Vellumica

REPORTING GUIDE

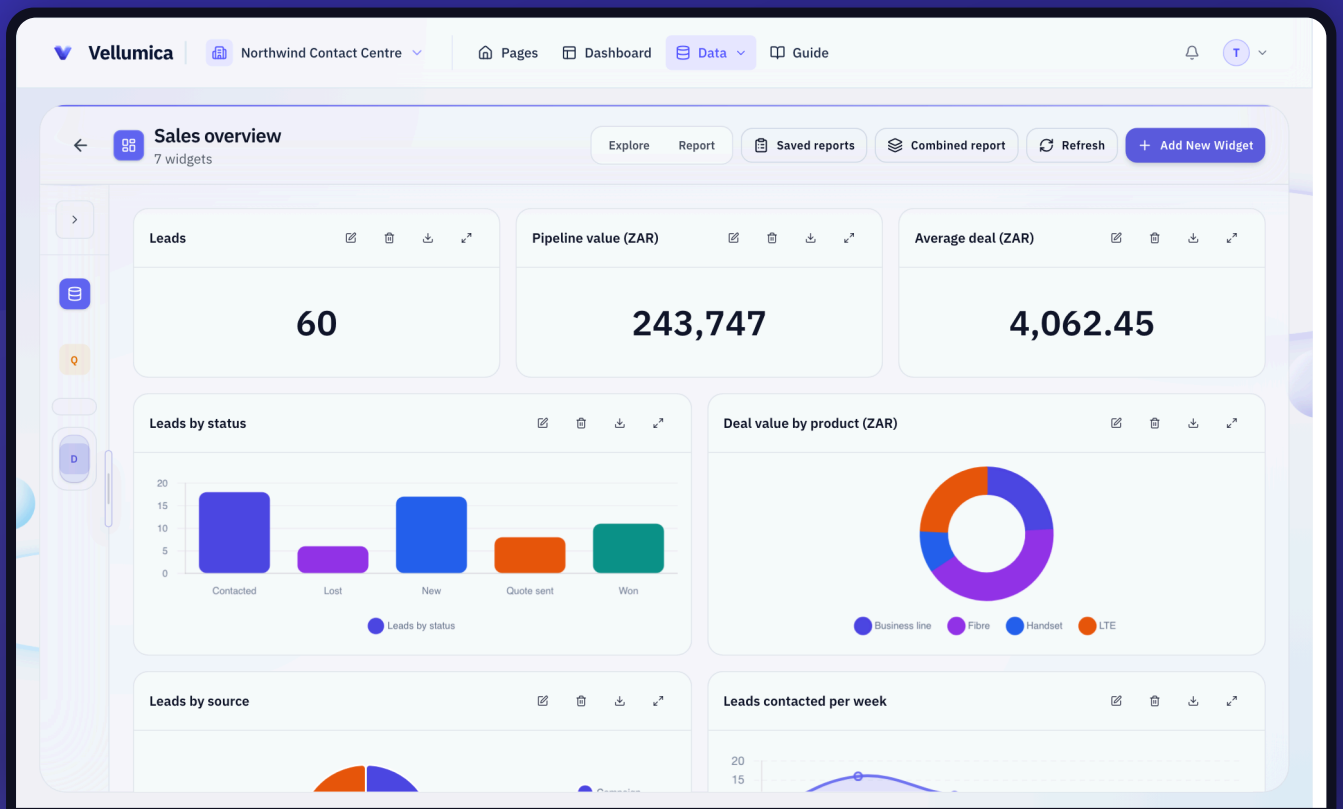
Understand your system. Report with confidence.

How Vellumica is organised, and how to turn your records into answers: reports, dashboards, combined reports and exports. Includes the sales, disposition and rejection reports your management uses. A guide for managers.

How the system works | **Reports** | **Dashboards** | **Your management reports**

vellumica.app

Guide version 1.0 | November 2026



WELCOME

How to use this guide

Read Part 1 first (about 10 minutes). It explains how the system is built, so Part 2, the step-by-step reporting guide, makes sense straight away. Part 3 then builds your own management reports, one at a time.

What you will be able to do after this guide

- Find any app, open it and look at the same records in different ways.
- Answer a question such as "how many leads do we have per status?" or "what is the total deal value per product this year?" in under a minute.
- Save a report and reopen it next week with the numbers already updated.
- Build a dashboard for your team meeting and download the data to Excel.
- Check that a number is right before you quote it.
- Build the reports your management uses: sales by salesperson and stage, the disposition report and the rejection report (Part 3).

About the screenshots

The screens in this guide come from a sample workspace called "Northwind Contact Centre" with one app, Sales Leads, and 60 made-up leads. Your workspace has its own apps and numbers, but the screens, buttons and steps are the same.

PART 1

Understand the system

1.1 The big picture in one minute

Everything in Vellumica sits inside four layers. Each layer contains the next one.

Workspace
Your company's space. It holds your people, your apps and your settings. Most people belong to one workspace.

Apps
One app for each thing you keep track of: for example Sales Leads, Customers or Complaints.

Records
One record is one item in an app: one lead, one customer, one complaint. Think of it as one row in a spreadsheet.

Fields
The details kept on every record: name, status, source, deal value, date. Think of them as the columns of the spreadsheet.

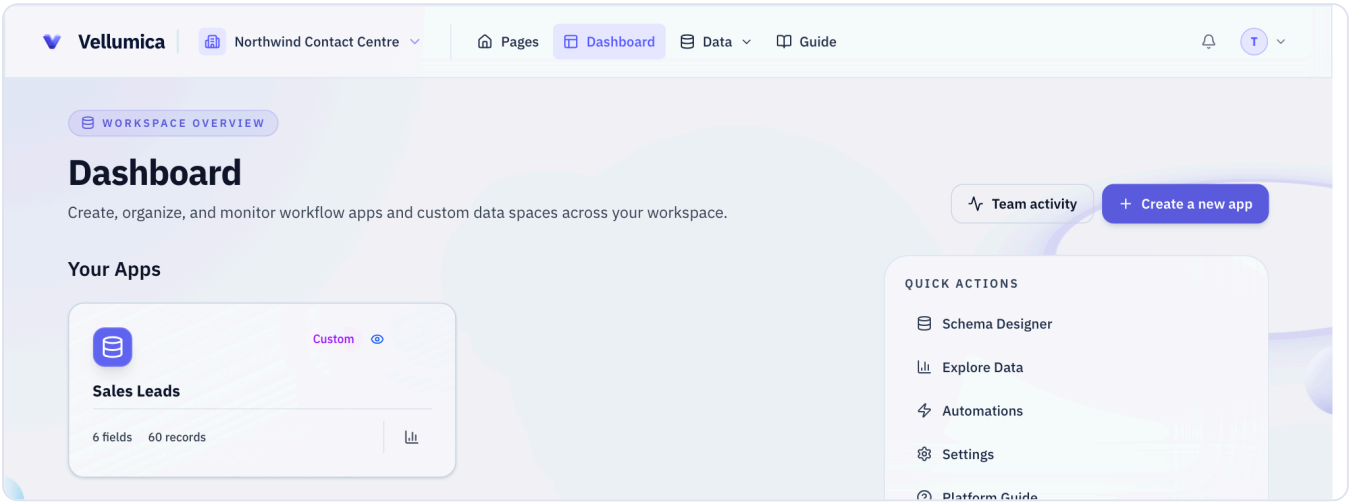
Reports do not hold their own data. A report reads your records and counts, adds up or groups them. When a record changes, every report that uses it changes too, so the numbers are always current.

