep: accepted\_price (or sold\_price) × commission\_rate%.
    - For seller rep: sold\_price × commission\_rate%.
  + Total Volume: Sum of closed property sold prices (falls back to listing\_price if sold\_price missing).
  + Properties Closed: Count of properties with status = closed.
  + Active Listings / Under Contract / Pending: Counts by status; tiles link into the Properties page section via anchors.
  + Under-Contract/Pending Values: Sum of listing\_price (seller) or offer/accepted price (buyer) depending on status.
  + This Month Revenue: Sum of commission\_amount for closed properties where date\_earned is in current month.
  + Avg Transaction Period: Avg days between listing\_date and sold\_date across closed deals.
  + Buyer Offer Ratio: Avg (sold\_price / listing\_price) for buyer-side deals that have both values.
  + Conversion Rate: (buyer\_signed + listing\_taken) / (buyer\_appointment + listing\_appointment).
  + Average Commission Rate: Average of Commission.commission\_rate across commission records; if none, it falls back to property commission\_rate on closed properties.
  + Offer Acceptance Rate: Robust inference:
    - Counts “offers written” from Activities (offer\_written) OR from buyer-rep properties that show progress (offer set, or status in offer\_written/active\_under\_contract/pending/closed).
    - Counts “offers accepted” from Activities (offer\_accepted) OR buyer-rep properties that have accepted\_price or status in active\_under\_contract/pending/closed.
  + ROI Performance: (Total revenue − total expenses) / total expenses.
  + Revenue per Hour (Insights card): Sums revenue like above for closed properties, then divides by YTD hours from TimeEntries (matches Monthly Efficiency logic).
* Visuals:
  + Metric tiles for sales and activity.
  + Revenue/Expenses/Time charts, Efficiency chart.
  + Performance Insights card that summarizes items like call answer rate, listing conversion, avg commission rate, and revenue per hour, with guidance.
* Quick tax estimate: You can slide a tax rate; it multiplies rate × Total Revenue for a YTD estimate.

Performance

* Data sources: Properties, Activities, ActivityActual, Expenses, TimeEntries.
* Activity merge: Blends legacy Activity events with ActivityActual (logged daily totals) so metrics are comprehensive.
* Sections:
  + Efficiency Score: Composite of key indicators across pipeline, time, and spend.
  + Performance Recommendations: Actionable AI-style suggestions based on your current data.
  + Buyer/Seller Metrics: Appointments → agreements, and other conversion rates.
  + Call Efficiency: Answer rate and trends based on activities (client\_call, call\_answered, call\_missed).
  + Property ROI dropdown + Overall ROI: Drill into cost vs. return by property and overall.
  + Price Analysis chart: Listing vs. sold price patterns and spreads.

Properties

* Pipeline view: Everything is grouped by status into collapsible sections (In Progress, Listed, Offer Written, Under Contract, Pending, Closed, Lost, etc.).
* Each card shows:
  + Representation (Buyer Rep or Seller Rep), core facts (beds/baths/sq ft/type), client, and a status dropdown.
  + Buyer-side fields: Offer Price, Accepted Price (when relevant), optional “Add” actions if blank.
  + Seller-side fields: Listed Price.
  + Commission Earned (from Commission entity totals for the property).
  + Investment: Expenses + time value (time entries × your default hourly rate).
  + ROI: (Commission − Investment) / Investment, with net profit and color-coded arrows.
  + Offer Ratio (buyer): sold/listing price.
  + Referral fee (if present).
* Actions and flows:
  + Changing status to closed prompts for the sold price (if missing) and records sold\_date.
  + Changing status to lost\_deal prompts for a reason; generates and saves improvement insight.
  + “Accept Offer” button on offer\_written moves property to active\_under\_contract and logs an offer\_accepted Activity automatically.
  + “Details” opens a modal with full financials and logs (expenses, time, commissions).
  + “Add” dialogs allow entering Offer Price and Accepted Price when needed.
  + Add Property uses a form that can accept CMA data to prefill listing details.

