



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Date

[Date Fields]▼

Range

[Date Range]▼

Custom Filters

Filter Logic (1 AND 2)

1

Account Executive▼

is▼

Jenny Janda or Leslie Ne...

🗑

2

Sales Status▼

is▼

Conditional or Pending

🗑

⊕

Add custom filter

Tabular Report ▼

▼ Advanced Settings

Columns to Summarize	Sum	Average	Largest Value	Smallest Value
Sales Price	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Preview

⚙ Columns ▼

Full Name	Company	Phone	Email	Sales Status	Account Executive	Sales Price
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda	\$200000
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda	\$300000
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000
Grand Total						\$2200000



Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

Find

Contacts





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- Properties
- Events

Find

Contacts▼

Filters

Show

My Contacts▼

Lifecycle

Prospect▼

Status

Toured▼

Date

Last Touched▼

Range

Last 90 Days▼

Custom Filters

[+ Add custom filter](#)

Tabular Report▼

Advanced▼

[+ Add Chart](#)▼

Preview: Contacts (203)

Columns▼

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel



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Contacts

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My Contacts

▼

Lifecycle

Prospect

▼

Status

Toured

▼

Date

Last Touched

▼

Range

Last 90 Days

▼

Custom Filters

► [Show filter logic](#)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Tabular Report ▼

⚙️ Advanced ▼

⊕ Add Chart ▼

Preview: Contacts (203)

⚙️ Columns ▼

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel



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▼

Lifecycle

Prospect

▼

Status

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▼

Date

Last Touched

▼

Range

Last 90 Days

▼

Custom Filters

▼ [Hide filter logic](#)

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▼

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▼

is

▼

Conditional or Pending



⊕ [Add custom filter](#)

Tabular Report ▼

⚙️ Advanced ▼

⊕ Add Chart ▼

Preview: Contacts (203)

⚙️ Columns ▼

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel



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[Date Fields]

▼

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[Date Range]

▼

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⊕ [Add custom filter](#)

Tabular Report

▼

Preview

⚙ Columns

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Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
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M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel





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Tabular Report ▼

Conditional or Pending

Find

Contacts▼

Filters

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Date

[Date Fields]▼

Range

[Date Range]▼

Custom Filters [+ Edit filter logic](#)

1

Account Executive▼

is

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Jenny Janda

🗑

2

Account Executive▼

is

▼

Leslie Neely

🗑

3

Status▼

is

▼

Closed, Reopened

☒

Closed

☒

Reopened

[+ Add custom filter](#)

Preview

⚙ Columns ▼

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel



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Tabular Report

▼

Preview

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Tappan
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Tappan

Columns ▼

☒ Full Name

☒ Company

☒ Phone

☒ Email

☒ Sales Status

☒ Account Executive

☐ Sales Price





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[Date Fields]

▼

Range

[Date Range]

▼

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Sales Status

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🗑

⊕ [Add custom filter](#)

Tabular Report ▼

⚙

Advanced ▼

Preview

Full Name	Company	Phone	Email	Sales Status	Account Executive
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel

⚙

Columns ▼

☒ Full Name

☒ Company

☒ Phone

☒ Email

☒ Sales Status

☒ Account Executive

☒ Sales Price



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Date

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▼

Range

[Date Range]

▼

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▼

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🗑

⊕ [Add custom filter](#)

Tabular Report

▼

⚙ Advanced

▼

Preview

⚙ Columns

▼

Full Name	Company	Phone	Email	Sales Status	Account Executive	Sales Price
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda	\$200000
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda	\$300000
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000



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Contacts

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Filters  
Status

Toured & Interested

[Date Fields]

[Date Range]

Custom Filters

Filter Logic
(1 AND 2)

Filter Logic	(1 AND 2)
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1 Account Executive ▼

is

Jenny Janda or Leslie Ne...



