Reports Module

Table of Contents

1. [Reports List 2](#_Toc388540872)
2. [Create/Edit Custom Report 3](#_Toc388540873)
3. [Run Custom Report 7](#_Toc388540874)
4. [Campaign Report 8](#_Toc388540875)
5. [New Leads 8](#_Toc388540876)
6. [Traffic by Type 10](#_Toc388540877)
7. [Traffic by Source 13](#_Toc388540878)
8. [Traffic by Lifecycle 15](#_Toc388540879)
9. [Lifecycle Pipeline 18](#_Toc388540880)
10. [Hot List 20](#_Toc388540881)
11. [Campaign List 22](#_Toc388540882)
12. [Activity 24](#_Toc388540883)

# Reports List

**Functional Description**

This view displays standard and custom reports.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Link | Sortable |  |
| Tag | Text | List of tags associated with each report |  |
| Last Run | Text | Date last run by the current User  Sortable  Sort by default and in descending order |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Run/Edit Report | Icon | Associated with a record  Applies to custom reports |  |
| Duplicate Report | Icon | Associated with a record  Applies to custom reports |  |
| Delete Report | 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” |
| Showing | Dropdown | Filters list of Reports depending upon selection  Options include:   1. All Reports 2. SmartReports 3. Custom Reports 4. My Reports 5. Recently run | When ‘My Contacts’ is selected, return a list of Contacts assigned to the User. |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Report | Link |  |
| Run Report | Link | Visible if a report is selected in the list |
| Edit Report | Link | Visible if a report is selected in the list |
| Copy Report | Link | Visible if a report is selected in the list |
| Delete Report | Link | Visible if a report is selected in the list |

**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 |  |
| **Filters** | | | |
| Filter Logic | Dropdown | Options include:   1. AND 2. OR 3. Custom |  |
| Custom Logic | Textbox | Display if Filter Logic = Custom  Display between Filter Logic dropdown and Filter rows  Default to “AND” statements  Example: “1 AND 2 AND 3” |  |
| Custom Filter Number | Text | Row number for the Custom Filter | At least one Custom Filter is required |
| Custom Filter Field\* | Dropdown | Options include fields associated with the option selected | At least one Custom Filter is required |
| 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 | At least one Custom Filter is required |
| Custom Filter Search Value\* | Depends upon Selection | The type of input depends upon the Field selected | At least one Custom Filter is required |
| **Settings (pop-over)** | | | |
| Group by | Dropdown | Primary grouping applies to Tabular reports  Options include fields displayed in the Preview table |  |
| Group by Sort Order | Dropdown | Options include:   1. Ascending (A🡪Z) 2. Descending (Z🡪A) |  |
| And then by | Dropdown | Secondary grouping applies to Tabular and Matrix reports  Options include fields displayed in the Preview table |  |
| And then by Sort Order | Dropdown | Options include:   1. Ascending (A🡪Z) 2. Descending (Z🡪A) |  |
| Group Rows by | Dropdown | Applies to Matrix reports  Options include fields displayed in the Preview table |  |
| Group Rows by Sort Order | Dropdown | Options include:   1. Ascending (A🡪Z) 2. Descending (Z🡪A) |  |
| Group Columns by | Dropdown | Applies to Matrix reports  Options include fields displayed in the Preview table |  |
| Group Columns by Sort Order | Dropdown | Options include:   1. Ascending (A🡪Z) 2. Descending (Z🡪A) |  |
| 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  Tabular Reports may have multiple options, so display as checkboxes  Matrix Reports are mutually exclusive, so display as radio buttons |  |
| Summary Options | Checkbox or Radio Button | Checkbox options for Tabular Reports include:   1. Total 2. Average 3. Largest Value 4. Smallest Value |  |
| **Preview** | | | |
| Results | Grid | Select and display the first 25 results |  |
| Total Records | Text | Display a count of records found  Update count as filters are modified  Display verbiage as: Total Records: [# of 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 |  |
| [Report format] | Dropdown | Allows User to change format of report  Options include:   1. Tabular 2. Matrix   Default to Tabular Format  Disable Matrix Format until grouping is selected |  |
| Columns | Button with Dropdown | Dropdown containing a list of all available fields  Dropdown also includes search functionality  Preselect these fields:   1. Last Name 2. First Name 3. Email (Primary) 4. Phone (Primary) 5. [all other fields from Custom Filters]   Multiple values may be selected via checkbox  Selected fields may be reordered |  |
| Settings | Link or Button | Displays pop-over panel containing Settings |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Run Report | Link | Applies to reports with at least one filter |
| Save Report | Link | Applies to reports with at least one filter |
| Save Report As | Link | Applies to previously-saved reports  Group in dropdown with Save Report |

