Reports Module

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# Report Module Notes

**Notes**

1. This view displays standard and custom reports.

# Reports List

**Functional Description**

This view displays standard and custom reports.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Link |  |  |
| Module | Text | Options include:   1. Contacts 2. Campaigns 3. Forms 4. Automation 5. Analytics & Reports |  |
| Last Run | Text | Date last run by the User |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Run | Icon | Associated with a record |  |
| Edit | Icon | Associated with a record  Applies to custom reports |  |
| Copy | Icon | Associated with a record  Applies to custom reports |  |
| Delete | Icon | Associated with a record  Applies to custom reports | Alert: “You’re about to delete 1 report. Are you sure you want to delete 1 report?”  Buttons: “Delete Report” and “Cancel” |
| All Reports | Link | Filters grid |  |
| Smart Reports | Link | Filters grid |  |
| Custom Reports | Link | Filters grid |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Report | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Create/Edit Custom Report

**Functional Description**

This view allows the User to create a new custom report or edit an existing custom report.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name\* | Textbox & Text | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Report ([date])”  Example: Untitled Report (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| Search Object | Dropdown | Options may include:   1. Contacts 2. Contacts and Activities 3. Contacts and Automation 4. Contacts and Campaigns 5. Contacts and Relationships 6. Contacts and Tours |  |
| **Filters** | | | |
| [Predefined Filters] | Varies | Display once a Search Object has been selected.  Predefined filters depend upon the selected Search Object |  |
| Custom Filter Number | Text | Row number for the Custom Filter |  |
| Custom Filter Field\* | Dropdown | Options include fields associated with the option selected |  |
| Custom Filter Field Qualifier\* | Dropdown | Options may include:   1. Contains 2. Does not contain 3. Is 4. Is not 5. Is empty 6. Is not empty 7. Is equal to 8. Is not equal to 9. Is greater than 10. Is greater than or equal to 11. Is less than 12. Is less than or equal to   Exact options are dependent upon the Field selected |  |
| Custom Filter Search Value\* | Depends upon Selection | The type of input depends upon the Field selected |  |
| Filter Logic | Textbox | Display if User opts to edit logic  Display above Custom Filters  Default to “AND” statements  Example: “1 AND 2 AND 3” |  |
| **Display Options (accordion or pop-over)** | | | |
| Record Count | Checkbox | Applies to Tabular Reports once grouping is selected  Also applies to Matrix Reports  For Tabular Reports, display record count in parenthesis adjacent to grouping name  For Matrix Reports, TBD |  |
| % of Total(s) | Checkbox | Applies to Matrix Reports |  |
| % of Change | Checkbox | Applies to Matrix Reports when comparing date ranges |  |
| **Advanced Options (accordion or pop-over)** | | | |
| Group by | Dropdown | Applies to Tabular Reports  Primary grouping  Options include fields displayed in the Preview table |  |
| And then by | Dropdown | Applies to Tabular Reports  Secondary grouping  Options include fields displayed in the Preview table |  |
| Display record count? | Checkbox | Applies to Tabular Reports  Disabled by default  Enable if grouping is selected  If selected, display record count in parenthesis adjacent to grouping name |  |
| Columns to summarize | Text | Applies to Tabular Reports and Matrix Reports  Options include all numerical fields displayed in the Preview table  List column names in the same order they are displayed in the table |  |
| Summary Options | Checkbox or Radio Button | Checkbox options for Tabular Reports include:   1. Sum 2. Average 3. Minimum 4. Maximum   Radio button options for Matrix Reports include:   1. Sum |  |
| **Add Chart (accordion or pop-over)** | | | |
| Chart Type | Icon | Options include:   1. Column 2. Line 3. Pie |  |
| X-axis Data | Dropdown | Applies to Column and Line  Options include summary and group fields in the Tabular or Matrix Reports |  |
| Y-axis Data | Dropdown | Applies to Column and Line  Options include summary and group fields in the Tabular or Matrix Reports |  |
| Chart Title | Textbox | Need to allow formatting options.  Consider editing in-place |  |
| Legend Position | Dropdown | Options include:   1. Top 2. Bottom |  |
| Display options | Checkbox | Options include:   1. Show axis labels 2. Show X-axis values 3. Show values on hover |  |
| Chart Size | Dropdown | Options include:   1. Small 2. Medium 3. Large |  |
| **Preview** | | | |
| Record Count | Text | Display a count of records found  Update count as filters are modified  Display verbiage as: [Search Object] (# of results)  Example: Contacts (203) |  |
| Results | Grid | Select and display the first 25 results |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add custom filter | Link | Adds a custom filter |  |
| Delete custom filter | Icon | Deletes selected custom filter and updates Filter Logic |  |
| Edit filter logic | Link | Displays filter logic textbox above the first custom filter |  |
| [Report format] format | Dropdown | Allows User to change format of report  Options include:   1. Tabular Format 2. Matrix Format   Default to Tabular Format  Disable Matrix Format until grouping is selected |  |
| Advanced Options | Link or Button | Displays pop-over or accordion panel containing Advanced Options |  |
| Add Chart | Button | Disabled until grouping is selected |  |
| Columns | Button with Dropdown | Dropdown containing a list of all available fields  Dropdown also includes search functionality  Multiple values may be selected via checkbox  Selected fields may be reordered, which affect |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Report | Link |  |
| Save Report As | Link |  |
| Run Report | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# View Custom Report