1.2 Words you will see

Word	What it means
Workspace	Your company's space in Vellumica. The name is shown at the top left. Click it to switch workspace if you belong to more than one.
App	A list of records of one kind, for example Sales Leads.
Record	One item in an app, such as one lead.
Field	One detail on a record. A field has a type: text, dropdown (a fixed list of choices), money, date, or a person.
View	A way of looking at the same records: as a list, a table, a calendar or a board.
Report	An answer to one question, such as a count or a total, grouped and shown as numbers and a chart.
Dashboard	A page of small report cards ("widgets") that you check regularly.
Member and role	A person in the workspace and what they are allowed to do (see 1.5).

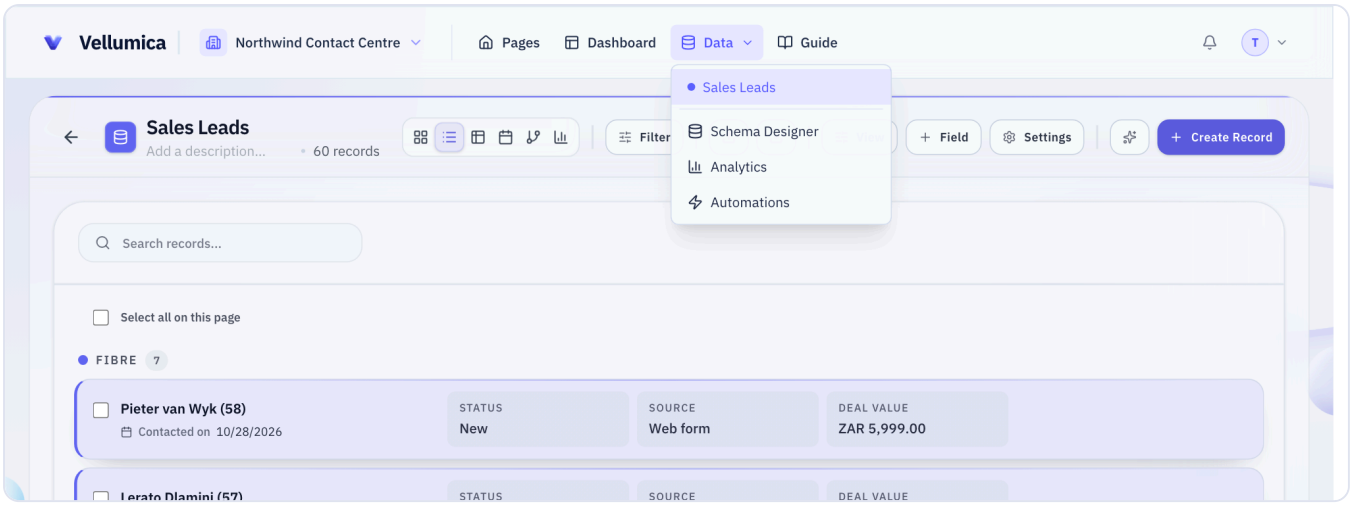
1.3 Finding your way around

After you sign in, the **Dashboard** page lists your apps. Each card shows the app's name, how many fields it has and how many records it holds.



The Dashboard page. The top bar has the workspace name, Pages, Dashboard, Data and Guide. The small chart icon on an app card opens that app's reports.

The **Data** menu in the top bar lists every app and two shortcuts you will use: **Analytics** (where reports live) and **Schema Designer** (where an administrator changes an app's fields).



The Data menu, open above the Sales Leads app in List view. Choose an app to open its records, or Analytics to open reports. In the app, **Search records** finds a record, **Filter** narrows the list and **Create Record** adds one.

1.4 Opening an app and looking at its records

Click an app to see its records (the screenshot above shows one). The row of small icons next to the app name changes how you look at the same records: **Board**, **List**, **Table**, **Calendar**, the app's structure, and charts. Nothing is copied or changed when you switch; it is only a different way of seeing the same data.

1.5 Who sees what

People in a workspace have a role. The role decides what they can do.

Role	Can do
Owner	Everything, including billing.
Admin	Manage people and settings. Billing only if the owner switches it on for that admin.
Member	Create and edit apps and records.
Viewer	Read only.

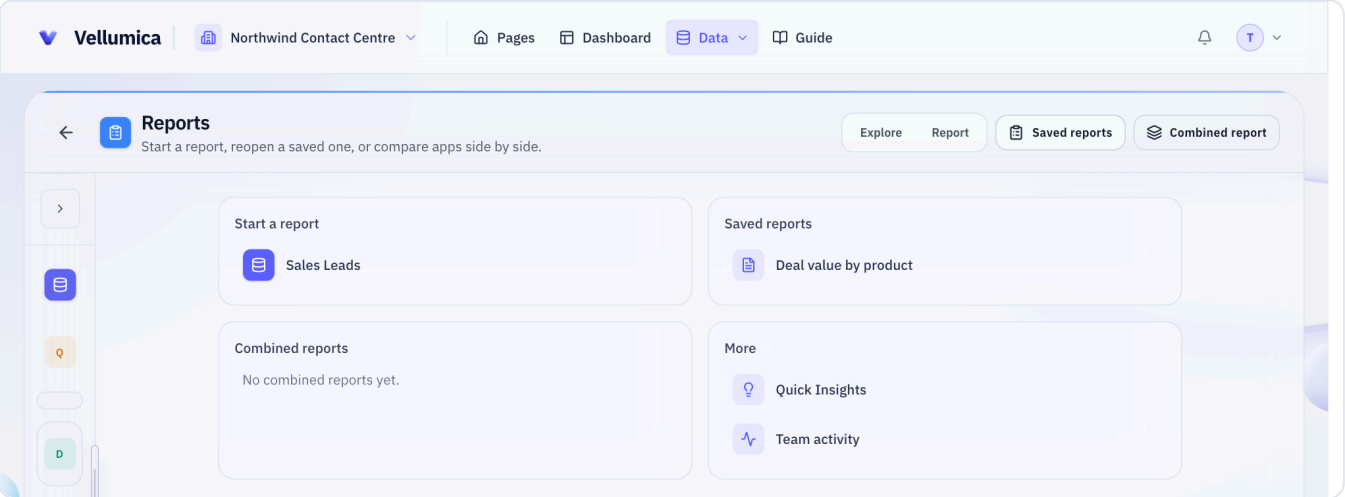
> **The most important rule for reporting**
> Two things decide which records a person sees: whether they have access to the app, and the workspace's **record visibility** setting (for example "members only see records assigned to them"). Reports follow the same rule, so **a report only counts the records the person who opens it is allowed to see.** If two people open the same report and the numbers differ, this is the first thing to check. An administrator can see exactly what any member sees under **Settings**, **App access**, **Preview access as a member**.

PART 2

Reporting, step by step

2.1 Where reports live, and which tool to use

Open **Data** then **Analytics**. The page is called **Reports**. It has four boxes: **Start a report** (one entry for each app), **Saved reports**, **Combined reports** and **More** (Quick Insights and Team activity).