**Exceptions**

None

**Notes and Issues**

None

# Run Custom Report

**Functional Description**

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

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Text |  |  |
| Tag(s) | Icon |  |  |
| **Filters (accordion)** | | | |
| Filter Logic | Text |  |  |
| 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 |  |
| **Results** | | | |
| Total Records | Text | Display a count of records found  Display verbiage as: Total Records: [# of results] |  |
| Results | Grid |  |  |
| Total Records | Text | Display a count of records found  Display verbiage as: Total Records: [# of results] |  |

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Edit Report | Link |  |
| Save Report | Link |  |
| Save Report As | Link | Group in dropdown with Save Report |
| Export Report | Link | Dropdown containing options to export to Excel or PDF |
| Export to Excel | Link | Generates Excel version and returns to browser |
| Export to PDF | Link | Generates PDF version and returns to browser |

**Exceptions**

None

**Notes and Issues**

None

# Campaign Report

**Functional Description**

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

# New Leads

**Functional Description**

This tabular report returns a list of new leads.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | New Leads |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Compare to | Checkbox | | Not selected by default |  |
| Comparison | Dropdown | | Options include:   1. previous period (default) 2. previous year |  |
| Account Executive | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| **Results** | | | | |
| Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: [# of results] New Leads  Example: 14 New Leads |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| Lead Source | Text | First Lead Source | |  |
| Lifecycle | Text |  | |  |
| Created | Text | Creation date for Contact | |  |
| Account Executive | 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**

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

**Exceptions**

None

**Notes and Issues**

1. Display New Leads chart and Top 5 Lead Sources chart

# Traffic by Type

**Functional Description**

This matrix report returns traffic by type.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic by Type |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Compare to | Checkbox | | Not selected by default |  |
| Comparison | Dropdown | | Options include:   1. previous period (default) 2. previous year |  |
| Group By | Dropdown | | Options include:   1. Community (default) 2. Account Executive |  |
| [Community or Account Executive] | Multi-select Dropdown | | Options include:   1. All 2. [list of Communities or Account Executives (depending on previous selection)] |  |
| Traffic Types | Multi-select Dropdown | | Options include:   1. All 2. [list of Traffic Types] |  |
| **Results** | | | | |
| [Community or Account Executive] | Text | | Rows | Y-axis  Name first column for the option selected in Group By (either Community or Account Executive) |  |
| [Traffic Types] | Text | Columns | X-axis  Create and name one column per Traffic Type selected | |  |
| Count | Link | Sum of all Traffic Types for each Community or Account Executive (depends upon the option selected in Group By)  Link Count to Contact List containing Contacts that comprise that value | |  |
| Total | Link | Total rows and columns | |  |
| **Contact List** | | | | |
| Count | Text | | Display a count of records found  Display verbiage as: [# of results] Contacts  Example: 14 Contacts |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| [Community or Account Executive] | Text | Community or Account Executive (depends upon the option selected in Group By) | |  |
| Traffic Type | 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 |  |
| Back to Traffic by Type Report | Link | Applies to Contact List |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