**Functional Description**

This view allows the User to view a new or existing custom report.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Text |  |  |
| Tag(s) | Icon |  |  |
| Search Object | Text |  |  |
| **Filters** | | | |
| [Predefined Filters] | Text | Predefined filters may be modified when viewing the report |  |
| Custom Filter Number | Text | Row number for the Custom Filter |  |
| Custom Filter Description | Text | Combine Custom Filter Field, Custom Filter Qualifier, and Custom Filter Search Value in a textual description |  |
| Filter Logic | Text |  |  |
| **Results** | | | |
| Record Count | Text | Display a count of records found  Update count as filters are modified  Display verbiage as: [Search Object] (# of results)  Example: Contacts (203) |  |
| Results | Grid |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Columns | Button with Dropdown | Dropdown containing a list of all available fields  Dropdown also includes search functionality  Multiple values may be selected via checkbox  Selected fields may be reordered, which affect |  |
| Show/Hide Details | Button | Applies to Tabular Reports when grouping is selecting and Matrix Reports  Show or Hide grouping details |  |
| Export to Excel | Link | Generates Excel version and returns to browser |  |
| Export to PDF | Link | Generates PDF version and returns to browser |  |
| Printable View | Link | Generates printable view |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Report As | Link |  |
| Edit Report |  |  |

**Exceptions**

None

**Notes and Issues**

None

# Campaign Report

**Functional Description**

This report is the same as ‘View Campaign’ in the Campaigns Module.

# Login Frequency Report

**Functional Description**

This tabular report returns a list of Users and their login count and last login.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Login Frequency |  |
| **Filters** | | | | |
| Time Period\* | Dropdown | | Options include:   1. Last 30 days 2. Last 60 days 3. Last 90 days 4. Custom |  |
| Custom Time Period | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | | |
| User Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Users (# of results)  Example: Users (14) |  |
| First Name | Link | Concatenate before Last Name  Link to Contact’s record | |  |
| Last Name | Link | Concatenate after First Name  Link to Contact’s record | |  |
| Email Address | Link | Link to Email view | |  |
| Last Login | Text | | Sortable  Timestamp |  |
| Logins | Text | | Sortable  Count of logins during the selected Time Period |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Last Login | Sortable Column Header | | Sorts records |  |
| Logins | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – Lead Source

**Functional Description**

This matrix report returns a count of contacts per lead source.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Login Frequency |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Lead Source Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Lead Sources (# of results)  Example: Lead Sources (14) |  |
| Lead Source | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – Postal Codes

**Functional Description**

This matrix report returns a count of contacts per zip code.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Postal Codes |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Postal Code Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Postal Codes (# of results)  Example: Postal Codes (14) |  |
| Postal Code | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – Sales Status

**Functional Description**

This matrix report returns a count of contacts per sales status.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Sales Status |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Sales Status Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Sales Status (# of results)  Example: Sales Status (14) |  |
| Sales Status | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – State/Province

**Functional Description**

This matrix report returns a count of contacts per state/province.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | State/Province |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| State/Province Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: State/Province (# of results)  Example: State/Province (14) |  |
| State/Province | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – Contact Type

**Functional Description**

This matrix report returns a count of contacts per contact type.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Contact Type |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Contact Type Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Contact Type (# of results)  Example: Contact Type (14) |  |
| Contact Type | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# 1-Click Report – Communities Toured

