Report List

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- Asset Additional Information Report
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- Debtor Interactions
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- Time Log Audit as Per Employee
- Time Log Employee Summary of Hours Logged
- Time Log Report
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- Time Log Task Values
- Time Log Transaction
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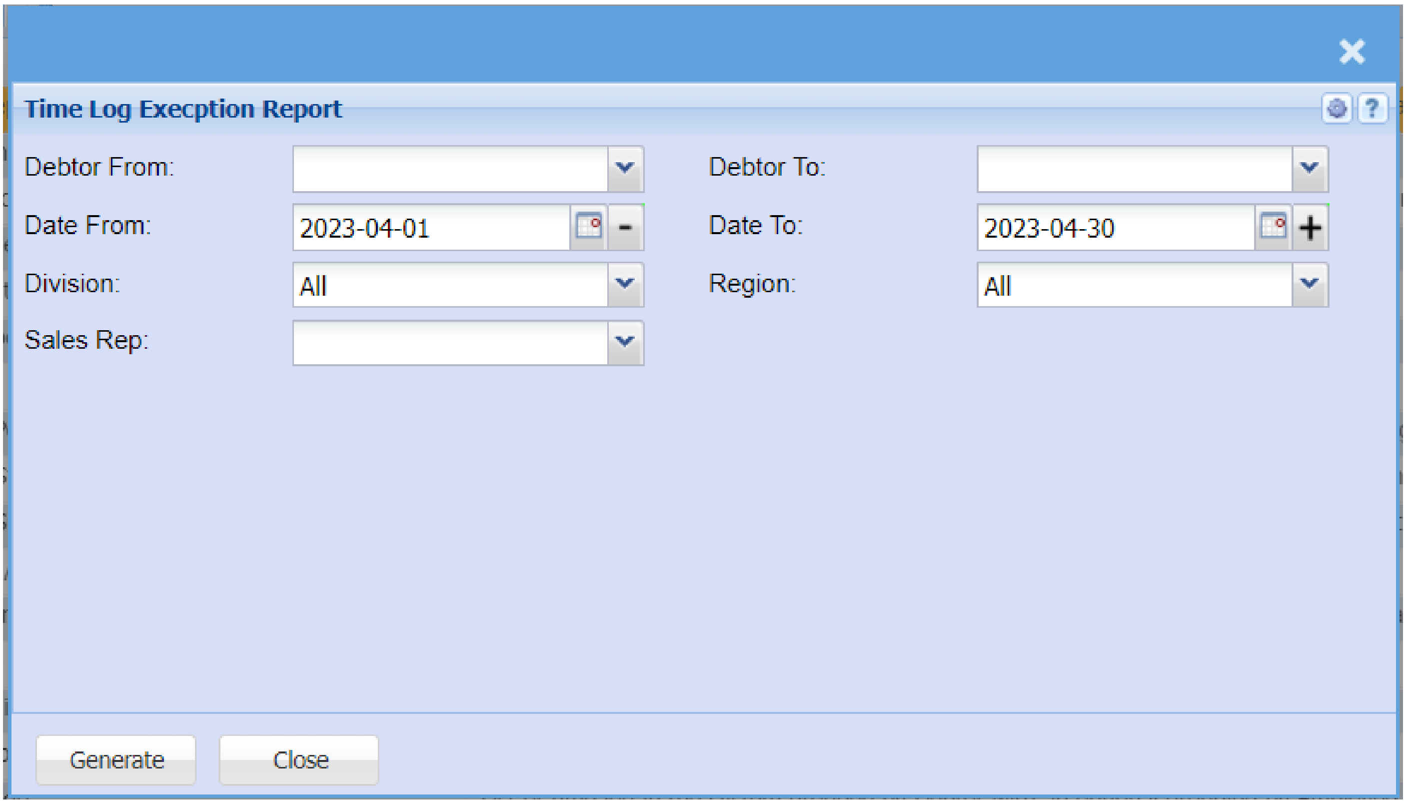
Time Log Exception Report

CRM> Reports> Report List

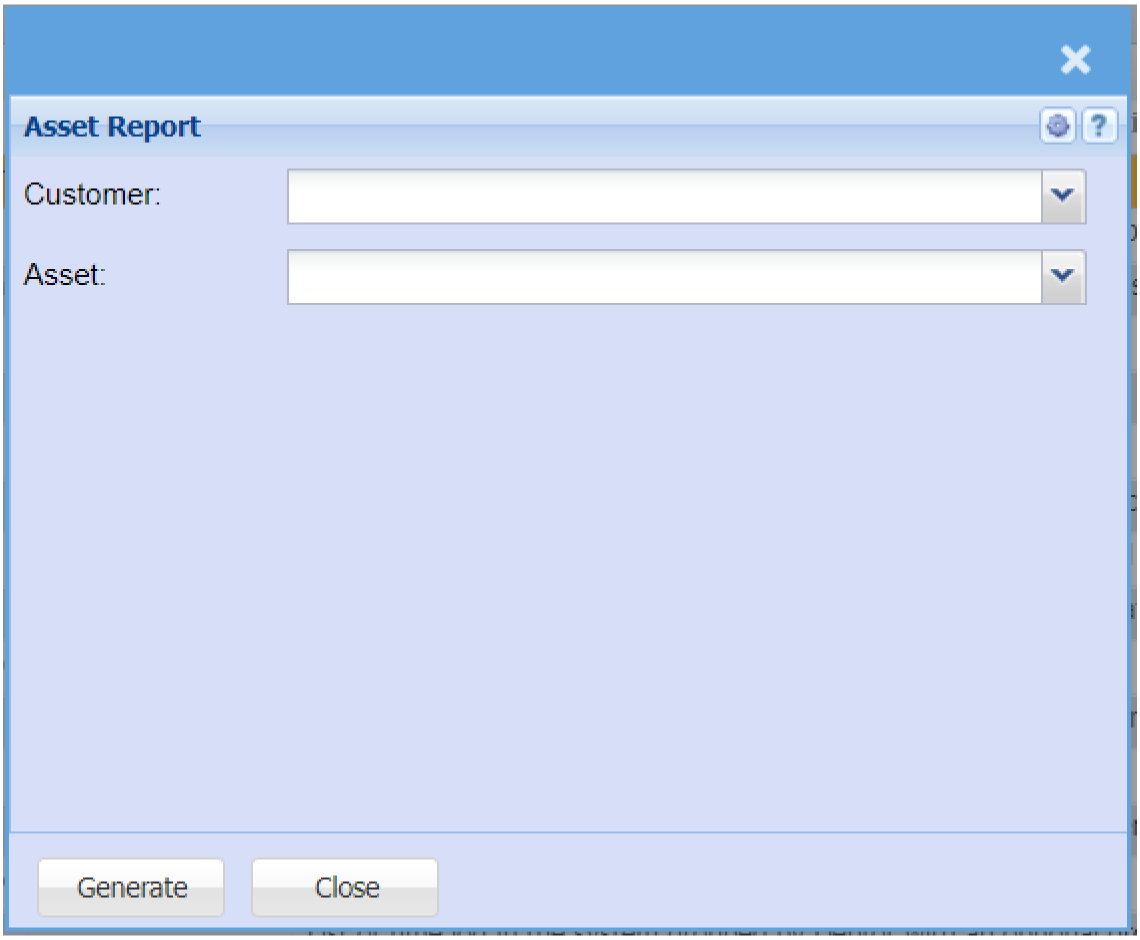


Debtor From	
Date From	
Division	
Sales Rep	
Debtor To	
Date To	
Region	

Asset Additional Information Report

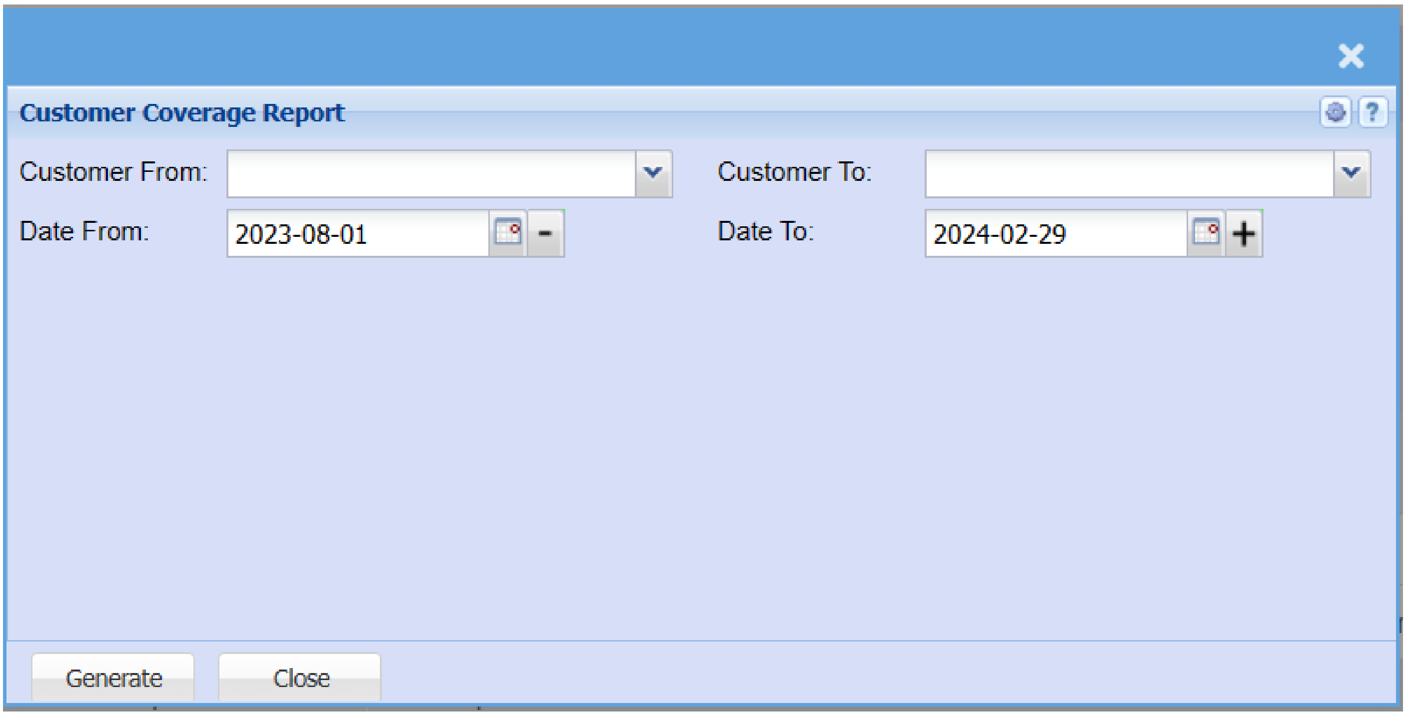
CRM> Reports> Report List

This report generates details prior to asset details in terms of what has been implemented on the generic branch table located in system configuration.
The form generates details which are depicted in the table found in system config example make, brand, track it number, serial no, etc.
A list of all items linked to the customer will be generated will the asset item number assigned to each item.