2 Sales Status ▼

is

Conditional or Pending



 Add custom filter

Tabular Report ▼



Advanced ▼

## Preview

	Columns To Summarize						Sales Price
Full Name	Codename	Phone Number	Email Address	Status	Executive	Sales Price	
Larry Summers		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$200000	
Ron Swanson	Park & Rec	(904) 555-1212	jluce@outlook.com	Pending	Jenny Janda	\$100000	
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000	
John Luce		(512) 555-1212	jluce@outlook.com	Pending	Jenny Janda	\$300000	
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000	



Columns ▼



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Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

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Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Tabular Report

▼

⚙ Advanced

▼

Preview

Full Name		Comp				Sales Price	Contract Price
Larry Summers						200000	\$200000
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000	\$200000
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000	\$200000
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda	\$300000	
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000	
Total						\$2200000	
Average						\$200000	

Columns to Summarize	Total	Average	Largest Value	Smallest Value
Sales Price	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

⚙ Columns

▼



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Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

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Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Tabular Report

▼

⚙ Advanced

▼

Preview

⚙ Columns

▼

Full Name	Company	Phone	Email	Sales Status	Account Executive	Sales Price
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda	\$200000
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000
M. Dell		(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000
John Luce		(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda	\$300000
Lowell Piper	Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000
Grand Total						\$2200000





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Find

Contacts

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Filters

Status

Toured & Interested

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Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

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Account Executive

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Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

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▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Tabular Report ▼		⚙️ Advanced ▼					⚙️ Columns ▼	
Tabular Report								
Summary Report								
Matrix Report								
Larry Summers		Company	Phone	Email	Sales Status	Account Executive	Sales Price	
			(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda	\$200000	
Ron Swanson		Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000	
M. Dell			(512) 555-0001	eljefe@dell.com	Conditional	Jenny Janda	\$1200000	
John Luce			(512) 555-1212	jluc@outlook.com	Pending	Jenny Janda	\$300000	
Lowell Piper		Self employed	(904) 555-4323		Conditional	Alan Daniel	\$400000	
Grand Total							\$2200000	





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- Automation
- Reports
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- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

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Account Executive

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is

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🗑
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Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Summary Report

▼

⚙

Advanced

▼

▼ [Advanced Settings](#)

Group by

Account Executive

▼

Ascending (A-->Z)

▼

and then by

Sales Status

▼

Ascending (A-->Z)

▼

Columns to Summarize	Sum	Average	Largest Value	Smallest Value
Sales Price	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

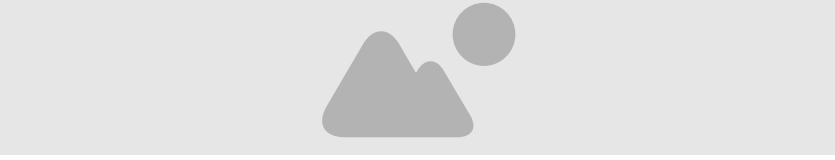
Preview

⚙

Columns

▼

Account Executive	Sales Status	Full Name	Company	Phone	Email	Sales Price
▼ Jenny Janda (3)						\$1700000
▼ Conditional (2)						\$1400000
		Larry Summers		(512) 555-1212	lsummers@yahoo.com	\$200000
		M. Dell		(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)						\$300000
		John Luce		(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)						\$500000
▼ Conditional (1)						\$400000
		Lowell Piper	Self employed	(904) 555-4323		\$400000
▼ Pending (1)						\$100000
		Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	\$100000
Grand Total						\$2200000



Save Report

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- Events

Find

Contacts

Filters

Status

Toured & Interested

Date

[Date Fields]

Range

[Date Range]

Custom Filters

Filter Logic (1 AND 2)

- 1

Account Executive

is

Jenny Janda or Leslie Ne...
- 2

Sales Status

is

Conditional or Pending

+ Add custom filter

Summary Report

Advanced

Preview

Columns

Full Name	Company	Phone	Email	Sales Status	Account Executive	Sales Price
Larry Summers		(512) 555-1212	lsummers@yahoo.com	Conditional	Jenny Janda	\$200000
Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	Pending	Alan Daniel	\$100000
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Grand Total						\$2200000