**Functional Description**

This matrix report returns a count of contacts per communities toured.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Contact Type |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Report Type\* | Dropdown | | Options include:   1. Lead Source (default) 2. Postal Codes 3. Sales Status 4. State/Province 5. Contact Type 6. Communities Toured |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Chart\* | Dropdown | | Options include:   1. Bar (default) 2. Pie |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Communities Toured Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities Toured (# of results)  Example: Communities Toured (14) |  |
| Communities Toured | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Database Sales Status

**Functional Description**

This matrix report returns a count of contacts per sales status.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Sales Status |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Account Executive\* | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Sales Status Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Sales Status (# of results)  Example: Sales Status (14) |  |
| Sales Status | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Total Traffic By Community

**Functional Description**

This matrix report returns a count of tours per community.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Total Traffic By Community |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Community\* | Dropdown | | Options include:   1. All (default) 2. [Community Name] |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Tours | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Tours | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Total Tour by Lead Source

**Functional Description**

This matrix report returns a count of tours per lead source.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Total Tour by Lead Source |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Lead Source\* | Dropdown | | Options include:   1. All (default) 2. [Lead Source] |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Lead Source Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Lead Sources (# of results)  Example: Lead Sources (14) |  |
| Lead Source | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Tours | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Tours | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Pipeline Summary Report

**Functional Description**

This matrix report returns a count of contacts with pipeline statuses.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Pipeline Summary Report |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Show\* | Dropdown | | Options include:   1. All (default) 2. Top 5 3. Top 10 4. Top 15 |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Sales Status Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Sales Statuses (# of results)  Example: Sales Statuses (14) |  |
| Sales Status | Text |  | |  |
| Percentage | Text | Sortable  Descending order | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| Percentage | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Traffic By Tour Type

**Functional Description**

This matrix report returns a count of tours by tour type and community.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic By Tour Type |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Tour Type\* | Dropdown | | Options include:   1. All (default) 2. [Tour Type] |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| [Tour Type] | Text | Sortable | |  |
| Total | Text | Sortable  Sum of all Tour Types for each Community | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Tour Type] | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Traffic By Sales Status

**Functional Description**

This matrix report returns a count of tours by sales status and community.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic By Sales Status |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Sales Status\* | Dropdown | | Options include:   1. All (default) 2. [Sales Status] |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| [Sales Status] | Text | Sortable | |  |
| Total | Text | Sortable  Sum of all Sales Statuses for each Community | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Sales Status] | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Traffic Report by Sales Rep & Lead Source

**Functional Description**

This matrix report returns a count of tours per lead source.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic Report by Sales Rep & Lead Source |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Account Executive Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Account Executives (# of results)  Example: Account Executives (14) |  |
| Account Executive | Text |  | |  |
| [Lead Source] | Text | Sortable  Descending order | |  |
| Tours | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Lead Source] | Sortable Column Header | | Sorts records |  |
| Tours | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Tour Type & Sales Status by Community (by Tours)

**Functional Description**

This matrix report returns a count of tours by community and lead source.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic Report by Sales Rep & Lead Source |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Account Executive | Multiselect | | Options include:   1. All (default) 2. [Account Executive] |  |
| **Results** | | | | |
| Chart | Chart | | Display selected chart above results |  |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| [Sales Status] | Text | Sortable  Descending order | |  |
| Tours | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Sales Status] | Sortable Column Header | | Sorts records |  |
| Tours | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# All Time Leads, Tours and Sales

**Functional Description**

This matrix report returns a count of all leads, tours, and sales.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | All Time Leads, Tours and Sales |  |
| **Results** | | | | |
| Title | Text | Rows include (in order):   1. Leads 2. Tours 3. Sales | |  |
| Total | Text |  | |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Export to Excel | Link | Generates Excel version and returns to browser |  |
| Export to PDF | Link | Generates PDF version and returns to browser |  |
| Printable View | Link | Generates printable view |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Traffic by Account Executive

**Functional Description**

This matrix report returns a count of tours by community and account executive.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic by Account Executive |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Account Executive | Multiselect | | Options include:   1. All (default) 2. [Account Executive] |  |
| **Results** | | | | |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| [Account Executive] | Text | Sortable | |  |
| Total | Text | Sortable | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Account Executive] | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Lead Sources By Sales Status

**Functional Description**

This matrix report returns a count of contacts by lead source and sales status.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Lead Sources By Sales Status |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| Sales Status\* | Dropdown | | Options include:   1. All (default) 2. [Sales Status] |  |
| **Results** | | | | |
| Lead Source Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Lead Source (# of results)  Example: Lead Source (14) |  |
| Lead Source | Text |  | |  |
| [Sales Status] | Text | Sortable | |  |
| Total | Text | Sortable  Sum of all Sales Statuses for each Lead Source | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Sales Status] | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Tour To Sale Conversion by Community