Customer	
Asset	

Customer Coverage Report

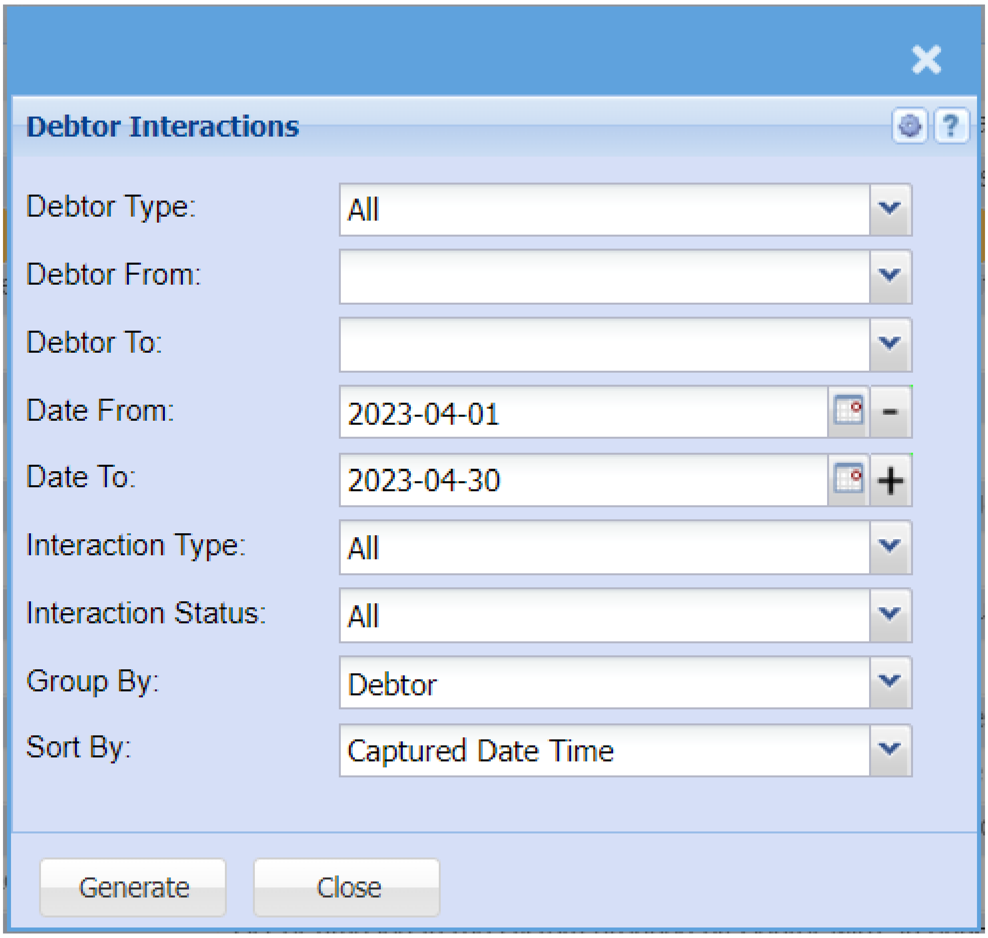


Customer From	
Date From	
Customer To	
Date To	

Debtor Interactions

CRM> Reports> Report List

This report shows all the interactions with Debtors, Prospects or opportunities. This report can be grouped by Debtor, Contact person or interaction type as well as Interaction Status.



This is a report on the interaction between the user and the customers
To run the report, select from the following fields:

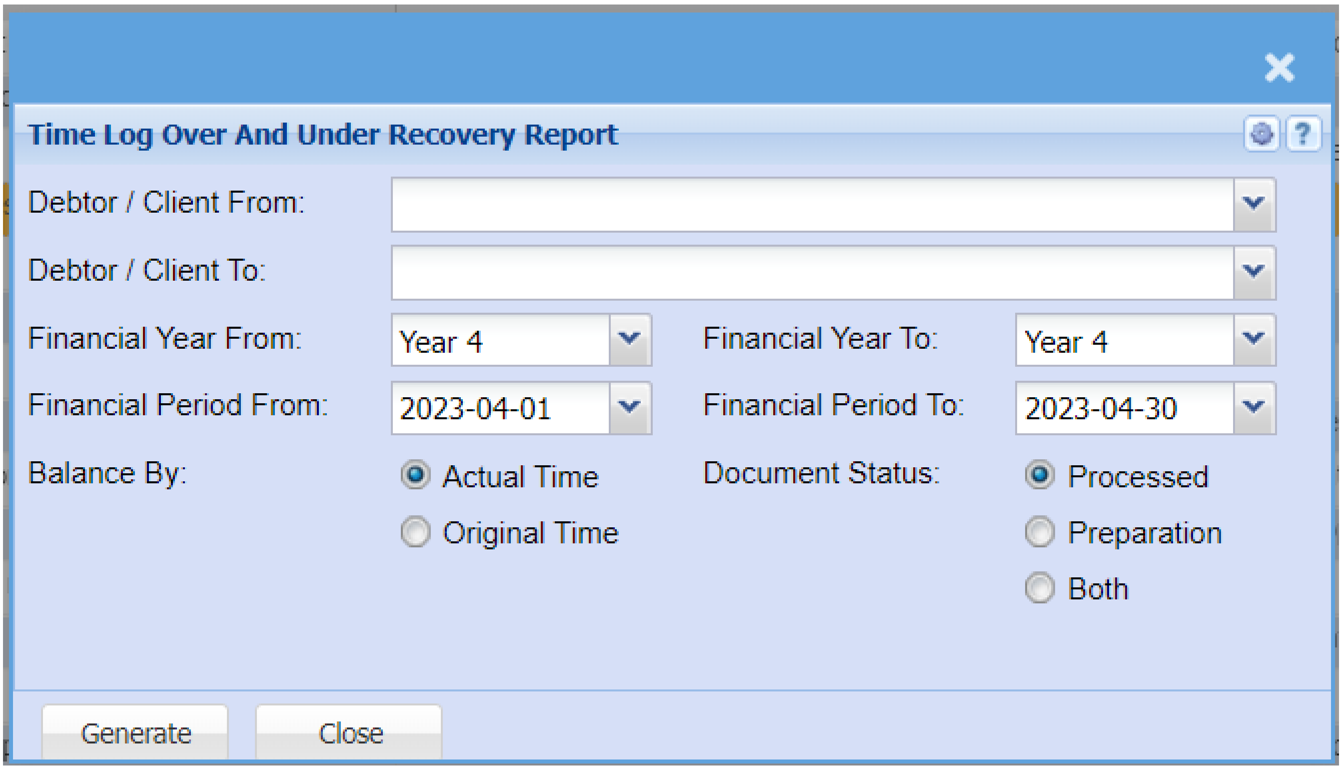
Debtor Type	select the debtor's type from the drop down arrow
Debtor From	select the debtor from or leave it blank
Debtor To	select the debtor to or leave it blank
Date From	select the date from which the report will run from.
Date To	select the date to which the report will run from.
Interaction Type	select the interaction type from the drop down arrow
Interaction Status	select the interaction status from the drop down arrow

Group By	group the report by selection either a debtor or contact person or interaction
Sort By	sort the report by selecting one option from the drop down arrow

Over and Under Recoveries on Time Sheets

CRM> Reports> Report List

Over and Under Recoveries on Time Sheet Invoices and Credit Notes.

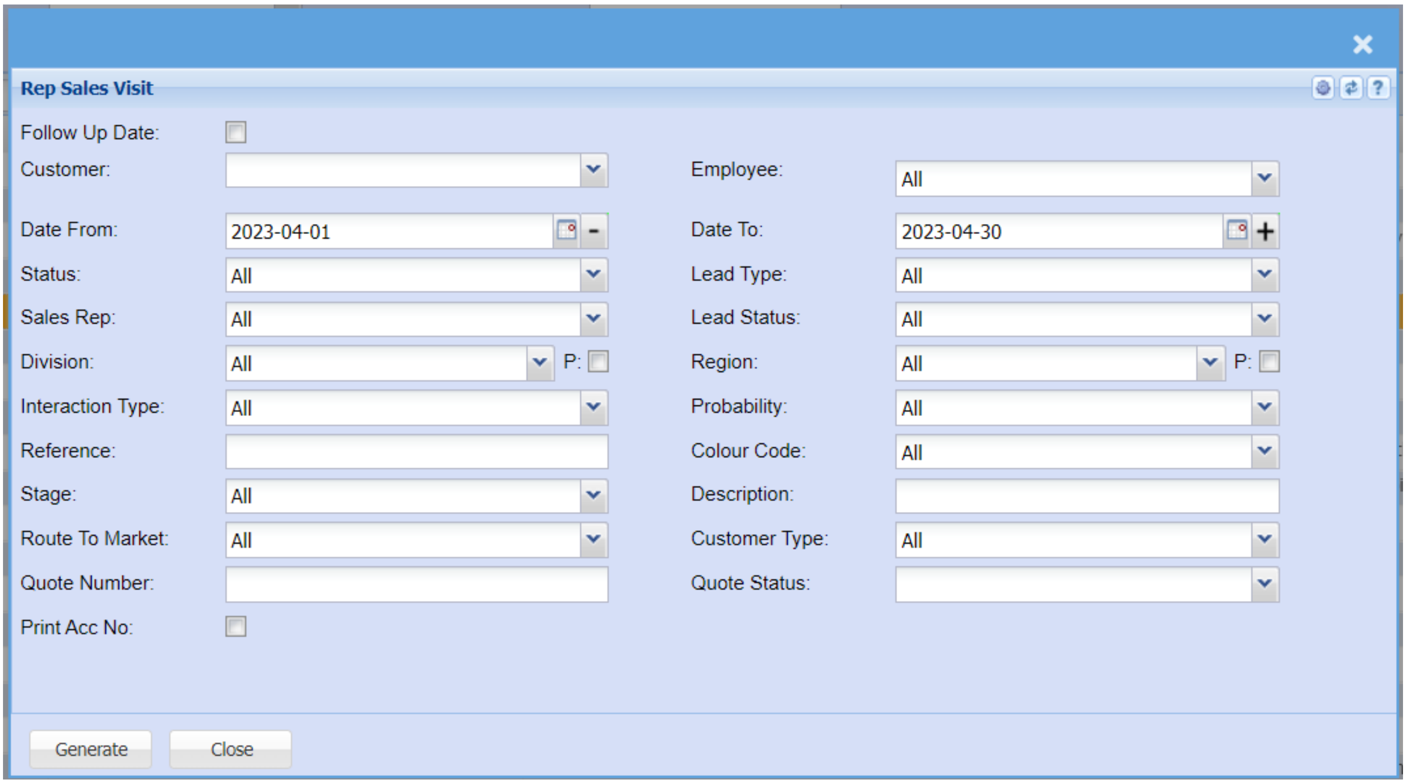


Debtor / Client From	
Debtor / Client To	
Financial Year From	
Financial Year To	
Financial Period From	
Financial Period To	
Balance By - Actual Time or Original Time	
Document Status - Processed, Preparation or Both	

