



Wholesaler Performance Dashboard

Sales by Wholesaler

Charles Lewis	\$0.84M
Robert Hernandez	\$0.55M
Chris Taylor	\$0.54M
Tom Brown	\$0.49M
Rachel Miller	\$0.48M
Susan Moore	\$0.47M
John Doe	\$0.46M
Mike Johnson	\$0.43M
Jane Smith	\$0.42M
Linda Anderson	\$0.40M

Sales Vs Compensation



Wholesaler Name

Select all

Amy Martinez

Charles Lewis

Region

Select all

East

North

Line Of Business

Select all

Investments

Life Insurance

Sales by Region and Channel

Region	Broker-Dealer	Direct	Financial Advisor	Total Sales
East	\$9,45,286	\$11,40,090	\$11,56,830	\$32,42,205
West	\$11,13,141	\$7,30,304	\$6,35,484	\$24,78,929
North	\$5,64,782	\$5,72,192	\$6,11,488	\$17,48,463
South	\$82,236	\$94,336	\$2,22,695	\$3,99,267
Total Sales	\$27,05,446	\$25,36,922	\$26,26,496	\$78,68,864

Sales by Business Area



Wholesaler Details

Wholesaler ID	Wholesaler Name	Region	Role	Line Of Business	Sum of Total Sales	Bonus Eligible	Sum of Compensation Amount
W001	John Doe	East	External	Life Insurance	\$4,59,007	N	\$6,329
W001	John Doe	East	External	Life Insurance	\$4,59,007	Y	\$33,242
W002	Jane Smith	West	External	Investments	\$4,21,839	N	\$0
W002	Jane Smith	West	External	Investments	\$4,21,839	Y	\$42,184
W003	Mike Johnson	North	External	Retirement Services	\$4,34,619	N	\$10,164
Total					\$78,68,864		\$7,13,375



Wholesaler Performance

Wholesaler Details





Wholesaler Details Dashboard

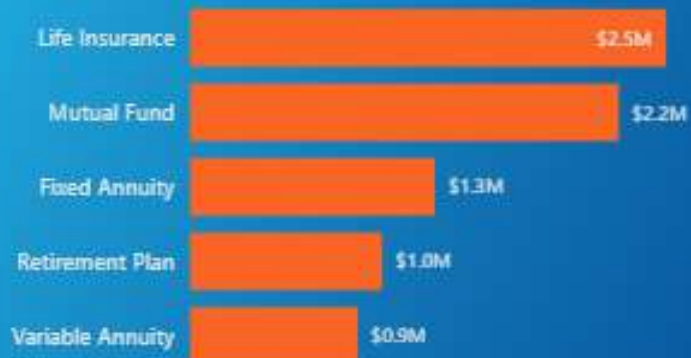
Monthly Sales and Compensation

Wholesaler ID	Wholesaler Name	Year	Month	Sum of Total Sales	Sum of Compensation Amount
W001	John Doe	2023	January	\$4,59,007	\$747
W001	John Doe	2023	February	\$4,59,007	\$0
W001	John Doe	2023	March	\$4,59,007	\$0
W001	John Doe	2023	April	\$4,59,007	\$0
W001	John Doe	2023	May	\$4,59,007	\$0
W001	John Doe	2023	June	\$4,59,007	\$1,882
W001	John Doe	2023	July	\$4,59,007	\$17,919
Total				\$78,68,864	\$7,13,375

Monthly Compensation



Sales by Product Type



Product Details

Wholesaler ID	Wholesaler Name	Product ID	Product Type	Channel	Sum of Total Sales	Sum of Compensation Amount
W001	John Doe	P005	Life Insurance	Direct	\$24,920	\$39,572
W001	John Doe	P006	Retirement Plan	Broker-Dealer	\$93,723	\$39,572
W001	John Doe	P006	Retirement Plan	Direct	\$5,139	\$39,572
W001	John Doe	P006	Retirement Plan	Financial Advisor	\$81,675	\$39,572
W001	John Doe	P008	Life Insurance	Financial Advisor	\$14,932	\$39,572
W001	John Doe	P012	Life Insurance	Broker-Dealer	\$37,640	\$39,572
W001	John Doe	P012	Life Insurance	Direct	\$71,553	\$39,572
Total					\$78,68,864	\$7,13,375



Wholesaler Performance

Wholesaler Details