1. Display Traffic chart and Traffic Type chart

# Traffic by Source

**Functional Description**

This matrix report returns traffic by source.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic by Source |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Compare to | Checkbox | | Not selected by default |  |
| Comparison | Dropdown | | Options include:   1. previous period (default) 2. previous year |  |
| Group By | Dropdown | | Options include:   1. Community (default) 2. Account Executive |  |
| [Community or Account Executive] | Multi-select Dropdown | | Options include:   1. All 2. [list of Communities or Account Executives (depending on previous selection)] |  |
| Traffic Types | Multi-select Dropdown | | Options include:   1. All 2. [list of Traffic Types] |  |
| **Results** | | | | |
| [Community or Account Executive] | Text | | Rows | Y-axis  Name first column for the option selected in Group By (either Community or Account Executive) |  |
| [Lead Sources] | Text | Columns | X-axis  Create and name one column per Lead Source associated with Contacts with Traffic | |  |
| Count | Link | Sum of all Traffic for each Community or Account Executive (depends upon the option selected in Group By)  Link Count to Contact List containing Contacts that comprise that value | |  |
| Total | Link | Total rows and columns | |  |
| **Contact List** | | | | |
| Count | Text | | Display a count of records found  Display verbiage as: [# of results] Contacts  Example: 14 Contacts |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| [Community or Account Executive] | Text | Community or Account Executive (depends upon the option selected in Group By) | |  |
| Traffic Source | Text | List of all Lead Sources associated with the Contact | |  |

**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 |  |
| Back to Traffic by Source Report | Link | Applies to Contact List |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

1. Display Traffic chart and Traffic Type chart

# Traffic by Lifecycle

**Functional Description**

This matrix report returns traffic by lifecycle.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Traffic by Lifecycle |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Compare to | Checkbox | | Not selected by default |  |
| Comparison | Dropdown | | Options include:   1. previous period (default) 2. previous year |  |
| Group By | Dropdown | | Options include:   1. Community (default) 2. Account Executive |  |
| [Community or Account Executive] | Multi-select Dropdown | | Options include:   1. All 2. [list of Communities or Account Executives (depending on previous selection)] |  |
| Traffic Types | Multi-select Dropdown | | Options include:   1. All 2. [list of Traffic Types] |  |
| Lifecycles | Multi-select Dropdown | | Options include:   1. All 2. [list of Lifecycles] |  |
| **Results** | | | | |
| [Community or Account Executive] | Text | | Rows | Y-axis  Name first column for the option selected in Group By (either Community or Account Executive) |  |
| [Lifecycles] | Text | Columns | X-axis  Create and name one column per Lifecycle associated with Contacts with Traffic | |  |
| Count | Link | Sum of all Traffic for each Community or Account Executive (depends upon the option selected in Group By)  Link Count to Contact List containing Contacts that comprise that value | |  |
| Total | Link | Total rows and columns | |  |
| **Contact List** | | | | |
| Count | Text | | Display a count of records found  Display verbiage as: [# of results] Contacts  Example: 14 Contacts |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| [Community or Account Executive] | Text | Community or Account Executive (depends upon the option selected in Group By) | |  |
| Traffic Type | Text |  | |  |
| Lifecycle | 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 |  |
| Back to Traffic by Lifecycle Report | Link | Applies to Contact List |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