Rep Sales Visit Report

CRM> Reports> Report List

This report shows a list of assets linked to a customer

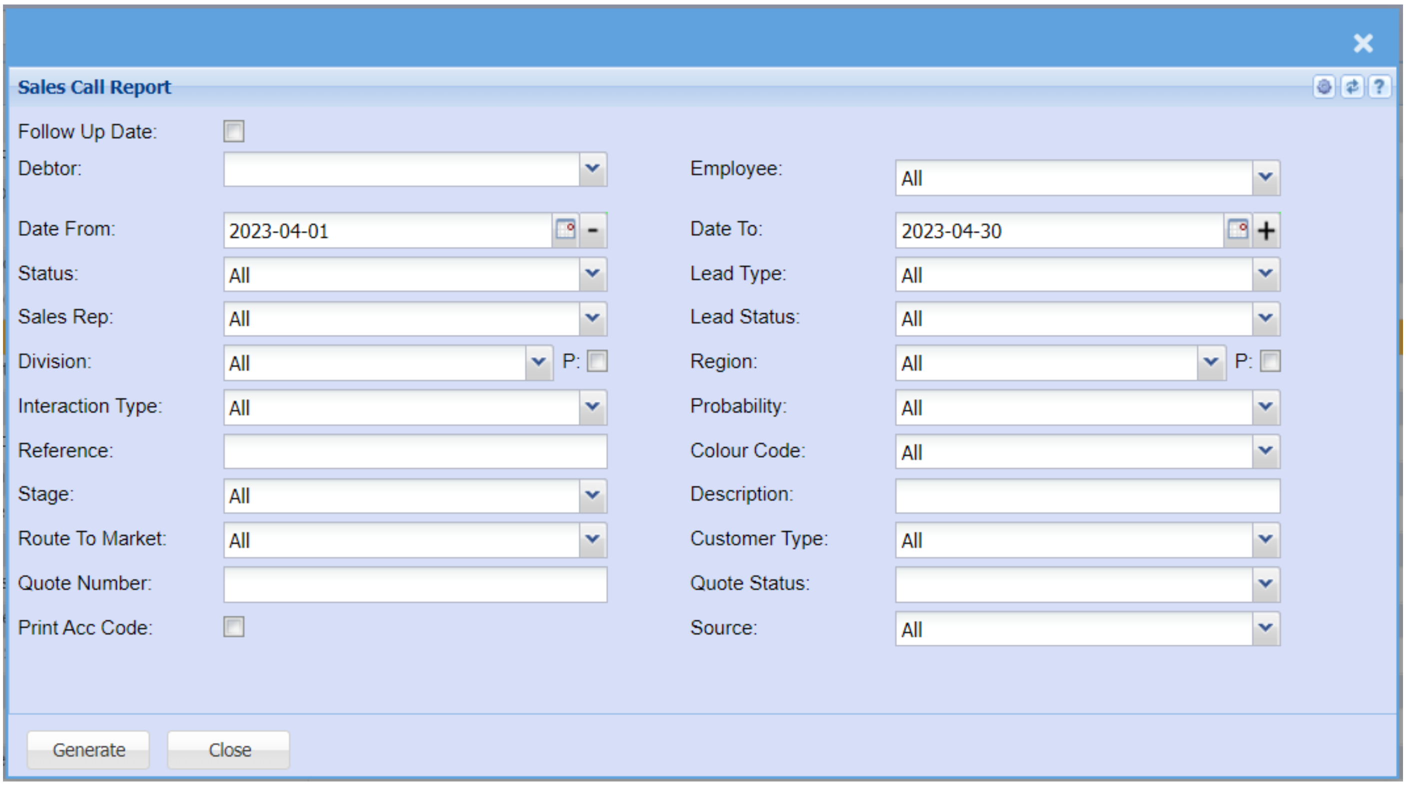


Follow Up Date	
Customer	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Print Acc No	
Employee	

Date To	
Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

Sales Call Report

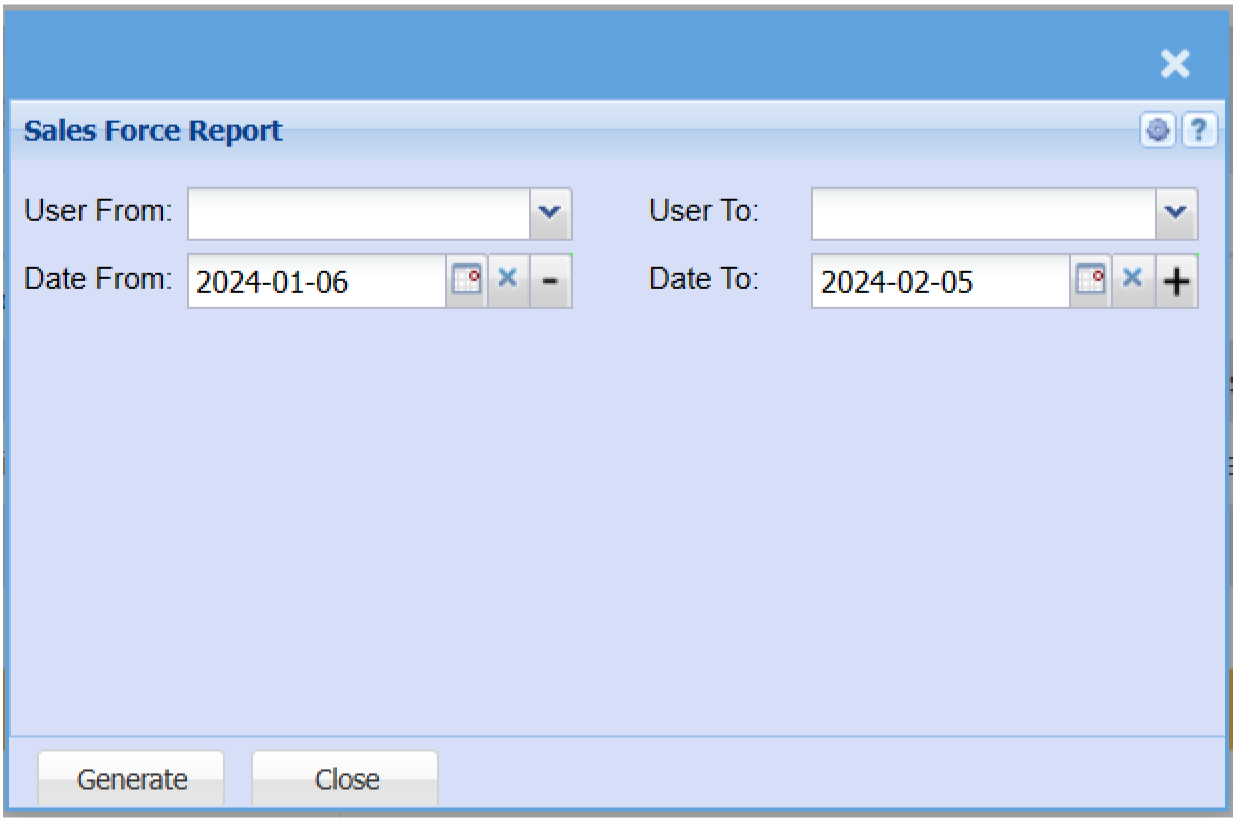
CRM> Reports> Report List



Follow Up Date	
Debtor	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Print Acc No	
Employee	
Date To	

Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

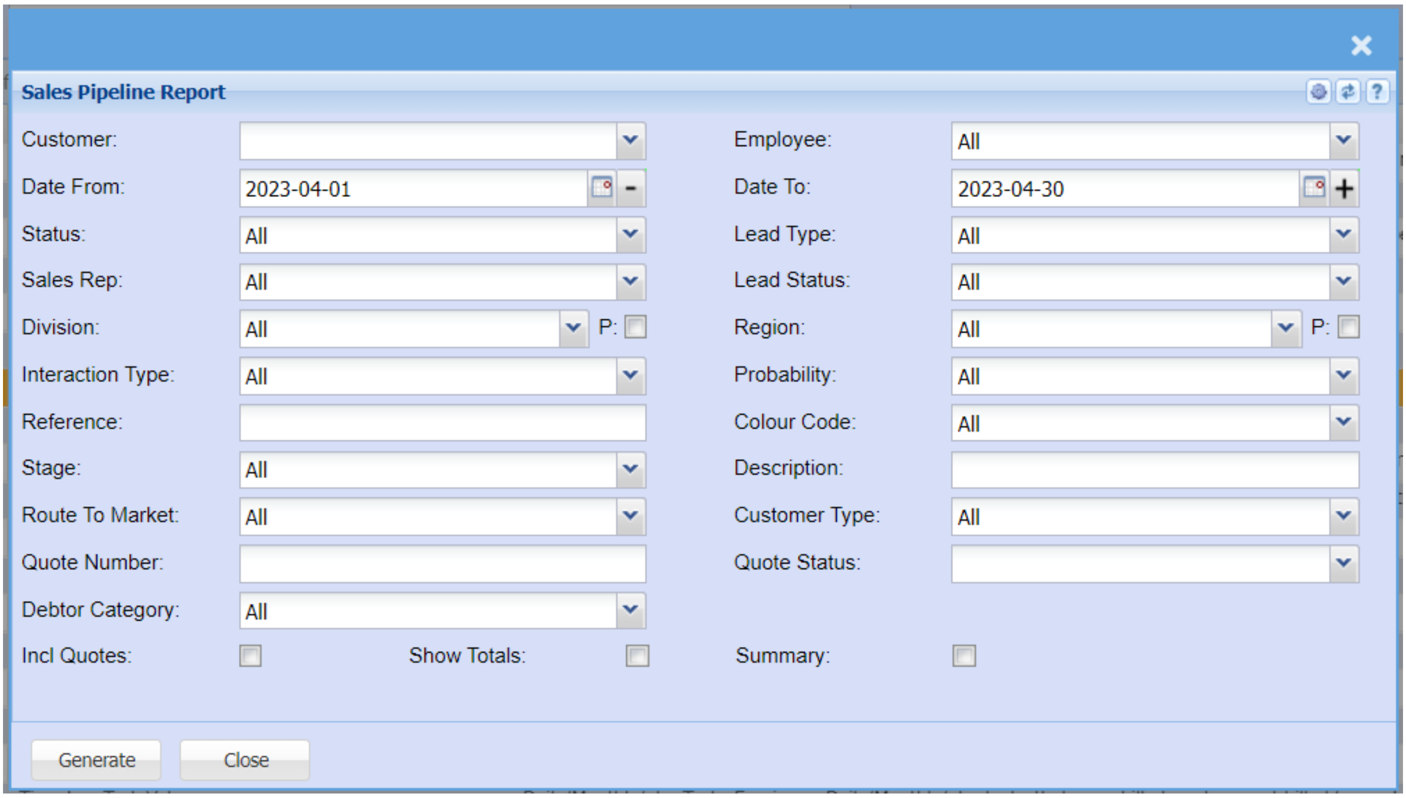
Sales Force Report



User From	
User To	
Date From	
Date To	

Sales Pipeline Report

CRM> Reports> Report List

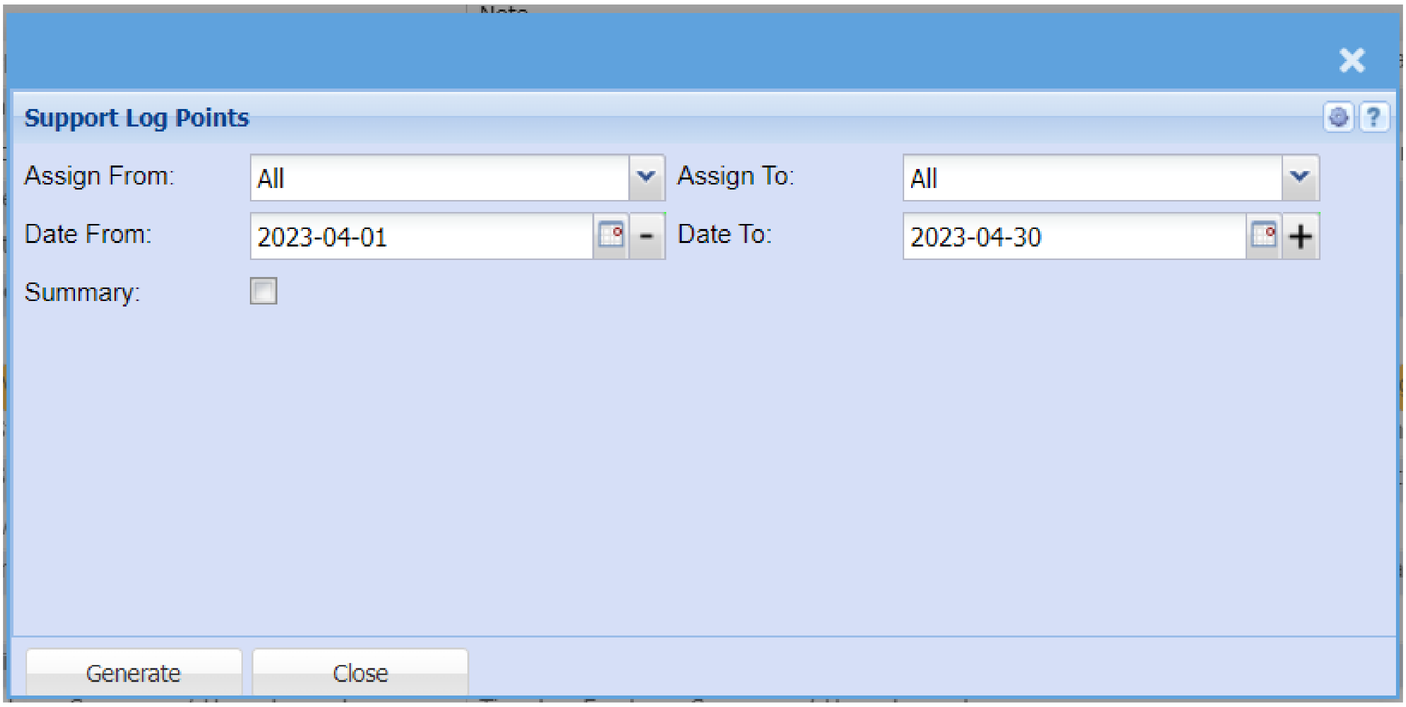


Customer	
Date From	
Status	
Sales Rep	
Division	
Interaction Type	
Reference	
Stage	
Route To Market	
Quote Number	
Debtor Category	
Incl Quotes	
Show Totals	
Summary	

Employee	
Date To	
Lead Type	
Lead Status	
Region	
P: Tick	
Probability	
Colour Code	
Description	
Customer Type	
Quote Status	

Support Log Points

CRM> Reports> Report List

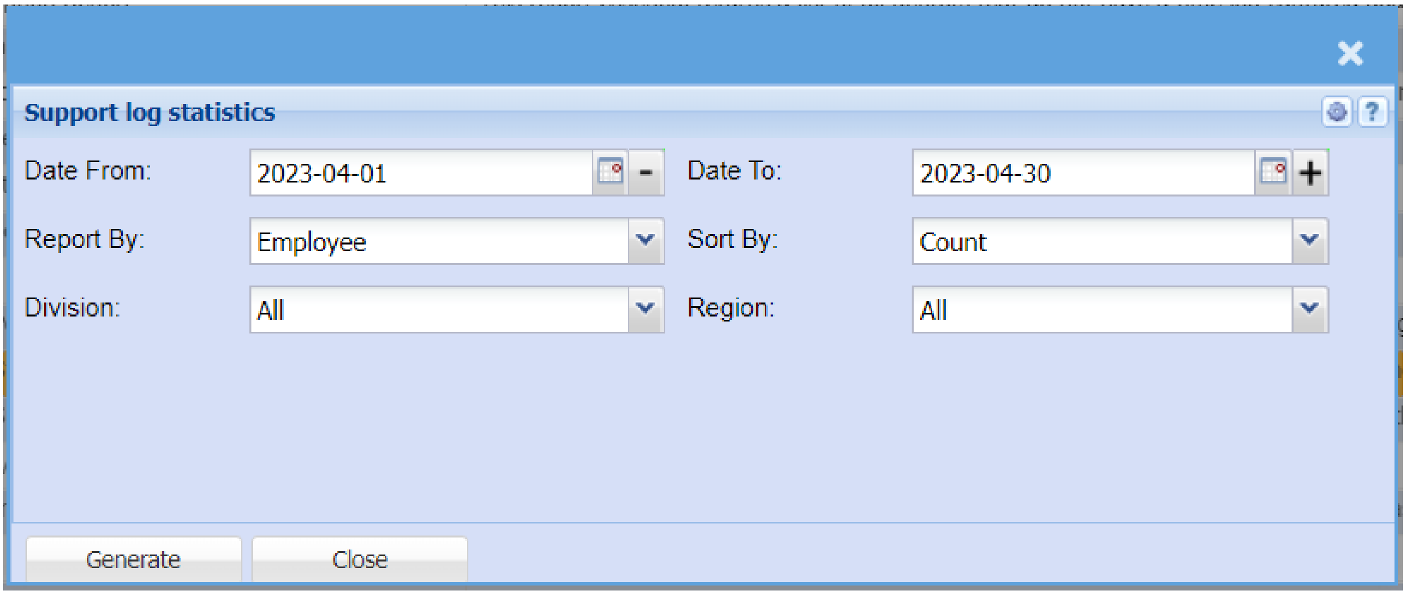


Assign From	
Assign To	
Date From	
Date To	
Summary Tick	

Support Log Statistic Report

CRM> Reports> Report List

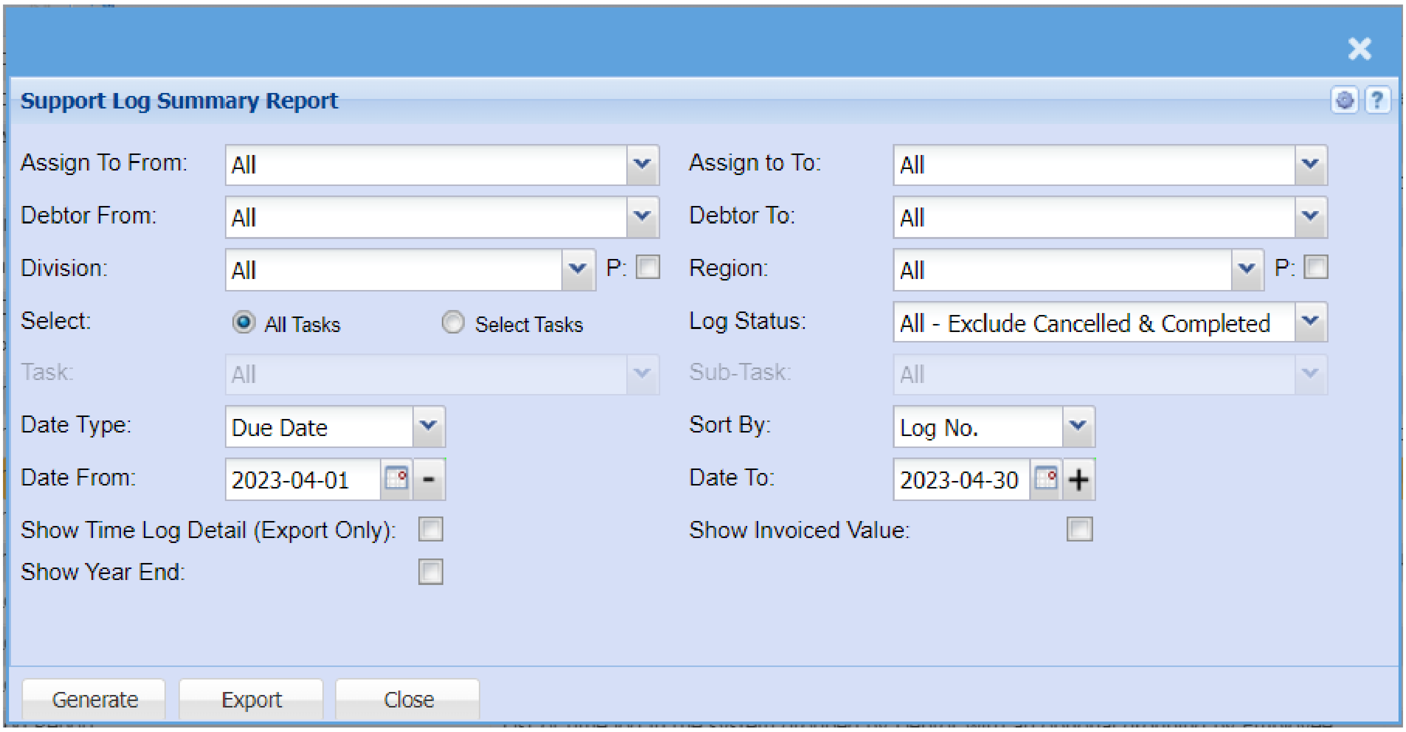
This report provides a count of the support logs captured within the Date range specified.
Ideally, if all jobs/Call outs are Logged, then this will represent the quantity of Job received within the given date range.
The report can be sorted by Employee or Task
To Generate, double click on the report and enter the required criteria.
Click Generate
Provides statistics on support logs.
Report By: Choose between Employee, Task, Root cause, Status, customer or percentage complete



Support Log Summary

CRM> Reports> Report List

This report will provide a summary of all Support logs captured within the specified date range and show a percentage progress or completion of the Job. It also shows any Accounted budget time versus actual time spent on the job.