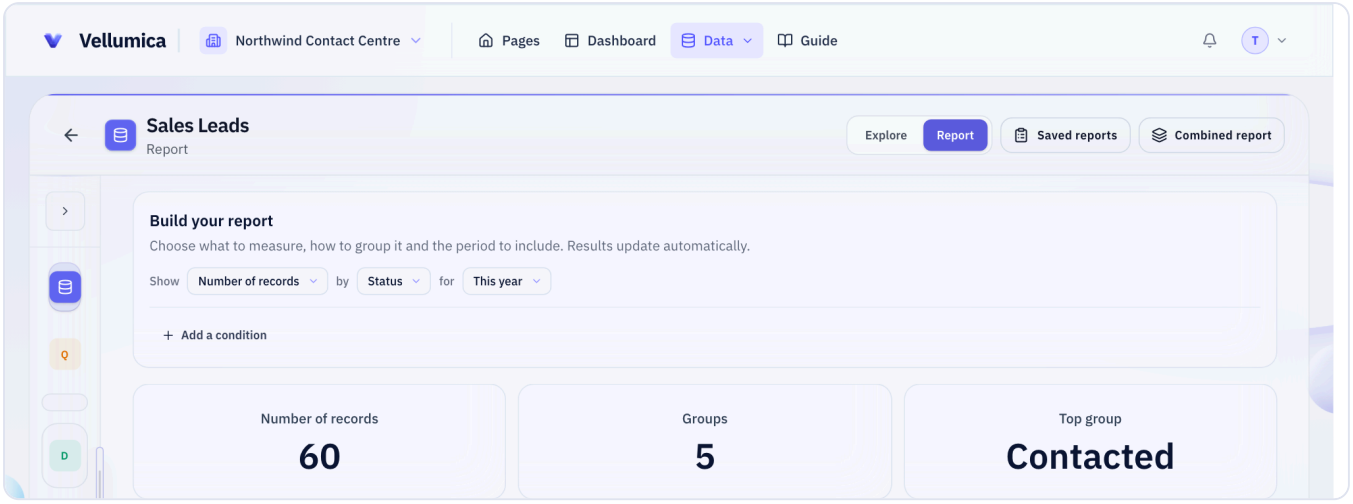
The Reports page. At the top right: **Explore** and **Report** (two ways of looking at one app), **Saved reports** and **Combined report**.

I want to…	Use	What you get
Answer one question quickly (a count, a total or an average, grouped by something)	**Report**	Numbers, a chart and a table. Results update as you choose.
Look at the records behind a number, filter them and download them	**Explore**	A table of the app's records with Filters, Metrics and Groups.
Come back to the same report next week	**Saved reports**	Your saved report, always with current numbers.
Put numbers from several apps on one page	**Combined report**	A scorecard with a chart for each kind of number.
Keep a live page for the team meeting	**Dashboard**	A page of widgets: numbers, charts, tables and notes.
See who did what and the hours worked	**Team activity**	Changes and clock-ins for each person.

2.2 Build your first report

The question: how many leads do we have in each status?

1. Open **Data** then **Analytics**. Under **Start a report**, click the app, for example **Sales Leads**.
2. At the top right, click **Report**. The **Build your report** box appears. It reads like a sentence: **Show … by … for …**
3. **Show** chooses what to measure. Keep **Number of records** to count records. The other choices are **Total**, **Average**, **Lowest** and **Highest**; these need a number or money field (see 2.3).
4. **by** chooses how to group the answer. Choose **Status**. (**Nothing (one total)** gives a single number.)
5. **for** chooses the period: **All time**, **This month**, **Last month**, **Last 30 days** or **This year**. The period uses the app's date field (the first one in the app; in Sales Leads it is "Contacted on").
6. Read the result under the box. There is nothing to press: it updates every time you change a choice.



"Show Number of records, by Status, for This year". The three tiles are the number itself, how many groups there are, and the biggest group.

Reading the result

- **Three tiles:** the number you asked for, **Groups** (how many different statuses were found) and **Top group** (the biggest one).
- **Chart:** switch between **Bar**, **Line** and **Pie**. **Save image** downloads the chart as a picture for a slide or an email.
- **Details:** the same answer as a table. **Columns** chooses which columns to show and **Export CSV** downloads the table for Excel.

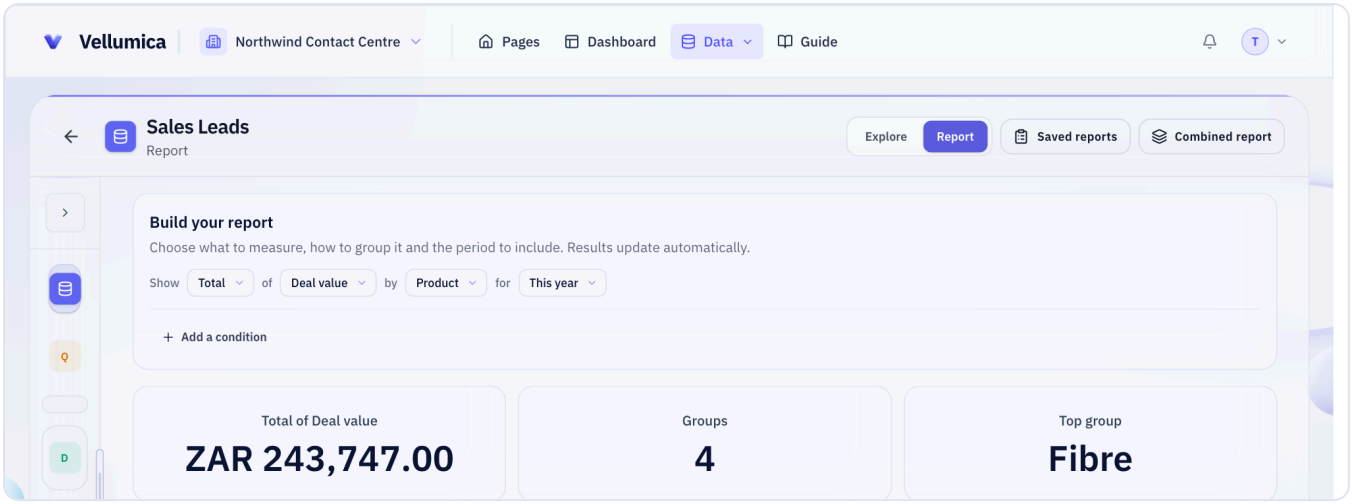
In the sample workspace the answer is: Contacted 18, New 17, Won 11, Quote sent 8 and Lost 6, which add up to the 60 leads.

2.3 Totals and averages (money and number fields)

The question: what is the total deal value for each product this year?

1. In **Show**, choose **Total**. A second box appears. Choose the field to add up, here **Deal value**. Only number and money fields are listed.