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Range

[Date Range]

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Summary Report

Preview

Full Name	Company
Larry Summers	
Ron Swanson	Pd
M. Dell	
John Luce	
Lowell Piper	Se
Grand Total	

Advanced

Group by

Ascending (A-->Z)

and then by

Ascending (A-->Z)

Columns to Summarize	Sum	Average	Largest Value	Smallest Value
Sales Price	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Columns

Account Executive	Sales Price
la	\$200000
	\$100000
la	\$1200000
la	\$300000
	\$400000
	\$2200000



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Contacts

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Filters

Status

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Date

[Date Fields]

▼

Range

[Date Range]

▼

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Account Executive

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is

▼

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▼

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⊕ [Add custom filter](#)

Summary Report ▼

Preview

Account Executive
▼ Jenny Janda (3)

▼ Alan Daniel (2)

▼ *Conditional (1)*

Lowell PiperSelf employed(904) 555-4323

▼ *Pending (1)*

Ron SwansonParks & Rec(904) 555-4323rswan@parks.org

Grand Total\$2200000

⚙️ Advanced ▼

⊕ Add Chart ▼

Group by

Account Executive

▼

Ascending (A-->Z)

▼

and then by

Sales Status

▼

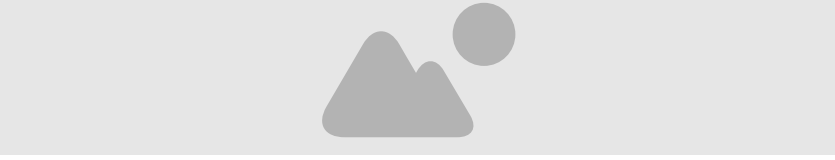
Ascending (A-->Z)

▼

Columns to Summarize	Sum	Average	Largest Value	Smallest Value
Sales Price	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

⚙️ Columns ▼

Sales Price
\$1700000
<i>\$1400000</i>
ahoo.com\$200000
com\$1200000
<i>\$300000</i>
rk.com\$300000
\$500000
<i>\$400000</i>
\$400000
<i>\$100000</i>
\$100000
\$2200000



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+ Add Chart

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Columns

Account Executive	Sales Status	Full Name	Company	Phone	Email	Sales Price
▼ Jenny Janda (3)						\$1700000
▼ Conditional (2)						\$1400000
Larry Summers				(512) 555-1212	lsummers@yahoo.com	\$200000
M. Dell				(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)						\$300000
John Luce				(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)						\$500000
▼ Conditional (1)						\$400000
Lowell Piper			Self employed	(904) 555-4323		\$400000
▼ Pending (1)						\$100000
Ron Swanson			Parks & Rec	(904) 555-4323	rswan@parks.org	\$100000
Grand Total						\$2200000





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⊕ [Add custom filter](#)

Summary Report

▼

⚙

Advanced

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⊕

Add Chart

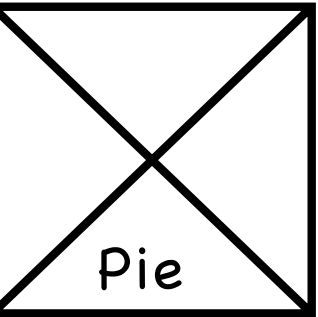
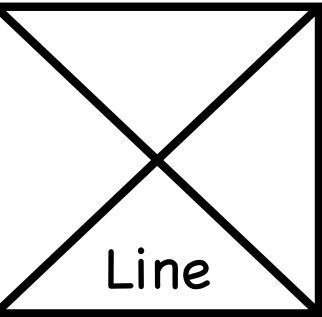
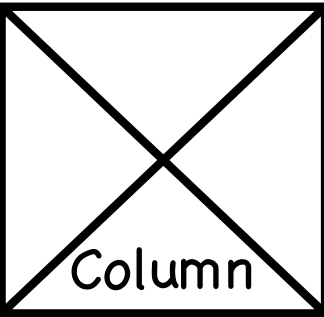
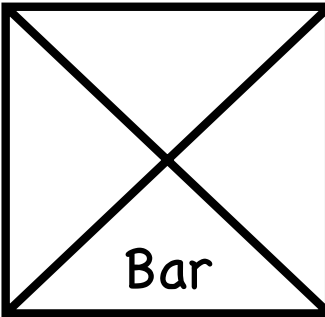
▼