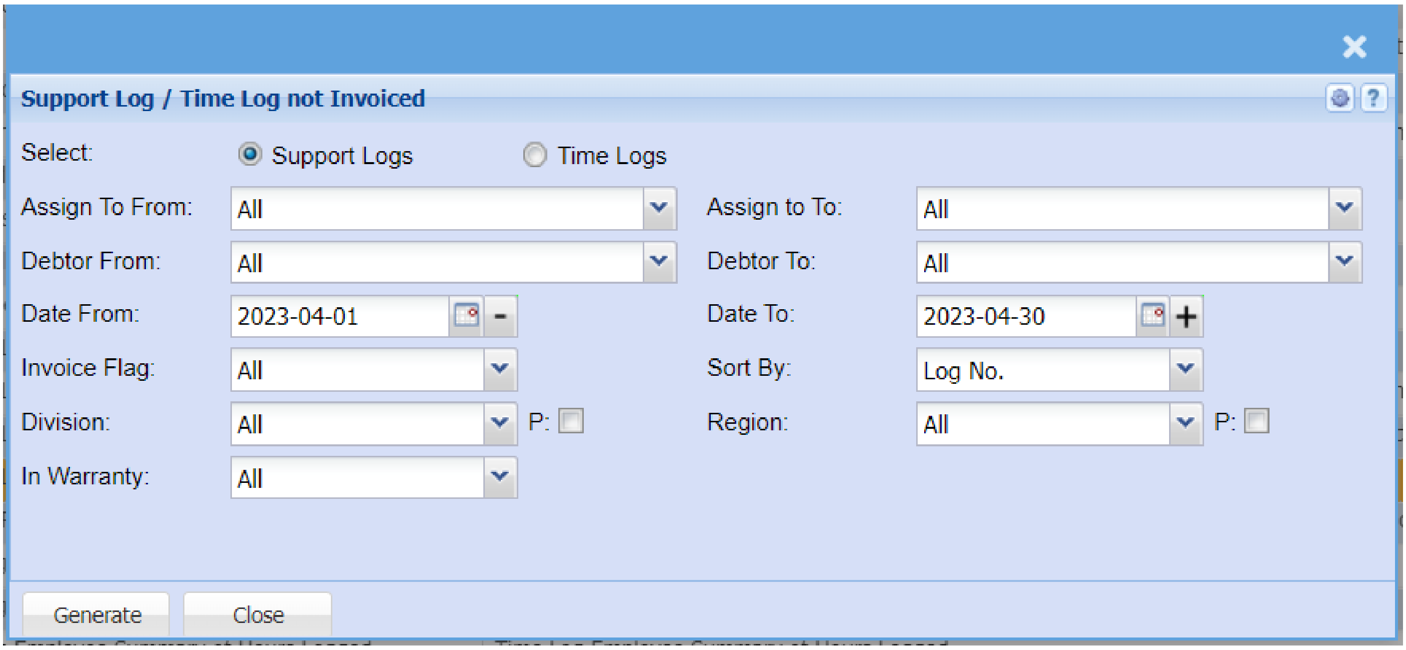
Assign To From	
Debtor From	
Division	
Select	
Task	
Date Type	
Date From	
Show Time Log Detail (Export Only) Tick	
Show Year End Tick	
Assign to To	
Debtor To	
Region	

Log Status	
Sub-Task	
Sort By	
Date To	
Show Invoiced Value Tick	

Support Logs / Time Logs not Invoiced

CRM> Reports> Report List

This report shows the time logs not invoiced or flagged for invoicing

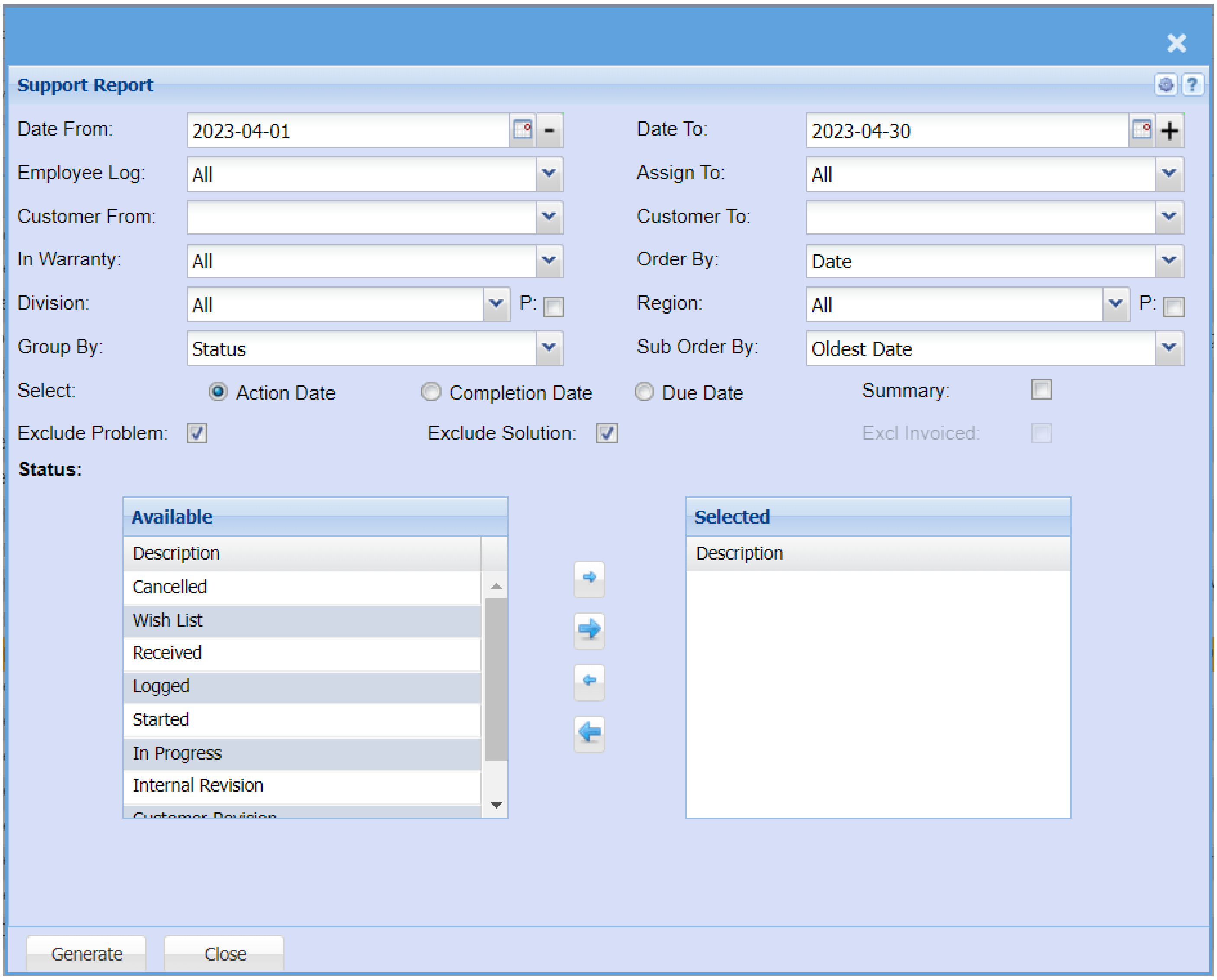


Select - Support Logs or Time Logs	
Assign To From	
Debtor From	
Date From	
Invoice From	
Invoice Flag	
Division	
In Warranty	
Assign to To	
Debtor To	
Date To	
Sort By	
Region	

Support Report

CRM> Reports> Report List

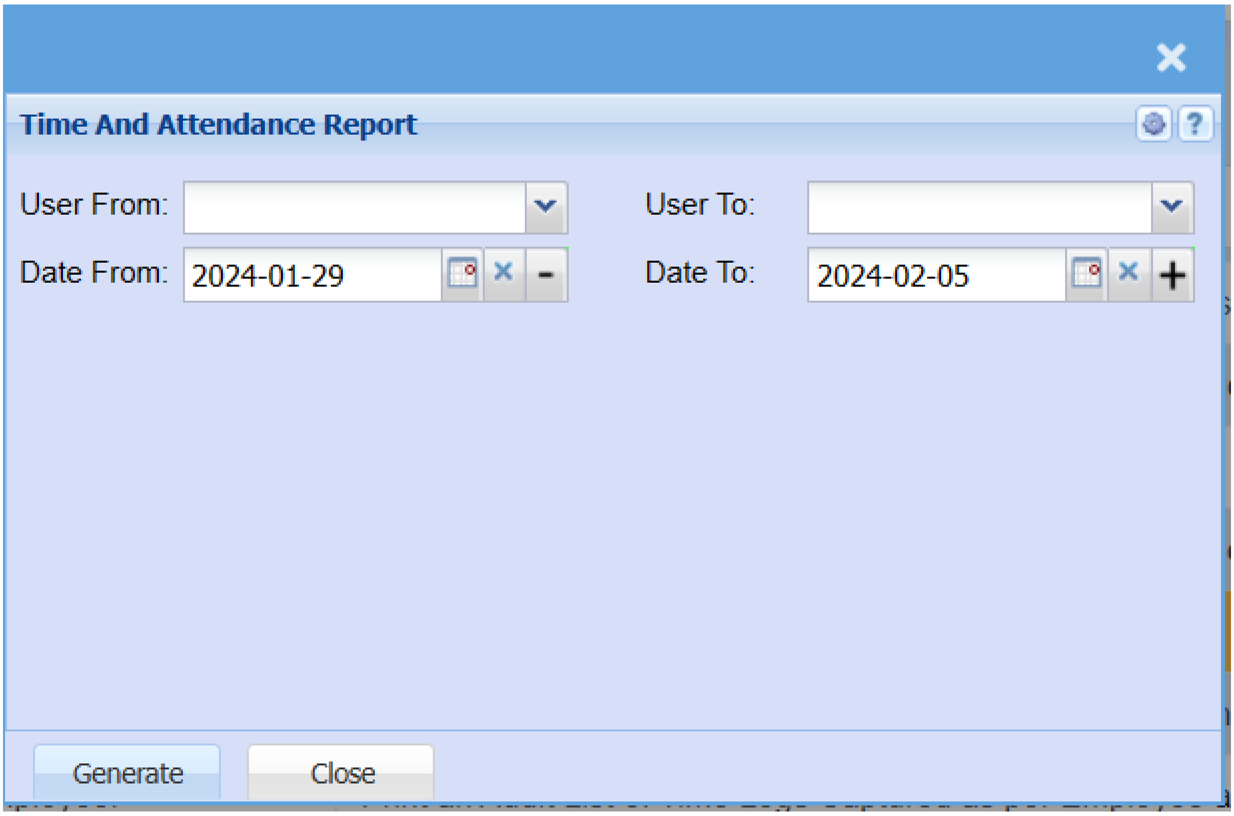
This report shows the detail of all support logs captured within the date range specified. In a list format, one can see all support logs captured and all related information on each support log, without having to open each log individually to ascertain respective problems/solutions. The report can be generated per employee or per debtor or accumulatively.