Showings

* Add Showing dialog:
  + Fields: property\_address (with search), client name, date, interest\_level, duration\_minutes, miles\_driven, gas\_cost (auto-calculated), hours\_spent, feedback, internal notes, follow-up checkbox. All are black text with outlined inputs.
  + Gas cost auto-calc: Uses your User defaults (avg\_gas\_price and vehicle\_mpg) × miles\_driven to estimate cost; you can override if needed.
* Showings feed the Dashboard “Total Showings” and can be converted into a Property record (via other flows).

CMAs

* Create, track, and convert Comparative Market Analyses:
  + Fields include suggested list price, low/high estimates, notes, and status (completed, presented, converted\_to\_listing, rejected, did\_not\_convert).
  + Summary counters show totals, converted, completed (not converted), and did not convert.
  + “Convert to Listing” opens the property form with the CMA’s data prefilled; converting sets the CMA to converted\_to\_listing.
  + “Did Not Convert” marks the CMA accordingly; you can later “Reactivate” (revert to active state).
  + Notes allow rationale and comparables you can refer to later.

Reports

* Card menu opens each report full-screen with a print-friendly mode:
  + Sales Report: Listing vs sold, transaction timelines.
  + Commissions Report: Earnings by property/date/type.
  + Expense Report: Costs by property and category/date.
  + Time Log Report: Hours by property and activity type.
  + Category Analysis: Breakdown of time and expenses by categories.
  + Comprehensive Report: A curated summary across revenue, expenses, hours, properties, and timelines for a selected period.
* You can print or save as PDF; the print stylesheet hides navigation and uses black text.

Goals

* Targets:
  + Set per-activity targets (calls, appointments, CMAs, hours, offers to write, monthly closings) with a period (daily/weekly/monthly).
  + Locking: You can lock goals for the period (disables editing) and unlock when you want to change them.
* Actuals:
  + Log daily “ActivityActual” counts that roll into comparisons versus targets.
* Visuals:
  + Daily Activity Tracker and Goal Comparison show progress vs. plan.

GCI Calculator

* Quick calculator for expected commission on a sale:
  + Inputs: sale price, commission rate, and your split.
  + It preloads your default commission split from Settings.
  + Shows total commission and your take-home.

Settings

* User defaults that power calculations:
  + Vehicle MPG and average gas price: used to auto-calc showing mileage costs.
  + Default hourly rate: used to value your time in ROI and properties.
  + Default commission split: used by the GCI calculator.
* Additional utilities include data import/reset components (where available).

Help

* A tabbed guide to every section:
  + Tabs wrap neatly and never overlap the content.
  + Each tab explains “What it is” and “How to use it,” with bullet-point walkthroughs.

Important calculation consistency you benefit from

* Revenue source of truth: Commissions for closed properties are primary; property-level commission\_rate calculations are only used as fallback if no commission record exists.
* Offer Acceptance Rate: Doesn’t require you to log activities; it infers acceptance from buyer-rep deal progression (accepted\_price/under contract/pending/closed).
* Average Commission Rate: Unified across the app using the same logic (commission records first, then fallback to property rates).
* Revenue per Hour: Matches the Monthly Efficiency chart by using the same revenue sources and YTD hours from TimeEntries.

Common workflows

* Buyer offer accepted: Set Accepted Price (or click Accept Offer). Status moves to Under Contract, an activity is logged, acceptance rate updates, and ROI/commission rollups reflect the change.
* Closing a deal: Change status to Closed; if sold price isn’t set, you’ll be prompted to enter it; Dashboard, ROI, and reports update immediately.
* Tracking costs and time: Add expenses and time entries on the property; Dashboard and ROI tiles update; reports reflect the breakdowns.
* Setting goals and tracking: Define daily/weekly/monthly targets; log actuals; use the comparison visuals to adjust your activity mix.

If you want, I can add an in-app “How it’s calculated” tooltip next to key metrics explaining the exact formulas used on your data.