

Activities

Report Name	Description	Designed For	Double-Click to View Sample
Activities by Type Graph	Displays a graph showing the percentage of your Activities, according to the Activity Type assigned to them.	Customer Service Management can use this to see which types of activities are most common.	 Activities By Type Graph
Activity Call Report Graph	Displays a graph showing the percentage of each type of phone call being logged in Activities (i.e. Conference, Outbound, Inbound, etc)	Customer Service Management can see trends-for example, a large percentage of inbound calls could indicate service issues that need to be addressed.	 Activity Call Report Graph
Activity Call Report Log	Shows a list of all the Activities, and lists the Direction, Rep, Contact, Company, Date, and Result for each.	Customer Service Management can quickly see a snapshot of the Activities conducted by each Rep.	 Activity Call Report Log
Activity Call Trend Report	Displays a graph that shows how many minutes the Rep has spent with their Contacts.	Customer Service Management may use this to look for trends where certain Contacts require more time than others.	 Activity Call Trend Report
Activity Detail	Displays all of the Activity information available, organized one to a page.	Customer Service Management may wish to share Activity details with non-CRM users.	 Activity Detail
Activity History Project Report	Lists the Activities, and for each summarizes the Action, Rep Contact, Company, Result and Notes.	Customer Service Management may use this as a reference when meeting with their staff for updates or communicating with Customers who have questions.	 Activity History Project Report
Activity History	Lists the Activities, and for each summarizes the Action, Rep Contact, Company, Result and Notes. Results are grouped by Company.	Customer Service Management may use this as a reference when meeting with their staff for updates or communicating with Customers who have questions.	 Activity History

Activity Results by Type Graph	Displays a color pie chart showing the percentage for each Type of Activity Result logged (i.e. Completed, Left Message, or Open).	Quickly shows visual view of open Activities compared to Completed Activities.	 Activity Results by Type Graph
Activity Results Call Report Graph	Displays a color pie chart showing the numbers of each Result Type logged.	Quickly shows a visual view of the volume of Activities as well as their results.	 Activity Results Call Report Graph
Open Activity Graph	Displays a bar chart showing the number of Open Activities for each Rep.	Customer Service Management can determine which Reps may need assistance and/or training.	 Open Activity Graph

Opportunities			
Report Name	Description	Designed For	Double-Click to View Sample
Competitor Analysis Graph	Displays a pie chart showing the number of Opportunities you are competing with for each Competitor.	Sales Management can use this to see which Competitors are strongest.	 Competitor Analysis Graph
Competitor Won-Lost Graph	Displays a bar chart shows the total number of Opportunities for each Competitor, and is color coded to indicate the number won and lost for each.	Sales Management can quickly see which competitors they need to worry most about.	 Competitor Won-Lost Graph
Forecast by \$ Value and % to Buy	Displays a bar chart shows the total dollar value for the Opportunities. It breaks these into % to Buy category ranges from 10-100% each.	Sales Management can see how many dollars are planning to be spent by the customers who will buy from someone-even if it is the competition.	 Forecast by \$ Value and % to Buy

Forecast by \$ Value and % to Close	Displays a bar chart shows the total dollar value for the Opportunities. It breaks these into % to Close category ranges from 10-100% each.	Sales Management can see how many dollars are planning to be spent by the customers who will buy from them vs the competition.	 Forecast by \$ Value and % to Close
Forecast by Rep - Status	Displays a bar chart showing the dollar value and Status of all the Opportunities by Rep.	Sales Management can get a quick visual view of the current status of all the Opportunities and determine which Reps may need assistance to close their deals.	 Forecast by Rep - Status
Forecast by Rep - \$ Value and % to Close	Displays a bar chart for each Rep showing the total dollar value for their Opportunities. It breaks these into % to Close category ranges from 10-100% each.	Sales Management can see how many dollars are planning to be spent by the customers who will buy from them vs the competition, organized by each individual Rep.	 Forecast by Rep - \$ Value and % to Clos
Forecast by Rep - % to Close	Produces a pie chart for each Rep showing the total dollar value of their Opportunities and is color coded to show the range of % to Close (likelihood of buying from you not Competitors).	Sales Management can use this to see a snapshot of each Rep's Opportunities and make an educated guess at the forecast for each.	 Forecast by Rep - % to Close
Forecast by Rep - \$ Value and % to Buy	Displays a bar chart for each Rep showing the total dollar value for their Opportunities. It breaks these into % to Buy category ranges from 10-100% each.	Sales Management can see how many dollars are planning to be spent by the customers who will buy from them OR the competition, organized by each individual Rep.	
Forecast Summary	List a summary for Each Opportunity, organized by Company. For each Opportunity the Description, Rep, Status, Priority, % to Close, % to Buy.	Sales Management can see the key details for all the Opportunities. It's easy to see which Companies have the most	 Forecast Summary