Date From	
Employee Log	
Customer From	
In Warranty	
Division	

Group By	
Date To	
Assign To	
Customer To	
Order By	
Region	
Sub Order By	
Select - Action Date, Completion Date, Due Date	
Summary Tick	
Exclude Problem Tick	
Exclude Solution Tick	
Excl Invoiced Tick	
Status:	From the available column, select the ones that will appear on the report by moving them to the right-hand side column.

Time And Attendance Report

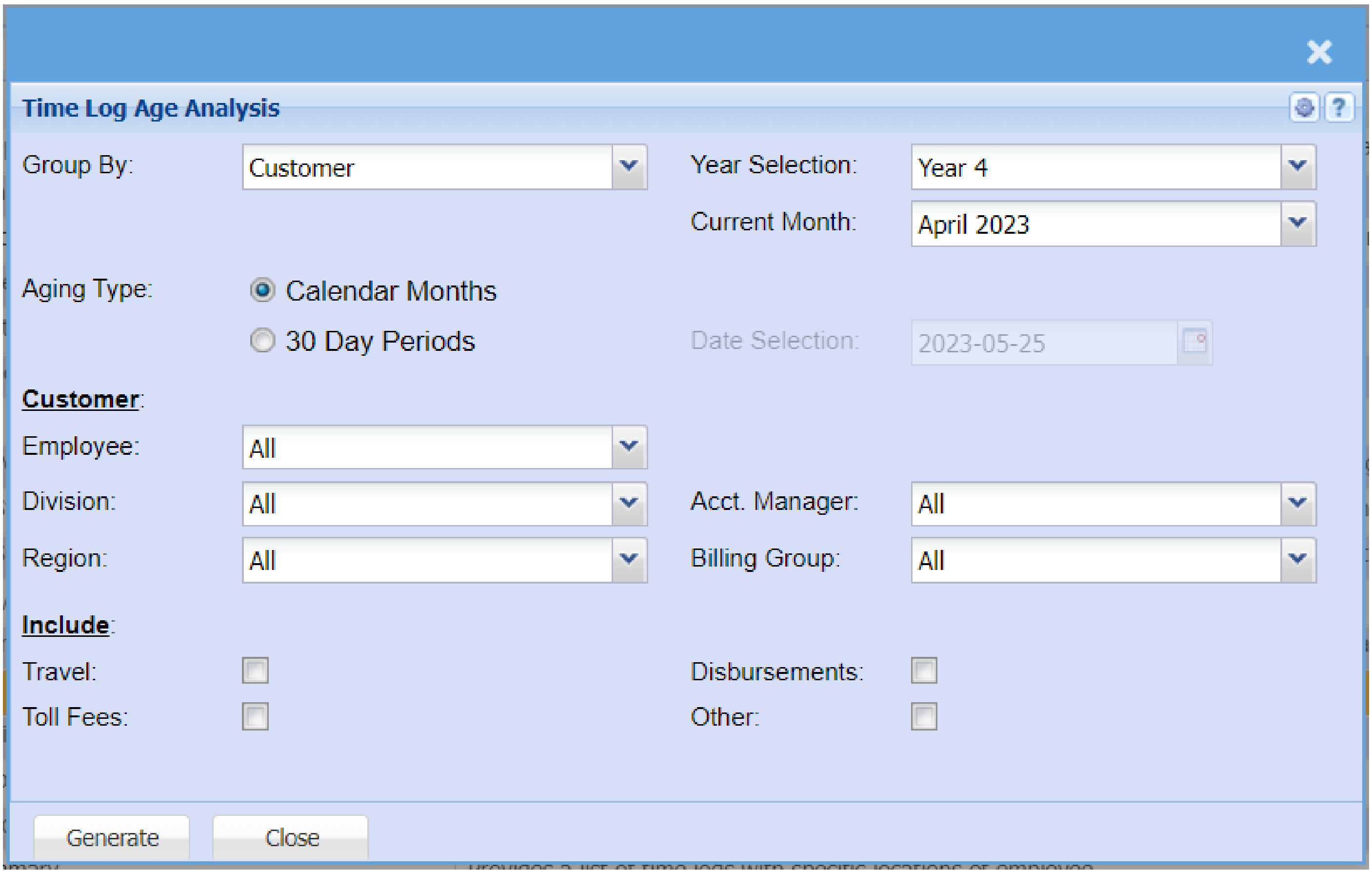


User From	
User To	
Date From	
Date To	

Time Log Age Analysis

CRM> Reports> Report List

Shows an age analysis of all time logs not archived as per the users criteria.



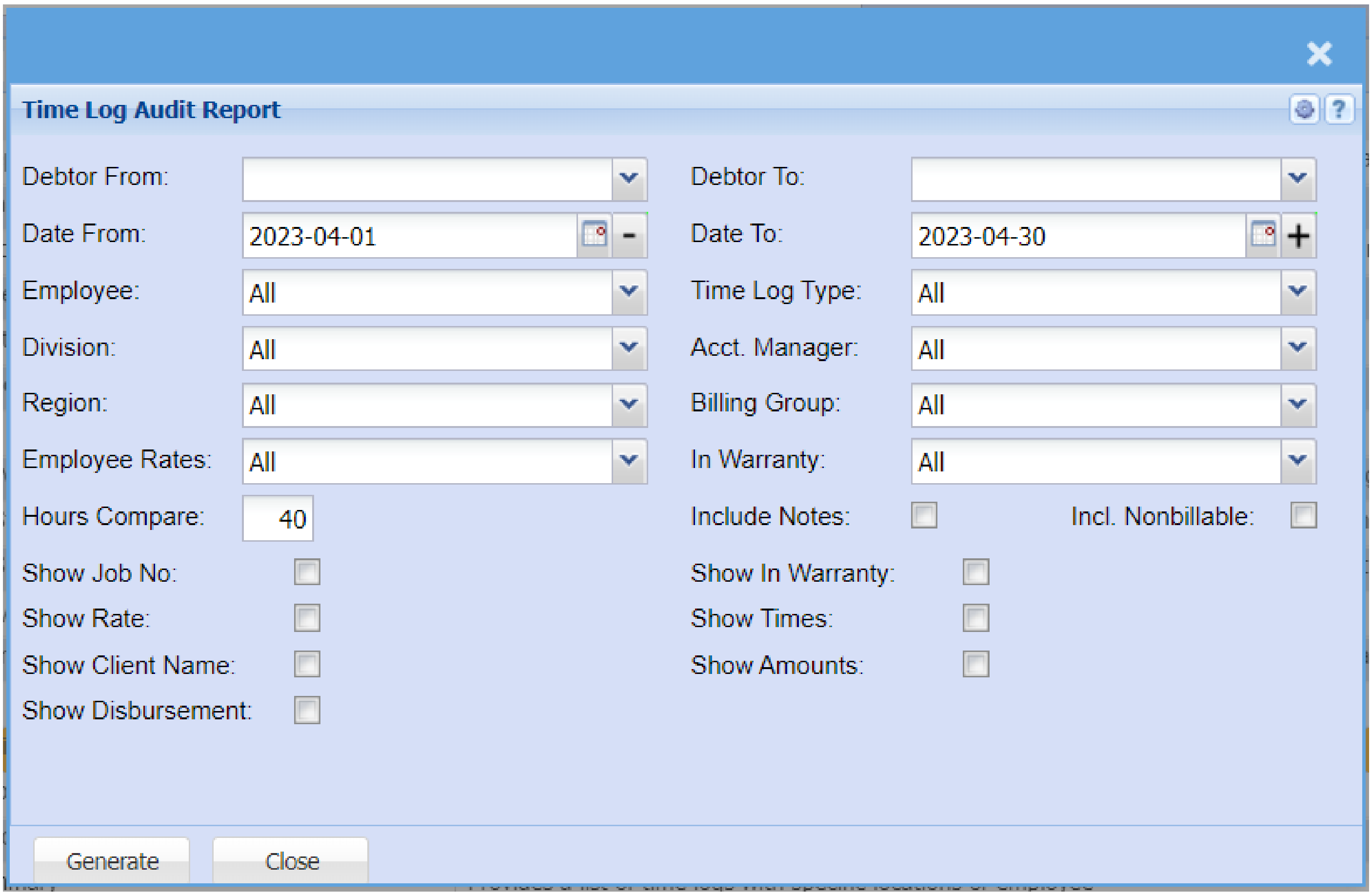
Group By	
Aging Type	
Year Selection	
Current Month	
Date Selection	
Employee	
Division	
Region	
Acct. Manager	
Billing Group	
Travel	

Toll Fees	
Disbursements	
Other	

Time Log Audit as Per Employee

CRM> Reports> Report List

This report provides a summary per employee of all time logs for the given date range. A summary of the individual Time logs is listed. Along with an accumulative summary of Normal Hours Labour, Overtime, Travel and disbursements