Preview

Account Executive
▼ Jenny Janda
▼ Alan D...
Grand Total

Add Chart

Chart Type



Legend Location

Top

▼

Display Options

- ☒ Show axis labels
- ☒ Show X-axis values
- ☒ Show values on hover

Chart Size

Medium

▼

Add Chart

Preview

Chart Title

☐ BDX ☐ Realtor.com ☐ New Home Source

Y Axis

▼

X Axis

▼







Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

[+ Add custom filter](#)

Summary Report ▼

⚙

Advanced ▼

+

Edit Chart ▼

Chart Title

- ☐ BDX
- ☐ Realtor.com
- ☐ New Home Source



Preview

⚙

Columns ▼

Account Executive	Sales Status	Full Name	Company	Phone	Email	Sales Price
▼ Jenny Janda (3)						\$1700000
▼ Conditional (2)						\$1400000
Larry Summers				(512) 555-1212	lsummers@yahoo.com	\$200000
M. Dell				(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)						\$300000
John Luce				(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)						\$500000
▼ Conditional (1)						\$400000
Lowell Piper				Self employed	(904) 555-4323	\$400000
▼ Pending (1)						\$100000
Ron Swanson				Parks & Rec	(904) 555-4323	\$100000
Grand Total						\$2200000



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

[+ Add custom filter](#)

Summary Report ▼

⚙️ Advanced ▼

✎ Edit Chart ▼

- Edit Chart
- Add to Dashboard
- Remove Chart

Chart Title

☐ BDX ☐ Realtor.com ☐ New Home S



Preview

⚙️ Columns ▼

Account Executive	Sales Status	Full Name	Company	Phone	Email	Sales Price
▼ Jenny Janda (3)						\$1700000
▼ Conditional (2)						\$1400000
Larry Summers				(512) 555-1212	lsummers@yahoo.com	\$200000
M. Dell				(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)						\$300000
John Luce				(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)						\$500000
▼ Conditional (1)						\$400000
Lowell Piper				Self employed	(904) 555-4323	\$400000
▼ Pending (1)						\$100000
Ron Swanson				Parks & Rec	(904) 555-4323	\$100000
Grand Total						\$2200000



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Summary Report ▼

⚙ Advanced ▼

Preview

⚙ Columns ▼

Account Executive	Sales Status	Full Name	Company	Phone	Email	Sales Price
▼ Jenny Janda (3)						\$1700000
▼ Conditional (2)						\$1400000
		Larry Summers		(512) 555-1212	lsummers@yahoo.com	\$200000
		M. Dell		(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)						\$300000
		John Luce		(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)						\$500000
▼ Conditional (1)						\$400000
		Lowell Piper	Self employed	(904) 555-4323		\$400000
▼ Pending (1)						\$100000
		Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	\$100000
Grand Total						\$2200000



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Summary Report ▼	⚙ Advanced ▼					
Tabular Report						
Summary Report						
Matrix Report						
▼ Jenny Janda (3)	\$1700000					
▼ Conditional (2)	\$1400000					
	Sales Status	Full Name	Company	Phone	Email	Sales Price
		Larry Summers		(512) 555-1212	lsummers@yahoo.com	\$200000
		M. Dell		(512) 555-0001	eljefe@dell.com	\$1200000
▼ Pending (1)	\$300000					
		John Luce		(512) 555-1212	jluc@outlook.com	\$300000
▼ Alan Daniel (2)	\$500000					
▼ Conditional (1)	\$400000					
		Lowell Piper	Self employed	(904) 555-4323		\$400000
▼ Pending (1)	\$100000					
		Ron Swanson	Parks & Rec	(904) 555-4323	rswan@parks.org	\$100000
Grand Total	\$2200000					