2. In **by**, choose **Product**. In **for**, choose **This year**.



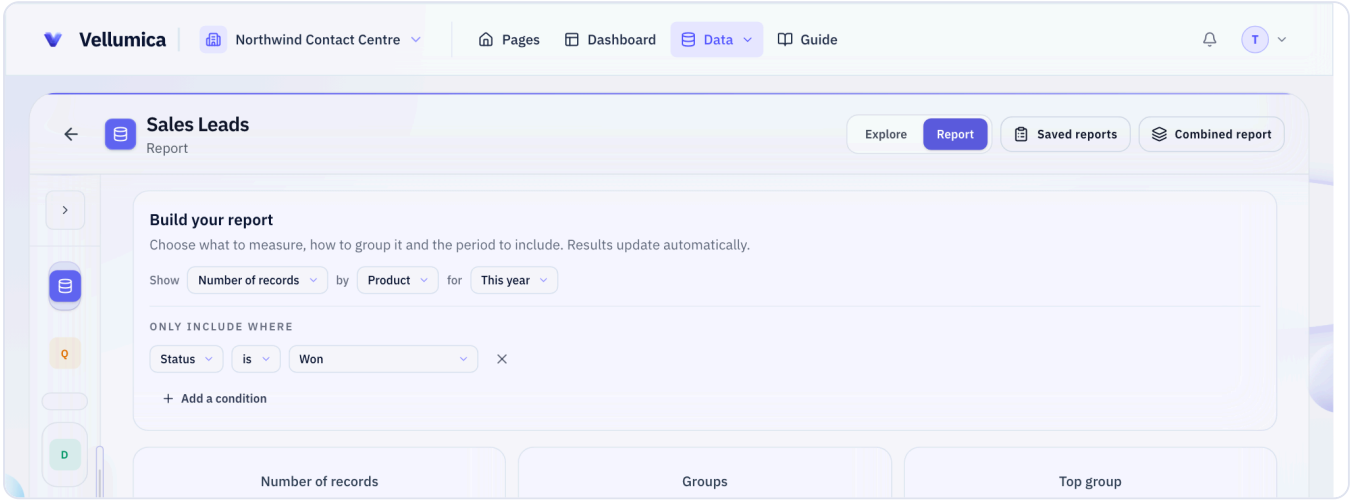
"Total of Deal value, by Product, for This year": R243,747 in total. By product: Fibre 101,270, LTE 59,085, Business line 58,800 and Handset 24,592.

Average, **Lowest** and **Highest** work the same way. For example, choose **Average** with **Deal value** to see the average deal size.

2.4 Narrow the report with a condition

The question: how many leads did we win, and for which product?

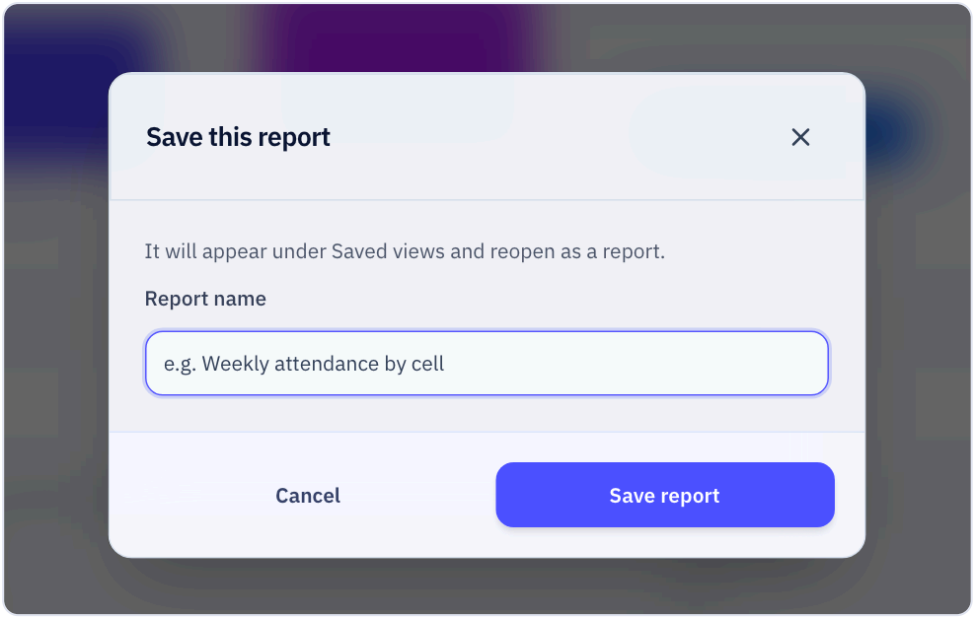
1. Click **Add a condition**. A line appears under **Only include where**.
2. Choose the field (**Status**), then how to compare it, then the value (**Won**). The ways to compare are **is**, **is not**, **is one of**, **contains**, **is empty** and **is not empty**.
3. Add more conditions the same way; each one narrows the report further. Remove one with the small × beside it.



"Number of records, by Product, only where Status is Won": 11 won leads, most of them Fibre.

2.5 Save a report and open it again

1. Scroll to the bottom of the report and click **Save report**.
2. Type a clear name, for example "Deal value by product", and click **Save report** again.
3. Next time, open **Data** then **Analytics** and click the report under **Saved reports**. It opens with up-to-date numbers.

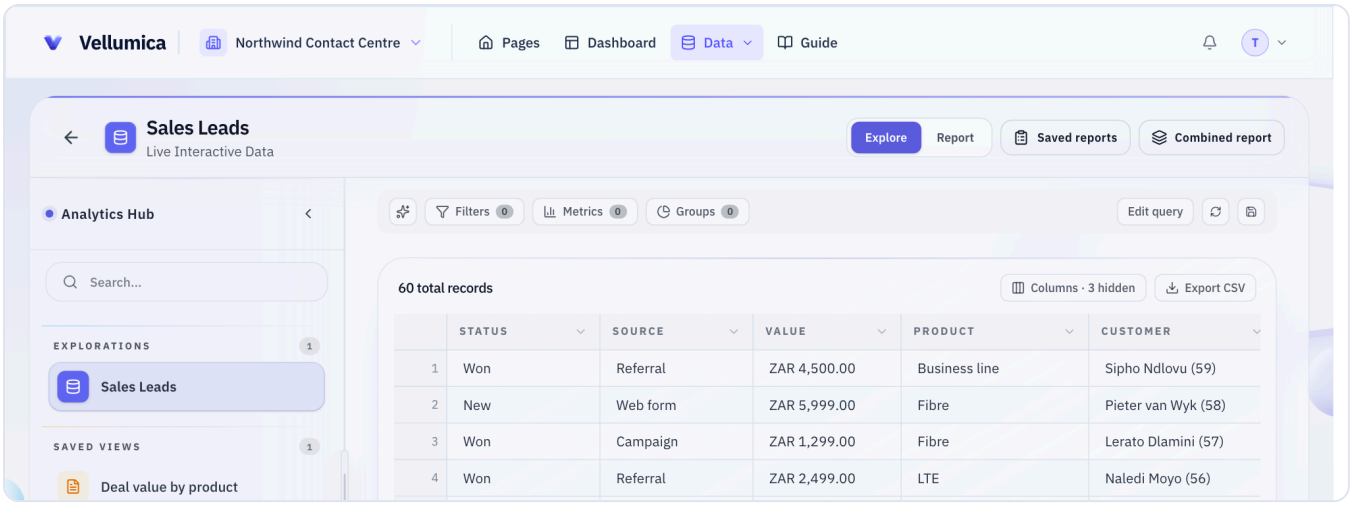


The Save this report window. The example text in the box is only a hint; type your own name.