1. Display Traffic chart and Top 5 Lifecylces chart

# Lifecycle Pipeline

**Functional Description**

This matrix report returns pipeline by lifecycle.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Lifecycle Pipeline |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Group By | Dropdown | | Options include:   1. Community (default) 2. Account Executive |  |
| [Community or Account Executive] | Multi-select Dropdown | | Options include:   1. All 2. [list of Communities or Account Executives (depending on previous selection)] |  |
| Lifecycles | Multi-select Dropdown | | Options include:   1. All 2. [list of Lifecycles] |  |
| **Results** | | | | |
| [Community or Account Executive] | Text | | Rows | Y-axis  Name first column for the option selected in Group By (either Community or Account Executive) |  |
| [Lifecycles] | Text | Columns | X-axis  Create and name one column per Lifecycle associated with Contacts with Traffic | |  |
| Count | Link | Sum of Contacts by Pipeline for each Community or Account Executive (depends upon the option selected in Group By)  Link Count to Contact List containing Contacts that comprise that value | |  |
| Total | Link | Total rows and columns | |  |
| **Contact List** | | | | |
| Count | Text | | Display a count of records found  Display verbiage as: [# of results] Contacts  Example: 14 Contacts |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| [Community or Account Executive] | Text | Community or Account Executive (depends upon the option selected in Group By) | |  |
| Lifecycle | 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 |  |
| Back to Lifecycle Pipeline Report | Link | Applies to Contact List |  |

**Navigation Options**

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

**Exceptions**

None

**Notes and Issues**

1. Display Lifecycle Pipeline chart

# Hot List

**Functional Description**

This tabular report returns a list of hot leads.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | New Leads |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Account Executive | Multi-select Dropdown | | Options include:   1. All (default) 2. [Account Executives] |  |
| Lifecycle | Multi-select Dropdown | | Options include:   1. All (default) 2. [Lifecycles] |  |
| Show | Dropdown | | Options include:   1. All 2. Top 10 (default) 3. Top 25 4. Top 50 |  |
| **Results** | | | | |
| Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: [# of results] Hot Contacts  Example: 14 Hot Contacts |  |
| Name | Link | Concatenate First Name and Last Name  Link to Contact’s record | |  |
| Phone | Text | Primary Phone Number | |  |
| Email Address | Link | Primary Email Address  Link to Email form | |  |
| Lead Source | Text | First Lead Source | |  |
| Lifecycle | Text |  | |  |
| Lead Score | Text |  | |  |
| New Points | Text | Lead Score points accumulated during the specified period. | |  |

**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**

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

**Exceptions**

None

**Notes and Issues**

None

# Campaign List

**Functional Description**

This tabular report returns a list of recently-sent campaigns.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | New Leads |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Show | Dropdown | | Options include:   1. All 2. Top 5 3. Top 10 (default) 4. Top 25 |  |
| **Results** | | | | |
| Count | Text | | Display a count of records found  Update count as filters are modified  Display verbiage as: [# of results] Campaigns  Example: 14 Campaigns |  |
| Campaigns | Link | Link to Campaign record | |  |
| Open Rate | Text | Opened/Delivered  Delivered = Sent – Bounced  Display as percentage | |  |
| Click Rate | Text | Clicked/Delivered  Delivered = Sent – Bounced  Display as percentage | |  |

**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**

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

**Exceptions**

None

**Notes and Issues**

None

# Activity

**Functional Description**

This matrix report returns activity by Account Executive.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Report Name | Text | | Activity |  |
| **Filters** | | | | |
| Date Range\* | Dropdown | | Options include:   1. Last 7 days 2. Last 30 Days (default) 3. Last Week 4. Last Month 5. Last 3 Months 6. Month to Date 7. Year to Date 8. Last Year 9. Custom |  |
| Custom Date Range | Date Pickers | | If Time Period = Custom, then display Custom Date Range  Allows user to select a range of dates |  |
| Account Executive | Multi-select Dropdown | | Options include:   1. All 2. [list of Account Executives] |  |
| Activities | Multi-select Dropdown | | Options include:   1. All 2. [list of Tags associated with Activities and Traffic Types] |  |
| **Results** | | | | |
| Account Executive | Text | | Rows | Y-axis |  |
| [Lifecycles] | Text | Columns | X-axis  Create and name one column per Activity | |  |
| Count | Text | Sum of all Activities for each Account Executive | |  |
| Total | Link | Total rows and columns | |  |

**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**

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

**Exceptions**

None

**Notes and Issues**

None