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

Filters

Status

Toured & Interested

Date

[Date Fields]

Range

[Date Range]

Custom Filters

Filter Logic (1 AND 2)

- 1

Account Executive

is

Jenny Janda or Leslie Ne...
- 2

Sales Status

is

Conditional or Pending

+ Add custom filter

Matrix Report

▼ Advanced Settings

Group Rows by

Account Executive

Ascending (A-->Z)

Group Columns by

Sales Status

Ascending (A-->Z)

Columns to Summarize	Sum
Sales Price	

Preview: Sum of Sales Price

Account Executive	Conditional	Pending	Grand Total
Jenny Janda	1400000	300000	1700000
Alan Daniel	400000	100000	500000
Grand Total	1800000	400000	2200000





Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



+ Add custom filter

Matrix Report ▼

⚙️ Advanced ▼

Preview: Sum of Sales Price

Account Executive	Conditional	Pending	Grand Total
Jenny Janda	1400000	300000	1700000
Alan Daniel	400000	100000	500000
Grand Total	1800000	400000	2200000





Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



+ Add custom filter

Matrix Report



Advanced



Preview: Sum of Sales

Account Executive	Count
Jenny Janda	14
Alan Daniel	4
Grand Total	18

Group Rows by

Account Executive

▼

Ascending (A-->Z)

▼

Group Columns by

Sales Status

▼

Ascending (A-->Z)

▼

Columns to Summarize	Sum
Sales Price	⊙

X



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



+ Add custom filter

Matrix Report



Advanced



Preview: Sum of Sales Price

Account Executive	Conditional	Account Executive	Conditional
Jenny Janda	1400000	300000	1700000
Alan Daniel	400000	100000	500000
Grand Total	1800000	400000	2200000

\$1,400,000  
% of Conditional: 78%  
% of Jenny Janda: 82%  
Record Count: 2



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



+ [Add custom filter](#)

Matrix Report

▼

Display

▼

⚙️ Advanced

▼

Preview: Sum of Sales

Account Executive	Call		Grand Total
Jenny Janda	1400000	300000	1700000
Alan Daniel	400000	100000	500000
Grand Total	1800000	400000	2200000

call-completed
left voicemail





Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



+ Add custom filter

Matrix Report ▼

Display ▼

⚙️ Advanced ▼

Preview: Sum of Sales Price

Account Executive		Conditional	Pending	Grand Total
Jenny Janda	Sum: Sales Price Record Count	1400000 2	300000 1	1700000 3
Alan Daniel	Sum: Sales Price Record Count	400000 1	100000 1	500000 2
Grand Total	Sum: Sales Price Record Count	1800000 3	400000 2	2200000 5



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



[+ Add custom filter](#)

Matrix Report



Display



Advanced



140000 (78%, 82%, 2)

Preview:

Display Format: Sum of Sales Price (% of Total, Record Count)

Account Executive		Conditional	Pending	Grand Total
Jenny Janda	Sum: Sales Price Percent of Total Record Count	1400000 78%   82% 2	300000 75%   17% 1	<i>1700000</i> <i>77%</i> <i>3</i>
Alan Daniel	Sum: Sales Price Percent of Total Record Count	400000 22%   80% 2	100000 25%   20% 1	<i>500000</i> <i>23%</i> <i>2</i>
Grand Total	Sum: Sales Price Percent of Total Record Count	<i>1800000</i> <i>82%</i> <i>3</i>	<i>400000</i> <i>18%</i> <i>2</i>	<i>2200000</i> <i>100%</i> <i>5</i>

\$1,400,000  
% of Conditional: 78%  
% of Jenny Janda: 82%  
Record Count: 2



Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...