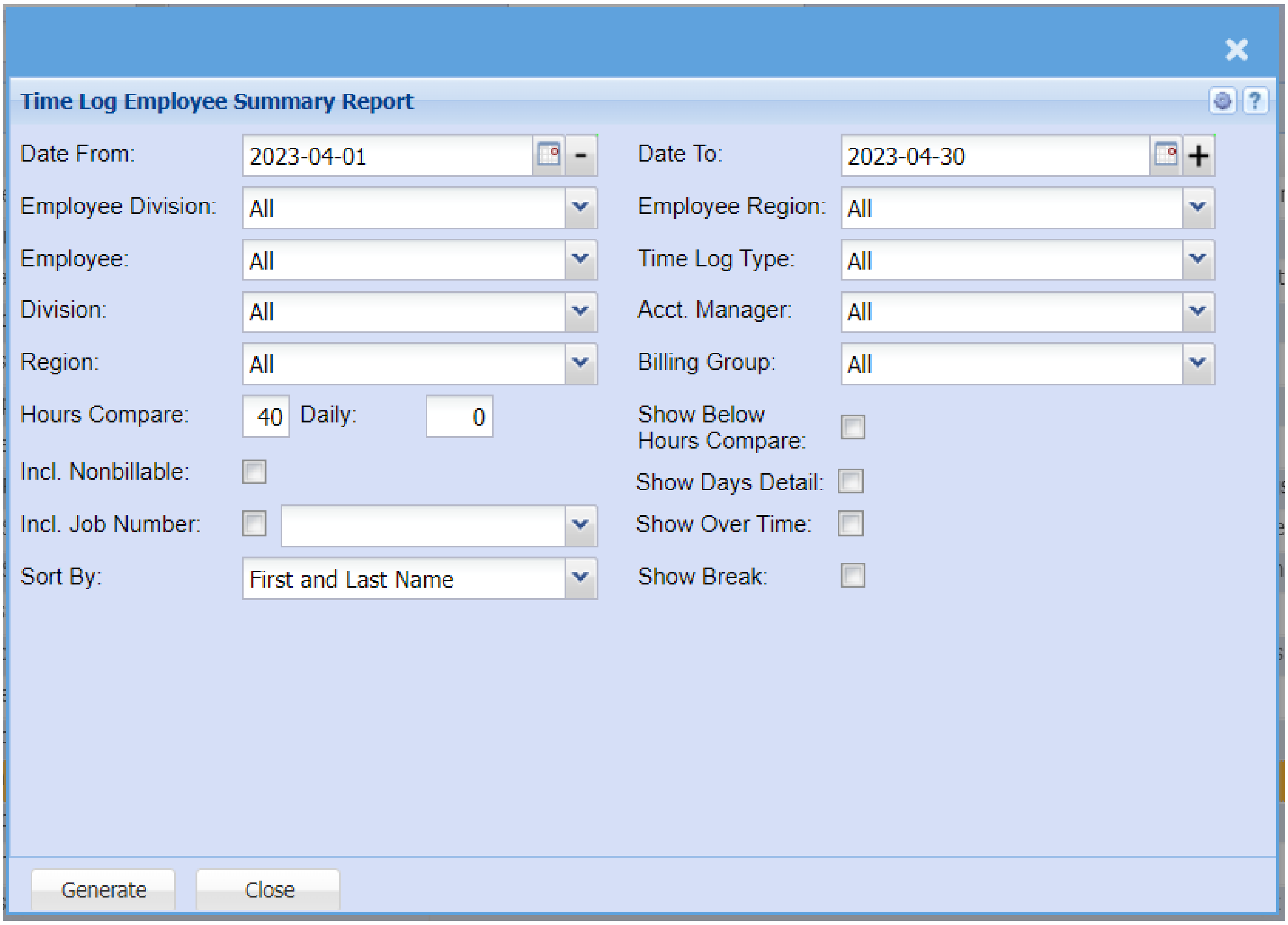
Debtor From	
Date From	
Employee	
Division	
Region	
Employee Rates	
Hours Compare	
Show Job No Tick	
Show Rate Tick	

Show Client Name Tick	
Show Disbursement Tick	
Debtor To	
Date To	
Time Log Type	
Acct. Manager	
Billing Group	
In Warranty	
Include Notes Tick	
Incl. Nonbillable Tick	
Show In Warranty Tick	
Show Times Tick	
Show Amounts Tick	

Time Log Employee Summary of Hours Logged

CRM> Reports> Report List

This report shows a summary of total hours logged versus Hours Billed, versus required hours. The hours compare field on the criteria is the total hours the employee is required to work.



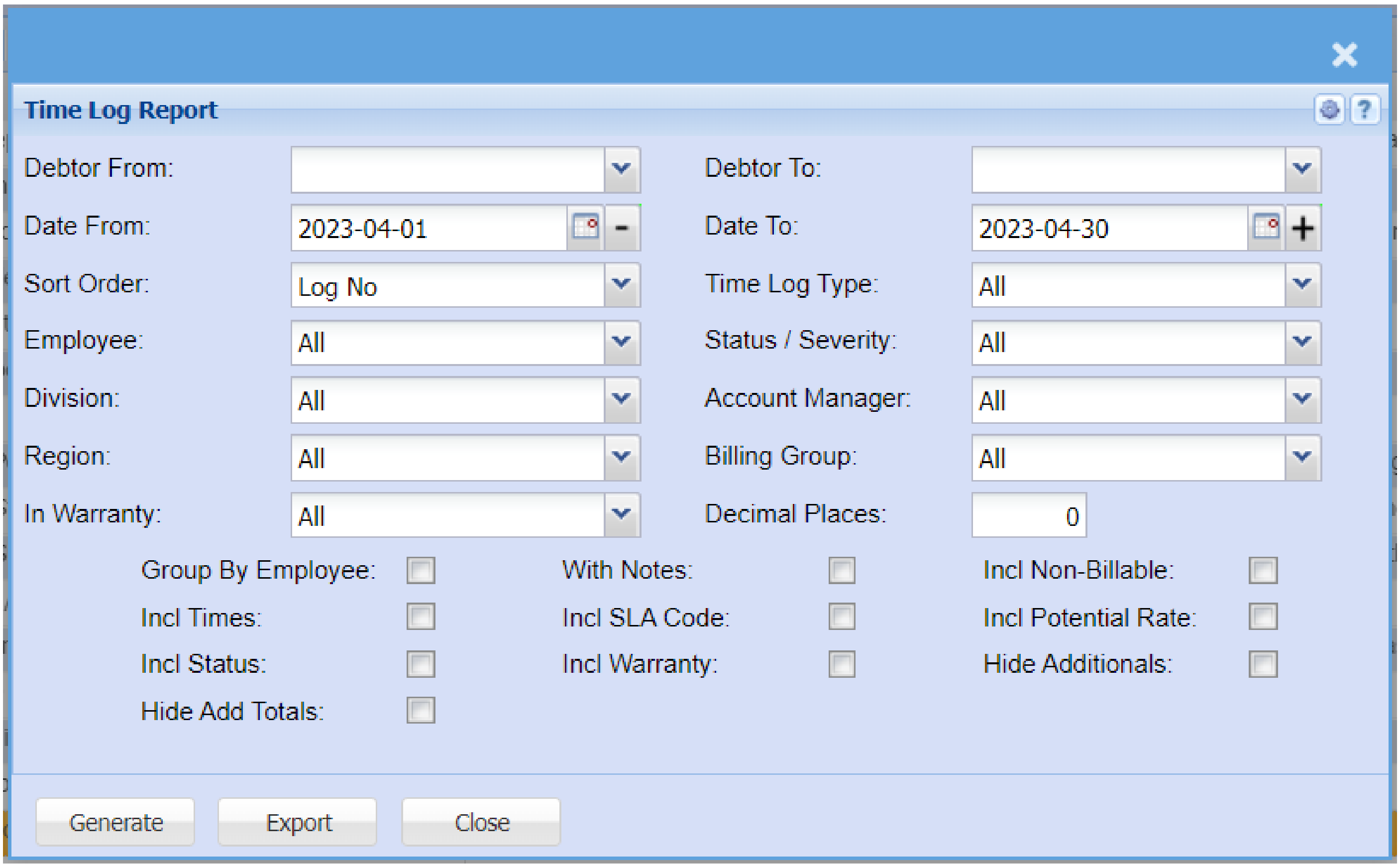
Date From	
Employee Division	
Employee	
Division	
Region	
Hours Compare	

Daily	
Incl. Nonbillable Tick	
Incl. Job Number Tick	
Sort By	
Date To	
Employee Region	
Time Log Type	
Acct. Manager	
Billing Group	
Show Below Hours Compare Tick	
Show Days Detail Tick	
Show Over Time Tick	
Show Break Tick	

Time Log Report

CRM> Reports> Report List

The report provides a list of Time Logs either by Debtor or by Employee wherein one can view in summary the detail of all time logs created within the Date range specified.
You have the option for the report to include any notes that were captured on the respective Time logs the report also extracts accumulative totals of hours and value of all time logs per employee or per debtor (depending on the sort order)



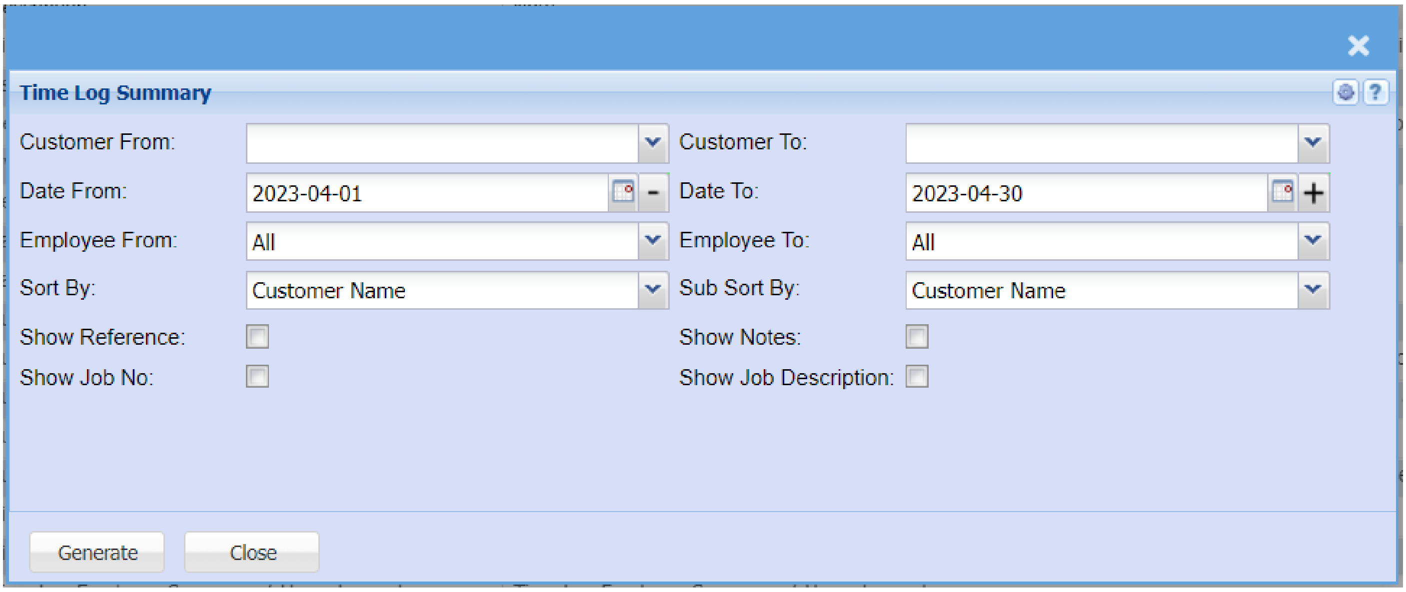
Debtor From	
Date From	
Sort Order	
Employee	
Division	
Region	
In Warranty	
Debtor To	
Date To	