2.6 Explore: see the records behind the numbers

When someone asks "which leads are these?", use **Explore**. It shows the app's records as a table, so you can see the detail behind any number.

1. Open **Data** then **Analytics**, click the app, and stay on **Explore** (top right).
2. Use **Filters** to keep only the records you want, **Metrics** to calculate a number and **Groups** to split the records by a field. The small number on each button shows how many are in use.
3. Use **Columns** to hide or show columns, and **Export CSV** to download the table.

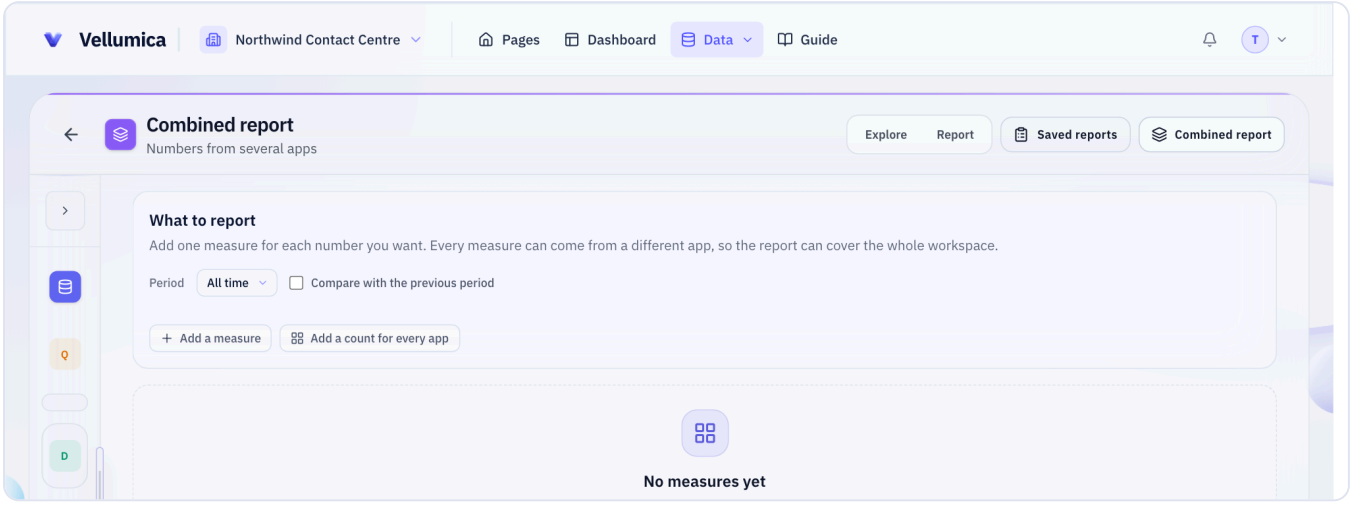


Explore. The left panel (the Analytics Hub) lists the explorations, saved views, combined reports and dashboards.

2.7 Combined report: one page for several apps

A combined report brings numbers from different apps onto one scorecard, for example leads from one app and complaints from another.

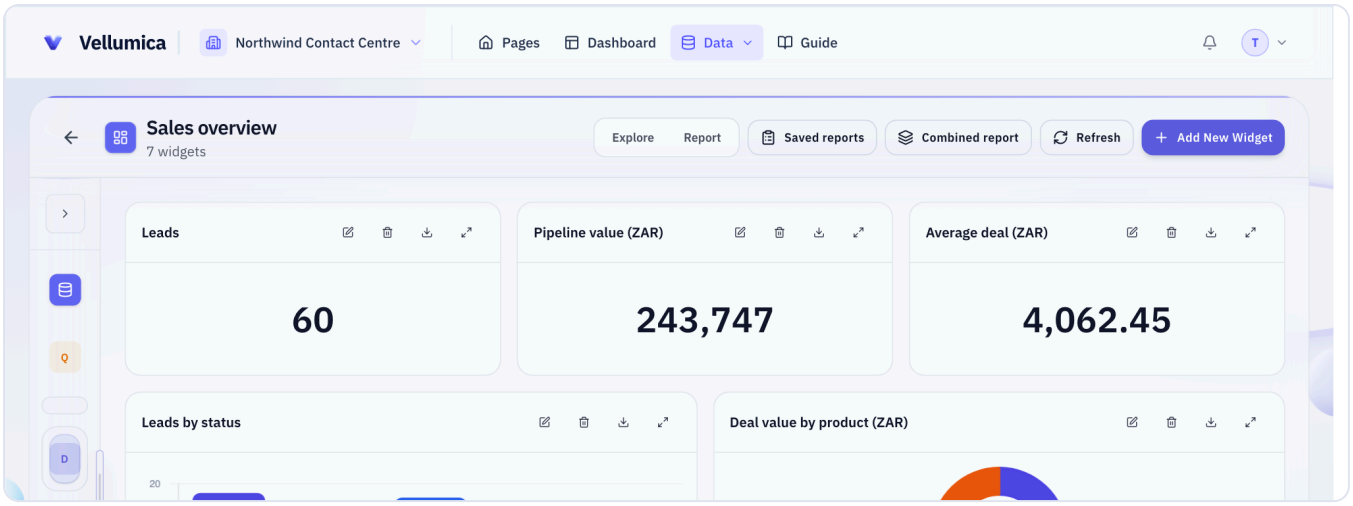
1. On the Reports page, click **Combined report** (or the **+** next to Combined reports in the left panel).
2. Choose the **Period**. Tick **Compare with the previous period** to see change against the period before.
3. Click **Add a measure** for each number you want. Each measure can come from a different app. **Add a count for every app** adds a record count for all your apps at once.
4. Click **Save combined report** and give it a name.



The combined report builder. Measures you add appear below as a scorecard with a chart for each kind of number.

2.8 Dashboards: a live page for your meeting

A dashboard is a page of widgets. Each widget is a number, a chart, a table or a note, and it reads live data. Open it before a meeting and the figures are current.