2

Sales Status

▼

is

▼

Conditional or Pending



[+ Add custom filter](#)

Matrix Report



Display



Advanced



140000 (78%, 82%, 2)

Preview:

Display Format: Sum of Sales Price (% of Total, Record Count)

Account Executive	Conditional	Pending	Grand Total	
Jenny Janda	140000 (78% 82% 2)	300000	1700000	
Alan Daniel	Sum: Sales Price Percent of Total Record Count	400000 22%   80% 2	100000 25%   20% 1	<b>500000</b> <b>23%</b> <b>2</b>
Grand Total	Sum: Sales Price Percent of Total Record Count	<b>1800000</b> <b>82%</b> <b>3</b>	<b>400000</b> <b>18%</b> <b>2</b>	<b>2200000</b> <b>100%</b> <b>5</b>

\$1,400,000  
% of Conditional: 78%  
% of Jenny Janda: 82%  
Record Count: 2





Save Report

Run Report

- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

Find

Contacts

▼

Filters

Status

Toured & Interested

▼

Date

[Date Fields]

▼

Range

[Date Range]

▼

Custom Filters

Filter Logic

(1 AND 2)

- 1

Account Executive

▼

is

▼

Jenny Janda or Leslie Ne...

🗑
- 2

Sales Status

▼

is

▼

Conditional or Pending

🗑

⊕ [Add custom filter](#)

Matrix Report

▼

Display

▼

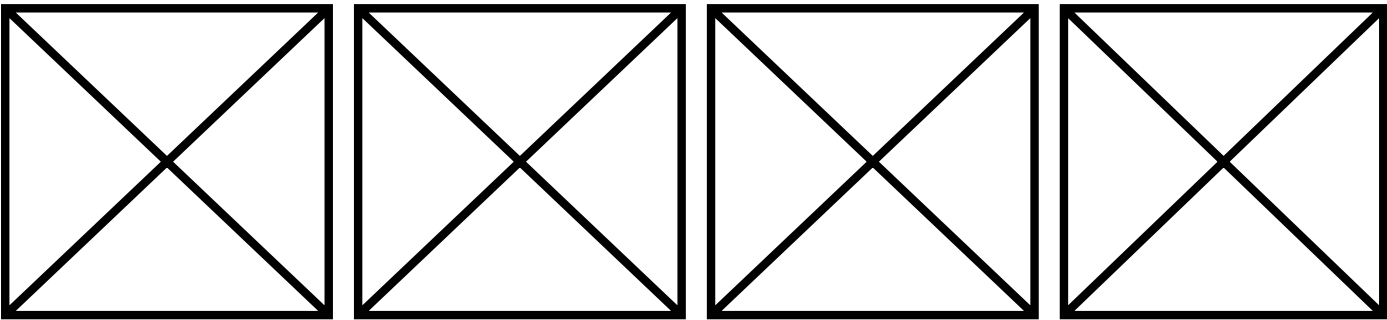
⚙ Advanced

▼

Preview: Sum of Sales Price

Account Executive			Conditional	Pending	Grand Total
Jenny Janda	Sum: Sales Price	Dec 2012	1400000	300000	<i>1700000</i>
	Sum: Sales Price	Nov 2012	1200000	200000	<i>1400000</i>
		Variance: Sales Price	200000	100000	<i>300000</i>
		% Variance: Sales Price	17%	50%	<i>21%</i>

Chart Type



Y Axis

▼

X Axis

▼

Legend Location

Top

▼

Display Options

- ☒ Show axis labels
- ☒ Show X-axis values
- ☒ Show values on hover
- ☒ Include on Dashboard

Preview

Chart Title

- ☐ BDX
- ☐ Realtor.com
- ☐ New Home Source