**Functional Description**

This matrix report returns a count of tours and sales by community.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Tour To Sale Conversion by Community |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | | |
| Community Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Communities (# of results)  Example: Communities (14) |  |
| Community | Text |  | |  |
| Total Tours | Text |  | |  |
| Total Sales | Text |  | |  |
| Closing Ratio | Text | Percentage  Closing Ration = Total Sales / Total Tours; | |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Total Tours | Sortable Column Header | Sorts records |  |
| Total Sales | Sortable Column Header | Sorts records |  |
| Closing Ratio | Sortable Column Header | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser |  |
| Export to PDF | Link | Generates PDF version and returns to browser |  |
| Printable View | Link | Generates printable view |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Activity Summary Report

**Functional Description**

This matrix report returns a count of activities by user.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Activity Summary Report |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | | |
| User Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: Users (# of results)  Example: Users (14) |  |
| [Activity] | Text | Sortable | |  |
| Total | Text | Sortable  Sum of all Sales Statuses for each Lead Source | |  |

**Actions or Controls**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | Additional Information | | Validation |
| [Activity] | Sortable Column Header | | Sorts records |  |
| Total | Sortable Column Header | | Sorts records |  |
| Export to Excel | Link | Generates Excel version and returns to browser | |  |
| Export to PDF | Link | Generates PDF version and returns to browser | |  |
| Printable View | Link | Generates printable view | |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Tour Type & Sales Status by Account Executive (by Tours)

**Functional Description**

This matrix report returns a count of tours and sales statuses by community and lead source.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Text | Tour Type & Sales Status by Account Executive (by Tours) |  |
| **Filters** | | | |
| Date Range\* | Dropdown | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | |
| Account Executive Count | Text | Display a count of records found  Update count as filters are modified  Display verbiage as: Account Executives (# of results)  Example: Account Executives (14) |  |
| Account Executive | Text | Sortable  Descending order |  |
| [Tour Status] | Text | Sortable |  |
| Total Traffic | Text | Sortable  Total of all Tour Statuses |  |
| [Sales Status] | Text | Sortable  Descending order |  |
| Total Count | Text | Sortable  Total of all Sales Statuses |  |

**Actions or Controls**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | | Type | Additional Information | Validation | |
| [Tour Status] | Sortable Column Header | | Sortable | |  |
| Total Traffic | Sortable Column Header | | Sortable | |  |
| [Sales Status] | Sortable Column Header | | Sortable | |  |
| Total Count | Sortable Column Header | | Sortable | |  |
| Export to Excel | | Link | Generates Excel version and returns to browser |  | |
| Export to PDF | | Link | Generates PDF version and returns to browser |  | |
| Printable View | | Link | Generates printable view |  | |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None

# Tour Type & Sales Status by Account Executive (by Tours)

**Functional Description**

This matrix report returns a count of tours and sales statuses by community and lead source.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Text | Tour Type & Sales Status by Account Executive (by Tours) |  |
| **Filters** | | | |
| Date Range\* | Dropdown | Options include:   1. Last 7 days 2. Last Month 3. Last 3 Months 4. Month to Date 5. Year to Date 6. Last Year 7. Custom |  |
| Custom Date Range | Date Pickers | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Results** | | | |
| Account Executive Count | Text | Display a count of records found  Update count as filters are modified  Display verbiage as: Account Executives (# of results)  Example: Account Executives (14) |  |
| Account Executive | Text | Sortable  Descending order |  |
| [Tour Status] | Text | Sortable |  |
| Total Traffic | Text | Sortable  Total of all Tour Statuses |  |
| [Sales Status] | Text | Sortable  Descending order |  |
| Total Count | Text | Sortable  Total of all Sales Statuses |  |

**Actions or Controls**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | | Type | Additional Information | Validation | |
| [Tour Status] | Sortable Column Header | | Sortable | |  |
| Total Traffic | Sortable Column Header | | Sortable | |  |
| [Sales Status] | Sortable Column Header | | Sortable | |  |
| Total Count | Sortable Column Header | | Sortable | |  |
| Export to Excel | | Link | Generates Excel version and returns to browser |  | |
| Export to PDF | | Link | Generates PDF version and returns to browser |  | |
| Printable View | | Link | Generates printable view |  | |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

None