Time Log Type	
Status / Severity	
Account Manager	
Billing Group	
Decimal Places	
Group By Employee Tick	
Incl. Times Tick	
Incl. Status Tick	
Hide Add Totals Tick	
With Notes Tick	
Incl. SLA Code Tick	
Incl. Warranty Tick	
Incl. Non-Billable Tick	
Incl. Potential Rate Tick	
Hide Additionals Tick	

Time Log Summary

CRM> Reports> Report List

Provides a list of time logs with specific locations of employee

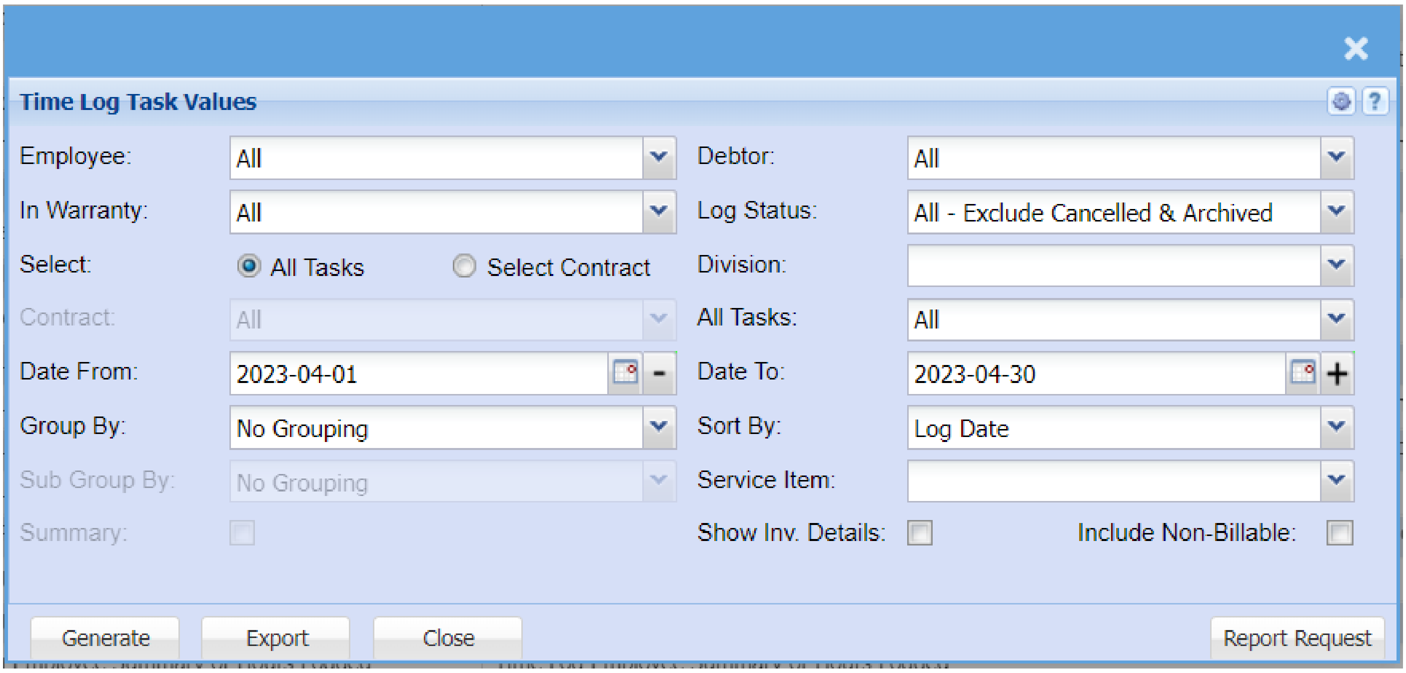


Customer From	
Date From	
Employee From	
Sort By	
Show Reference Tick	
Show Job No Tick	
Customer To	
Date To	
Employee To	
Sub Sort By	
Show Notes Tick	
Show Job Description Tick	

Time Log Task Values

CRM> Reports> Report List

Daily/Monthly/etc. Tasks Earnings - Daily/Monthly/etc. tasks that were billed, and amount billed for each of these tasks (so we can see what each task earned for the period)

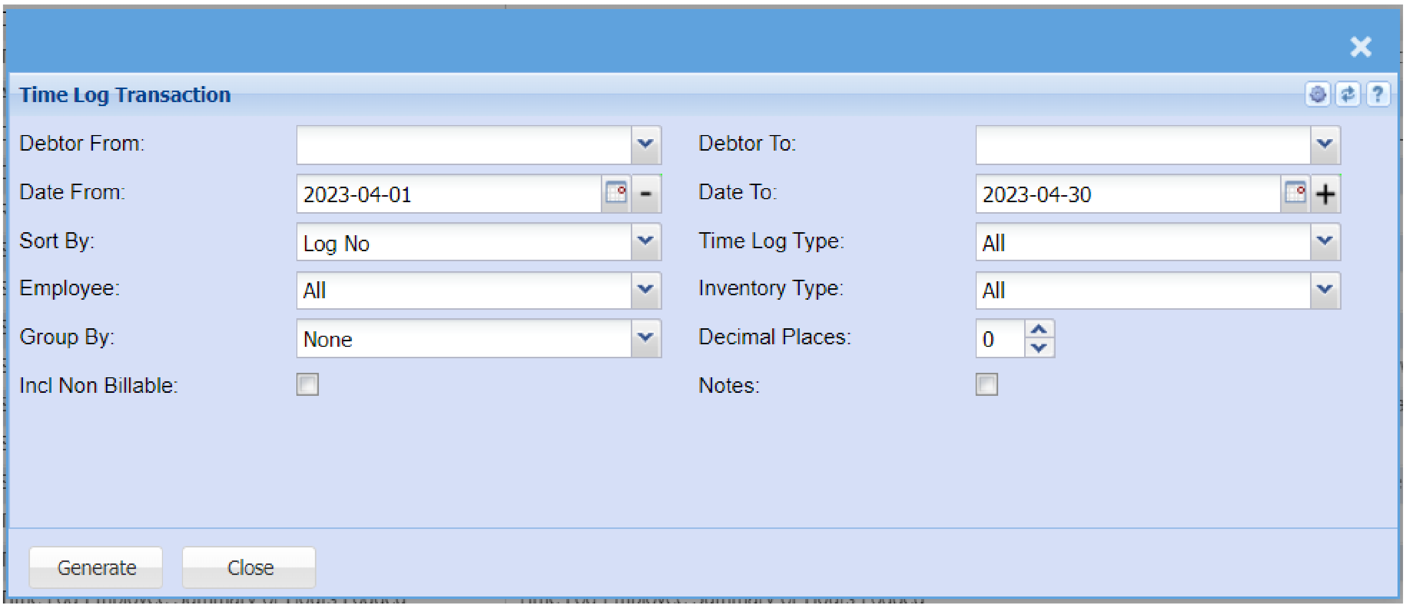


Employee	
In Warranty	
Select - All Tasks or Select Contract	
Contract	This will appear if you have selected Contract in the above selection.
Date From	
Group By	
Sub Group By	
Summary Tick	
Debtor	
Log Status	
Division	
All Tasks	This will appear if you have selected All Tasks in the Select section.
Date To	

Sort By	
Service Item	
Show Inv. Details Tick	
Include Non-Billable	

Time Log Transaction

CRM> Reports> Report List

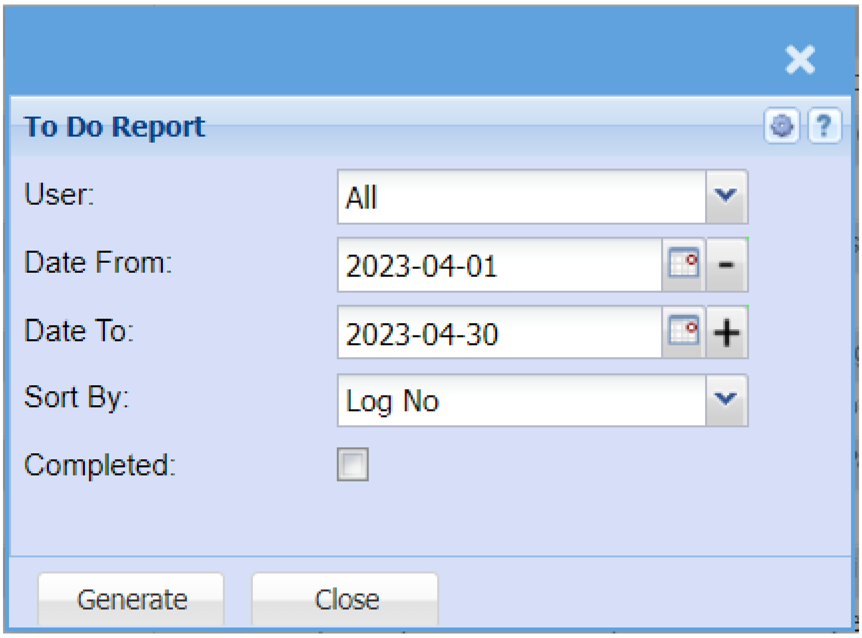


Debtor From	
Date From	
Sort By	
Employee	
Group By	
Incl. Non-Billable Tick	
Debtor To	
Date To	
Time Log Type	
Inventory Type	
Decimal Places	
Notes Tick	

To Do Report

CRM> Reports> Report List

Gives a report on the To Do lists logged by each User within the system.



This is the report on To Do lists logged by each user within the system.
The user will select the date from which he/she wants the report to run from and also Arrange it by log number, date or reference.
Completed option allows the user to either run the only the completed or uncompleted list