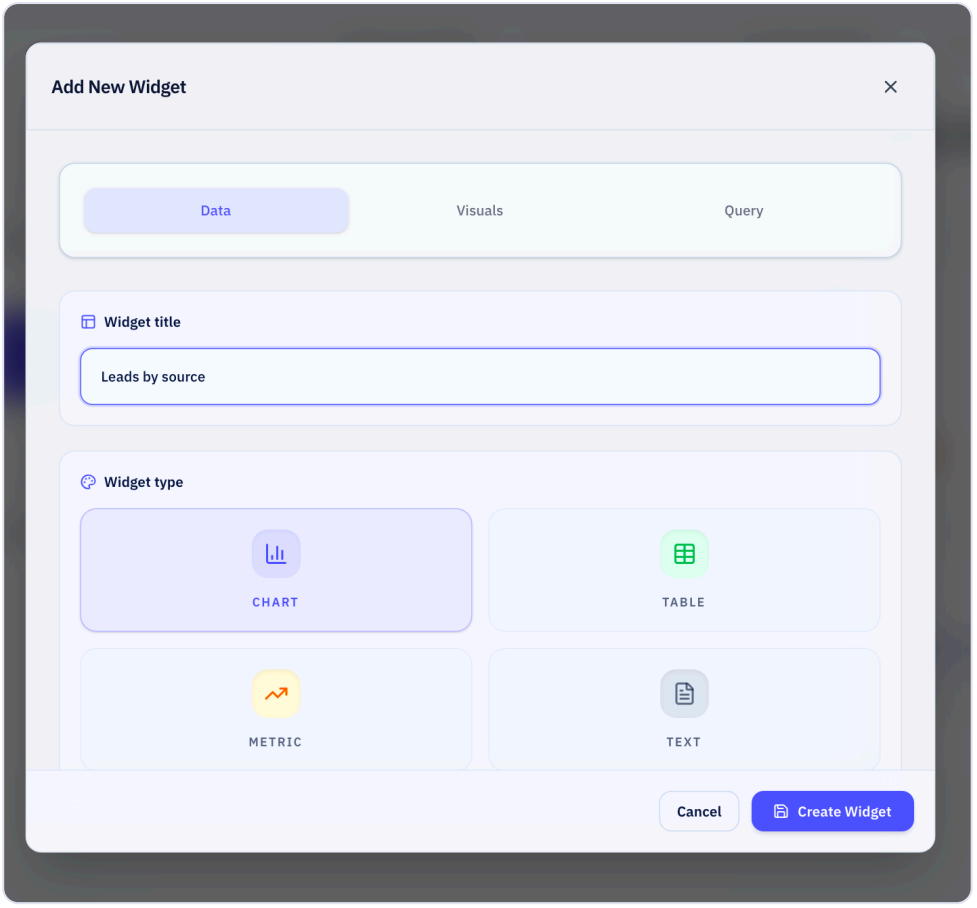
A "Sales overview" dashboard: leads, pipeline value and average deal at the top, then charts by status, product, source and week. **Refresh** reloads the latest numbers.

Create a dashboard

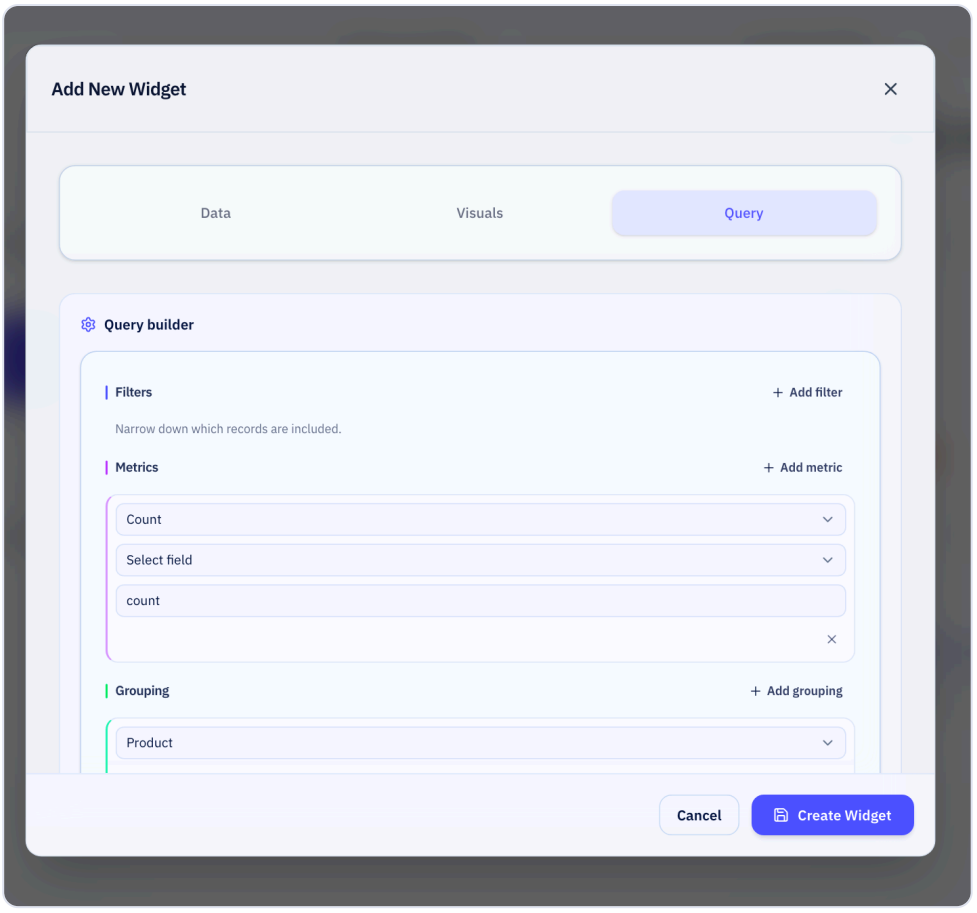
1. On the Reports page, click the small arrow at the left to open the **Analytics Hub** panel. Next to **Dashboards**, click **+**.
2. A new dashboard called "New Dashboard" opens. Type a new name for it.
3. Click **Add New Widget** (top right).

Add a widget

The widget window has three tabs.



Data tab: give the widget a title, choose its type (**Chart**, **Table**, **Metric** for one big number, or **Text** for a note), the chart type (bar, line, pie, doughnut or area) and the **Data Source** (the app). Scroll down inside the window to reach the last two.



Query tab: **Filters** choose which records count. **Metrics** choose the calculation: Count, Sum, Average, Minimum, Maximum or Distinct Count, and the field. **Grouping** splits the result by a field. The **Visuals** tab changes how the widget looks. Click **Create Widget** to finish.

Each widget has small icons at its top right to edit it, delete it, download its data and enlarge it. If you cannot see **Add New Widget** or the **+** for dashboards, your role may not allow editing dashboards; ask an administrator.

2.9 Download your data and share it

What you want	How
A table in Excel	In a report or in Explore, click **Export CSV**. Open the file in Excel or Google Sheets.
A chart as a picture	In a report, click **Save image** above the chart.
One dashboard widget's data	Click the download icon at the top right of the widget.
The same report for a colleague	Save the report, then tell them its name. They open it under **Saved reports** and see what they are allowed to see.

2.10 Two more tools

- **Quick Insights** (Reports page, box **More**): choose an app and click **Create Insight** on one of four ready-made starters: *Total Records*, *Records by Status*, *Records Over Time* and *Recent Activity*.

- **Team activity** (Dashboard page, or **More** on the Reports page): shows, for each person, the number of changes, hours clocked, clock-ins and active days, with a summary of what people did (for example how many records were created).

2.11 Before you quote a number

Four checks, 30 seconds

1. **Period.** Does **for** say what you meant (This month is not Last 30 days)?
2. **Conditions.** Is anything listed under **Only include where** that you forgot about?
3. **Records you can see.** Reports count only what you are allowed to see (see 1.5). A colleague with wider access may see a bigger number.
4. **Cross-check.** Click **Explore** and look at a few of the records behind the number.