	Expected Close Date and Dollar Amount are shown.	Opportunities, highest dollar value, etc.	
Forecast Weighted by \$ Value	Displays a bar chart showing the total dollar value for all Opportunities. It breaks these into % to Buy category ranges from 10-100% each.	Sales Management can see the total dollars their customers are planning to spend either with them OR the competition.	 Forecast Weighted by \$ Value
Forecast Weighted by Month \$ Value and % to Buy	Displays a bar chart for each Rep showing the total dollar value for their Opportunities. It breaks these into % to Buy category ranges from 10-100% each.	Sales Management can see how many dollars are planning to be spent by the customers who will buy from them OR the competition, organized by each individual Rep.	 Forecast Weighted by Month \$ Value and % to Buy
Forecast Weighted by Value by Month	Bar chart showing for each month the total dollar value for Opportunities. Each column is color coded to indicate the range of % likely to Buy.	Sales Management can see buying decision trends across months and years.	 Forecast Weighted by Value by Month
Interest	Displays a bar chart showing the total # of Contacts interested in each of your products and services. The chart is color coded, and displays any Interest subgroups if you use them.	Sales Management can determine which products and services are in most demand.	 Interest
Length of Sales Cycle by Rep	Displays a pie chart for each Rep showing the number of Sales completed and is broken down into date ranges of 30 day periods.	Sales Management can determine patterns for each Rep regarding the length of time it takes to close a deal.	 Length of Sales Cycle by Rep
Opportunity Activity History	Displays a summarized history of all the Activities for each Opportunity. Includes the Action, Rep, Contact, Result and Notes.	Sales Management can see the important Activity data over time for each Opportunity.	 Opportunity Activity History

Opportunity Detail	Displays detailed history of all the Opportunities. Includes the Company, Method, Rep, Amount, Date Open, Status, Priority, Source, Budget and Expected Close Date.	Sales Management can see all critical Opportunity data in a summarized view.	 Opportunity Detail
Opportunity Summary	Displays a summary of Opportunity data, including Company, Opportunity Name, Status, Priority, % Close, % Buy, Expected Close Date and Amount.	Sales Management can use this to see all opportunities, their value and status. Useful for reference during Sales meetings, or to Management.	 Adobe Acrobat Document
Source Graph	Displays a pie chart showing the number of opportunities resulting from each source.	Marketing Management can see which sources provide the most opportunities so they can decide where to spend dollars and time most effectively.	 Source Graph
Source Media-Media Graph	Displays bar chart that shows for each Source the number of Levels and specific activities involved with it.	Marketing Management can see which Sources have the most work involved, and for each what the process entails.	 Source Media-Media Graph

Company			
Report Name	Description	Designed For	Double-Click to View Sample
Company Activity History	Displays a summarized history of all the Activities for each Company. Includes the Date, Action, Rep, Contact, Company, Result and Notes.	Sales Management can see the important Activity data over time for each Company.	 Company Activity History
Company Detail	Displays detailed history of all the Companies. Includes the Company Name and Address, Type, Status, Contacts and their	Sales Management can see all critical Company data in a summarized view.	 Company Detail

	information, Activity History and more.		
Company Interest Graph	Displays a bar chart showing the total # of Companies interested in each of your products and services. The chart is color coded, and displays any Interest subgroups if you use them.	Sales Management can determine which products and services are in most demand.	 Company Interest Graph
Company List Graph	Displays a bar chart showing the total number of Companies assigned to each List.	Marketing can quickly see visually which Lists are most common.	 Company List Graph
Company Source Graph	Displays a pie chart showing the number of Companies resulting from each source.	Marketing Management can see which sources provide the most opportunities so they can decide where to spend dollars and time most effectively.	 Company Source Graph
Company Source –Media Graph	Displays bar chart that shows for each Source the number of Levels and specific activities involved with it.	Marketing Management can see which Sources have the most work involved, and for each what the process entails.	 Company Source –Media Graph
Company With Phone and Address	This report display the Companies’ Name, Phone, Type and Address.	Handy quick reference that can be used by Reps to contact their Companies.	 Company With Phone and Address

