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Report Types

Report Type: **with Opportunities**

to display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be to users when they generate reports from this report type.

to select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields. To rearrange the sections, select the section header and drag it to the desired location.

Report Properties

New

Cancel

Previous Layout

Next

Save Properties

Create New Section

Total Fields in Layout: 108

Account Name	Account Name	Activity Score	Address
Account Revenue	Current Field	City	CLP Growth E...
Comments	Company	Converted	Converted Ad...
Converted Cas...	Converted Date	ConvertedPost...	Converted Exp...
ConvertedLead	Country	Created By	Created Date
Date with Day	Date with E...	Date to Comp...	Description
Email(EmailAddress)	Do Not Call	EDM Number	Email Email ...
Email Global...	Email	Email Bounced...	Email Bounced...
Email Opt Out	Engagement Sc...	Exclude from...	Facebook C...
Fax	Fax Opt Out	First Name	Full Name
Generate Invoice...	Gen Account	Groups Inter...	Headline

Legend

Not in Page Layout

Used in Page Layout

Selected

Checked by Default

Added via Linking

Report

Layout Fields (via Settings)

Add fields created via Settings

Layout Fields (via Settings: Page1)

Opportunity ID

Opportunity ID

Steps

Notes

Lead

TestF TestL

Title

Other/Company

Test

Phone (2)

Email

test@me

Not Contacted

Details

Related

Lead Quick Information

Lead Owner

Shamal Jayakody

Lead Source

Customer Inquiry

Other Lead Source Detail

Name

TestF TestL

Phone

Service

Test

Convert Lead

> Account

Create New

Test

- OR -

Choose Existing

0 Account Matches detected

> Contact

Create New

Test TestL

- OR -

Choose Existing

0 Contact Matches detected

✓ Opportunity

Create New

*Opportunity Name

Test

Record Type

Standard Opportunity

- OR -

Choose Existing

0 Opportunity Matches

*Record Owner

Shamal Jayakody

*Converted Status

Qualified

Simulate an existing opportunity

Cancel

Convert

Follow

SQL

Convert

Change Owner

Mark Status as Complete

New Event

Write an email

Compose

Filters: All time • All activities • All types

Refresh • Expand All • View All

No activities to show.

ed by sending an email, scheduling a task, and more.

by Past meetings and tasks marked as done show up here.