If you see…	Try
A zero, or "no data"	Change **for** to **All time** and remove conditions one by one. A report for "This month" is empty if nothing was dated this month.
An app is missing from Start a report	You may not have access to it. Ask an administrator to check **App access**.
Numbers differ between two people	Check record visibility (see 1.5). It is the usual cause.
A page looks out of date	Click **Refresh**, or reload the browser page.
"Total (needs a number field)" in the Show list	The app has no number or money field to add up. Ask an administrator to add one in **Schema Designer**.

2.12 A simple routine for managers

When	Do this
Every morning	Open your dashboard and press **Refresh**. Look for anything out of the ordinary.
Every week	Open your saved reports. Export the ones you share with others.
Every month	Run a combined report with **Compare with the previous period** ticked, and save the page or image for your records.

PART 3

Your management reports

These are the reports your management uses today. Each one takes a few minutes to build in **Explore**, and you can save it and open it every day. In the screenshots the apps are called **SMB Sales** and **DSF Rejections**; use the app that matches your report (for example DSF Sales, FOG Sales or Consumer Sales). All names and numbers are made up.

3.1 Your reports at a glance

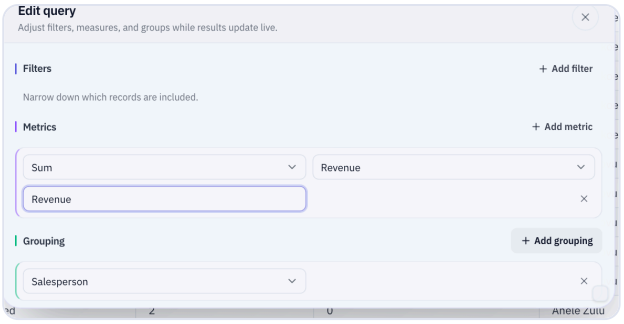
Report	What it shows	How to build it
Sales reports SMB, DSF, FOG and Consumer	Salesperson, stage and revenue	The sales app, then **Explore**: add a **Sum** of **Revenue**, grouped by **Salesperson** and **Stage** (Recipe 1)
Disposition report Yep Leads and SMB Leads	Salesperson and stage	The leads app, then **Explore**: a **Count**, grouped by **Salesperson** and **Stage** (Recipe 2)
DSF Rejection report	Sales agent, product and comments	The DSF app, then **Explore**: filter **Stage** to **Rejected** and keep three columns (Recipe 3)

One thing to check first

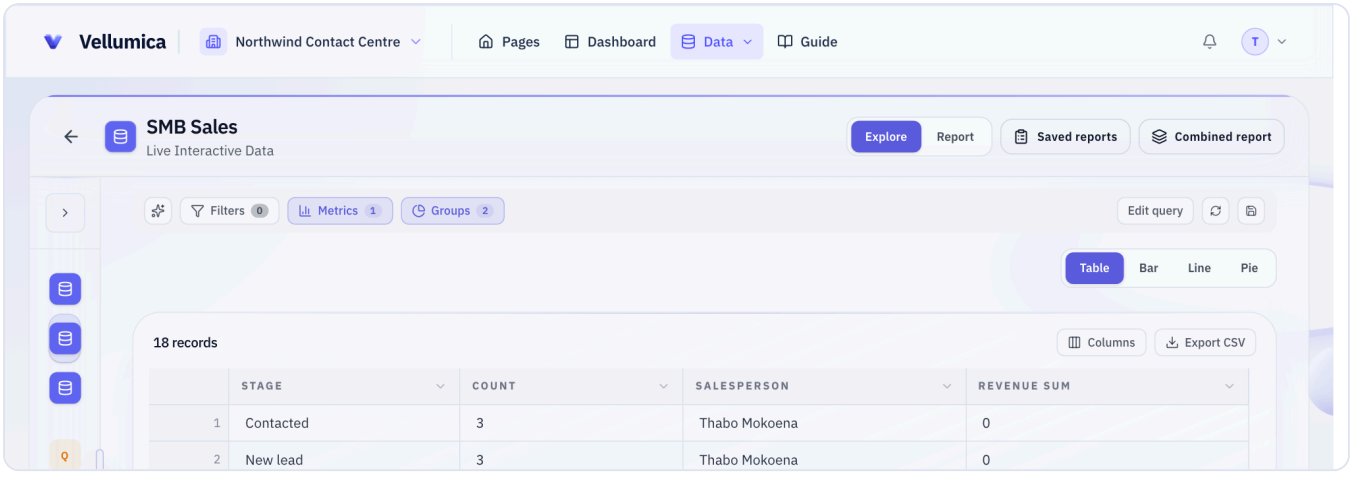
Use the field names your own app has. **Stage** here means the field that holds the stage or disposition of each record, and **Salesperson** is the field that holds the person. If yours are called something else, choose those in the same places.

3.2 Recipe 1: a sales report by salesperson and stage, with revenue

1. Open **Data** then **Analytics**. Under **Start a report**, click the sales app. You land on **Explore**.
2. Click **Edit query**. Under **Metrics** click **Add metric**. Choose **Sum** and the field **Revenue**. In the **Label** box you can type a name for the column, for example "Revenue".
3. Under **Grouping** click **Add grouping** and choose **Salesperson**. Click **Add grouping** again and choose **Stage**.
4. Close the window. The table shows one row for each salesperson and stage, with the number of records (**Count**) and the **Revenue** total. It updates as your team works.



Edit query: the metric (Sum of Revenue) and the first grouping (Salesperson). Add a second grouping for Stage below it.



The result: salesperson and stage, with the count and the revenue. The buttons **Table**, **Bar**, **Line** and **Pie** above the table change how it is shown.

> **Only count real sales**
>
> If revenue only belongs to sales that were made, click **Add filter** in the same window and choose **Stage**, **Equals**, then the stage for a made sale. Recipe 3 shows how a filter works.

3.3 Recipe 2: the disposition report

The disposition report is Recipe 1 without the revenue. It counts how many records each salesperson has in each stage.

1. Open the leads app (for example Yep Leads) under **Start a report**. You land on **Explore**.
2. Click **Edit query**. Under **Grouping** add **Salesperson** and then **Stage**. You do not need to add a metric: **Count** is shown for you.
3. Close the window. Each row is one salesperson in one stage, and **Count** is the number of records.

Yep Leads and SMB Leads are separate apps, so build the report once in each. To see just the total number of records in every app side by side, use a **Combined report** and click **Add a count for every app** (section 2.7).