Contact

Report Name	Description	Designed For	Double-Click to View Sample
Contact Activity History	Displays a summarized history of all the Activities for each Contact. Includes the Date, Action, Rep, Contact, Company, Result and Notes.	Sales Management can see the important Activity data over time for each Contact.	 Contact Activity History

Contact Detail	Displays detailed history of all the Contacts. Includes the Contact Name and Company, Title, Address, Email, Source and Phone Numbers. Activity History is also shown.	Sales Management can see all critical Contact data in a summarized view.	 Contact Detail
Contact Interest Graph	Displays a bar chart showing the total # of Contacts interested in each of your products and services. The chart is color coded, and displays any Interest subgroups if you use them.	Sales Management can determine which products and services are in most demand.	 Contact Interest Graph
Contact List Graph	Displays a bar chart showing the total number of Contacts assigned to each List.	Marketing can quickly see visually which Lists are most common.	 Contact List Graph
Contact Source	Displays a pie chart showing the number of Contacts resulting from each source.	Marketing Management can see which sources provide the most opportunities so they can decide where to spend dollars and time most effectively.	 Contact Source
Contact Source –Media Graph	Displays bar chart that shows for each Source the number of Levels and specific activities involved with it.	Marketing Management can see which Sources have the most work involved, and for each what the process entails.	 Contact Source –Media Graph
Contact PhoneBook	This report display the Contacts' Name, Phone, Type and Address. It includes Activity History.	Handy quick reference that can be used by Reps to work with their Contacts.	 Contact PhoneBook

Defect			
Report Name	Description	Designed For	Double-Click to View Sample

Defect Detail	Report of Defects, including the Defect #, Product, Version, Part, Type and Status.	Management can determine which products and service are responsible for the most customer complaints.	 Defect Detail
Defect Product Graph	Displays a bar chart showing the # of defects recorded for each Product. It is color coded to indicate which are open and which are closed.	Management can see where Customer Service needs to focus attention, and which products need improvement.	 Defect Product Graph

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Defect Product Graph	Displays a bar chart showing the # of defects recorded for each Product. It is color coded to indicate which are open and which are closed.	Management can see where Customer Service needs to focus attention, and which products need improvement.	 Defect Product Graph

Incident			
Report Name	Description	Designed For	Double-Click to View Sample
Incident Age Detail	Report of Defects, including the Defect #, Product, Version, Part, Type and Status.	Management can determine which products and service are responsible for the most customer complaints.	 Defect Detail

Incident Assignment Graph	Displays a bar chart showing the # of defects recorded for each Product. It is color coded to indicate which are open and which are closed.	Management can see where Customer Service needs to focus attention, and which products need improvement.	 Defect Product Graph
Incident Company Detail	This report displays Incident data organized by Company, including Company, # of Cases they Logged, Total Hours Used, Total Cases Open, and a list of the Incidents they logged. The list includes Product, Part, # of Occurrences, and # Open.	Summarizes the issues each Company has logged and provides a quick snapshot of whether the issues have been corrected yet.	 Incident Company Detail
Incident Detail	This report displays Incident data, including Company, Product, Case #, Version, Status, Part, Priority, Type, Assigned, Date Opened. It also displays the Name, Title, Company Phone and email for the contact who logged the case.	Summarizes each incident on one page each.	 Incident Detail
Incident Open Close Graph	This bar chart display the # of Incidents that have been assigned to each Rep. It is color coded to indicate which are open and closed.	Customer Service Management can easily see which reps may need assistance.	 Incident Open Close Graph
Incident Product Review	This report lists each Product, the # of Incidents logged against it, and what % of total Incidents that equates to.	Management can see which products are the source of the most problems.	 Incident Product Review
Incident Review Type	This report lists The Type of incidents logged against the Products (i.e. Defective, damaged, etc), the # of Incidents	Management can see which products are the source of the most problems.	 Incident Review Type

	logged against it, and what % of total Incidents that equates to.		
Incident Status Graph	This pie chart shows the Number of Incidents for each Status.	Customer Service Management can quickly see how many Incidents are Open, Resolved, on Hold, etc.	 Incident Status Graph
Incident Trend	This graph shows the number of Cases logged over a period of time.	Customer Service Management can quickly determine if certain times of the year are busier than others, etc.	 Incident Trend