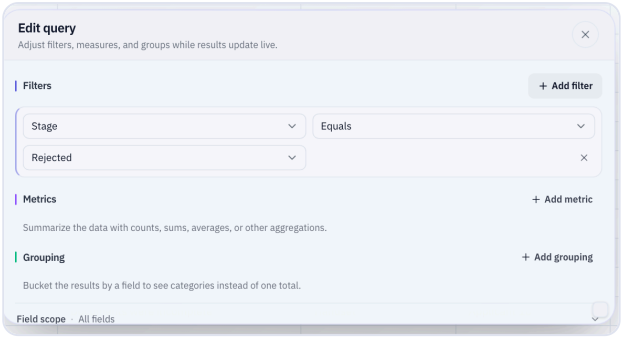
3.4 Recipe 3: the rejection report with agent, product and comments

1. Open the DSF app under **Start a report**. You land on **Explore**, which lists every record.

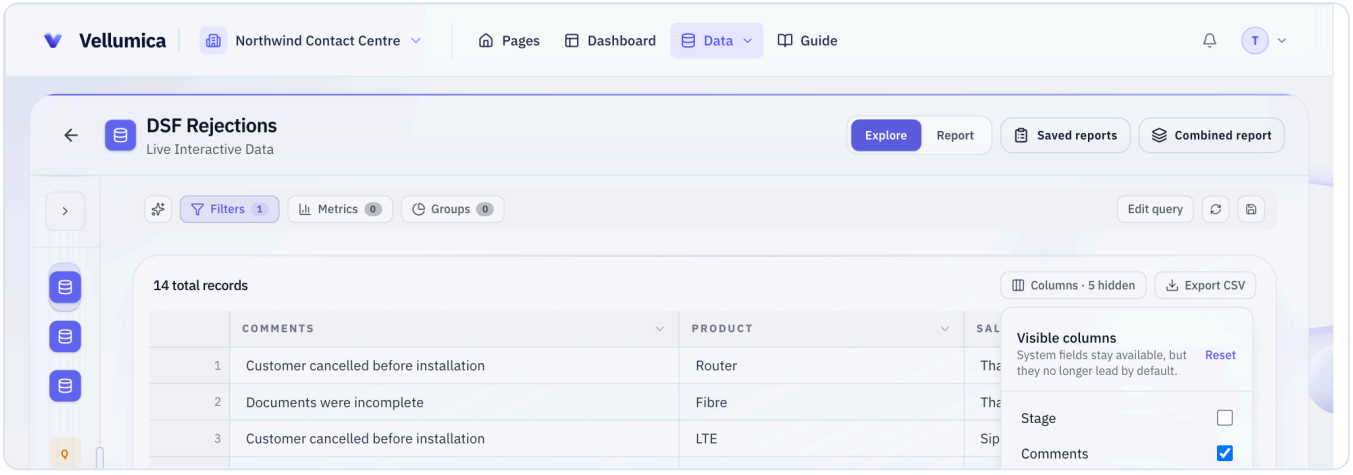
2. Click **Filters** then **Add filter**. Choose **Stage**, **Equals** and **Rejected**. The list now shows only rejected records, and the count above the table tells you how many.

3. Click **Columns** and untick the columns you do not want, here **Stage** and **Customer**. What is left is the sales agent, the product and the comments.

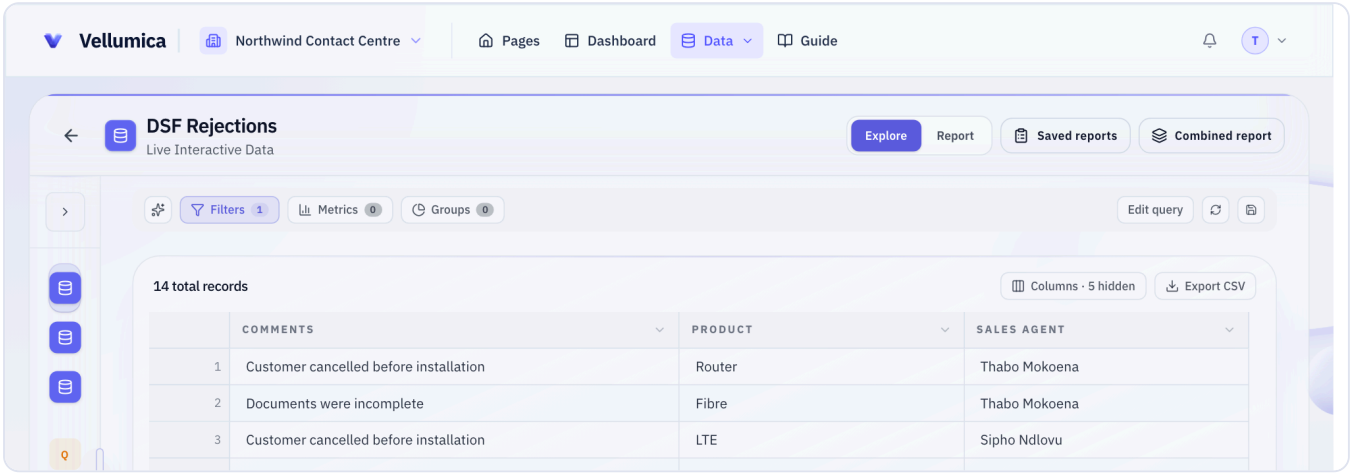
4. Click **Export CSV** to send it to Excel, or leave it on screen for your meeting.



The filter: Stage, Equals, Rejected.



The **Columns** menu. Untick what you do not need.



The finished report: 14 rejected records with the comment, the product and the sales agent.

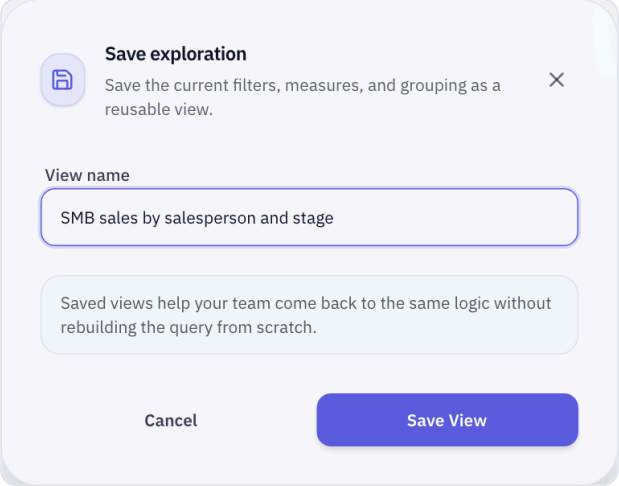
If your comments are the discussion under each record

The steps above work when "Comments" is a field in the app. If your team writes comments in the discussion area of each record, that is kept separately and does not appear as a column. Tell us and we will show you how to send those to a Google Sheet.

3.5 Save the report and open it every day

1. With your report on screen, click the **save** icon (the small disk) next to the refresh icon, at the top right.
2. Type a name your team will recognise, for example "SMB sales by salesperson and stage", and click **Save View**.
3. Next time, open **Data**, **Analytics**, open the **Analytics Hub** panel at the left and click the report under **Saved views**. It opens with up-to-date numbers.

Before you quote a number from any of these reports, run the four checks in section 2.11: the period, any filters, what you are allowed to see, and a look at a few records behind the number.



Give the report a clear name and click Save View.

One-page cheat sheet

Task	Where to click
Open reports	Data, then Analytics
Count or total by group	Start a report, choose the app, then Report. Set Show, by and for.
Only some records	Add a condition
Keep a report	Save report (bottom of the report), reopen under Saved reports
See the records behind a number	Explore (top right)
Several apps on one page	Combined report
A live meeting page	Analytics Hub, Dashboards +, Add New Widget
Excel or picture	Export CSV, Save image
Count or revenue by salesperson and stage	Explore, Edit query: Add metric, then Add grouping twice (Part 3)
A list such as the rejection report	Explore: Filters, then Columns, then Export CSV
Who did what	Team activity
Different numbers for two people	Record visibility (Settings, App access, Preview access as a member)

Vellumica reporting guide, 16 November 2026. Screens are from a sample workspace; the buttons and wording match the product.