

CHEAT SHEET FOR THE DETAILED REPORTS

WHAT IS THE PURPOSE OF THIS GUIDE?

This guide (or cheat sheet) is only applicable to the Detailed Marketing Report and the Detailed Sales Report located within the Reporting Tab. This guide will show all the Report Columns available with these reports and how each calculates giving you specifics about the numbers. Report Columns are the calculated fields – they are the ones that show how many, how much, and what percentage. They are the reporting pieces that do the math.

In addition, this guide will break down two different ways each Report Column can calculate: Conversion Ratio and Total Numbers. The difference between the two types of calculations is explained below.

WHAT IS THE DIFFERENCE BETWEEN CONVERSION RATIO AND TOTAL NUMBERS?

CONVERSION RATIO: This reporting method was the way the reports calculated prior to this release (1.39 and before). So, if you're looking for the way the reports ran prior to this release, choose this option when running the report.

Conversion Ratio calculates based on how many times a lead converted. Meaning, did the inquiry convert to an appointment, did an appointment convert to a presentation, and did the appointment or presentation convert to a sale, etc. This reporting option looks at an overall conversion amount, rather than taking into consideration how many times you had to set an appointment to close the sale, it also looks at did this inquiry sell or did it not sell. Did it convert to the next "step" (ex: inquiry to appointment to confirmed to presentation to sold) or did it not?

Let's say for example Ms. Natasha Romanova met you at a home show. She scheduled an appointment, but then cancelled that appointment two days before it was scheduled to happen. She set another appointment at a later date in which a salesperson was able to complete a presentation, but she didn't buy. Another appointment was set for a week later, where the salesperson completed a second presentation and she purchased at that time.

Conversion Ratio numbers will tell us that there was one inquiry, and that one inquiry *converted* (this is the important term) to an appointment, so the appointment count is one. Even though there were two presentations, the inquiry *converted* to a presentation once so the presentation count would be one. And it *converted* to a sale once, so the job count would be one. Your report would look like this:

Inquiries	Confirmed	Appointments	Presentations	Gross Sales
1	1	1	1	1

The theory behind conversion ratio reporting is that an inquiry can only convert to an appointment, presentation, or sale once. This is particularly handy when looking at raw leads and what happened to them – you'll be asking the question, "what happened with my leads?" Conversion ratio tells us that of the leads you received, this is the percentage/count of them that converted to an appointment, and of those appointments, this is the percentage/count of those that converted into a presentation, etc.

TOTAL NUMBERS: This is a new reporting option. Some companies prefer to look at the total number of times an appointment was run and calculate the effectiveness of their business based on everything that has happened with an inquiry.

Total Numbers calculates ALL of the numbers available in the system. This means if three appointments were set, the count will be three in the report. This option can lead to percentages that are over 100%. For example: if you choose to show Inquiry to Appointment Set on your report and you have one inquiry, but three appointments, your percentage will be 300%.

Let's take the same example from above. Ms. Natasha Romanova met you at a home show. She scheduled an appointment, but then cancelled that appointment two days before it was scheduled to happen. She set another appointment at a later date in which

a salesperson was able to complete a presentation, but she didn't buy. Another appointment was set for a week later, where the salesperson completed a second presentation and she purchased at that time.

Total Numbers reporting tell us that there was one inquiry, you set three appointments from that inquiry, you had two presentations, and it sold once. Your report would look something like this:

Inquiries	Confirmed	Appointments	Presentations	Gross Sales
1	2	3	2	1

WHAT ARE ALL THESE DATE RANGE OPTIONS IN THE FILTER SETUP?

For each report you run, you'll need to select a date range, and not just the date range you want to show on the report, but the actual date *field* in the system that you want to use to see the information that falls within those specific dates.

Let's say you are running a report for your sales team on November 15th. You select the Appointment Date Range for October 1st to October 31st. This means that any appointments with an appointment date of October 1st to October 31st and any of the data (inquiries, jobs, etc) that are linked to that appointment are the only items that are going to show.



Here's an example: Mr. Steve Rogers had an appointment with one of your sales people on October 2nd, and that job sold three days later. This person **WOULD** show on the report because the **appointment** date falls within the date range you selected.

Let's say instead, that you had an appointment with Mr. Tony Stark on September 30th, and that job sold on October the 12th. This person would **NOT** show on the report because the **appointment** date does not fall within the date range you selected.

Different types of reports will warrant different date ranges (date fields). If you are running a sales-based report you may want to run your dates off the Appointment Date Range, the Appointment Set Date Range, or even Contract or Job Sale Date. If you are running a marketing-based report, you may want to run your dates off of the Inquiry Date Range.



WHY AREN'T ALL MY APPOINTMENTS SHOWING UP ON THE DETAILED REPORTS?

There are many of reasons why an appointment might not show in the detailed reports. However, one of the main reasons is that an appointment that does not have an appointment date will not count as an appointment.

Date/Time (CST)	Type	Salesperson	Result
	  Sales Presentation	Bruce Banner	Demo / Maybe

WHY AREN'T ALL MY JOBS SHOWING UP ON THE DETAILED REPORTS?

There are a lot of reasons why a job might not show in the detailed reports. However, one of the main reasons is that in order for a job to count as sold, the customer must have a valid inquiry with a corresponding appointment that has been resulted with a result that means 'Sold'.

Date/Time (CST)	Type	Salesperson	Result
7/1/2014 12:00:00 AM	  Sales Presentation	Bruce Banner	Demo / Sold

WHY ARE THE DATES SHOWING IN A NON-STANDARD FORMAT?

Many of our users export reports to Excel after they are generated in order to sort or modify them in some way. In order for the reports to sort by date correctly in Excel, the date format that we display, must be in the format of year, month, day.

Items Purchased Summary - All

2014-09-12 - Original Contract - Windows - Bruce Banner - \$8,500.00 - (\$500.00)
 2015-11-09 - Original Contract - Bath - Bruce Banner - \$25,000.00 - \$0.00
 2015-11-09 - Original Contract - Deck - Bruce Banner - \$7,000.00 - \$1,000.00

REPORT COLUMNS

The “Calculated Fields” – the fields that do the math for you.

REPORT COLUMN	DESCRIPTION	
Inquiries	CONVERSION RATIO:	Tallies the total number of inquiries that were created during the date range selected
	TOTAL NUMBERS:	Tallies the total number of inquiries that were created during the date range selected
% of Total Inquiries	CONVERSION RATIO:	The number of inquiries being grouped divided by the total number of inquiries being reported on
	TOTAL NUMBERS:	The number of inquiries being grouped divided by the total number of inquiries being reported on
Inquiry Price Quoted	CONVERSION RATIO:	Totals the price quoted dollars from the price quoted field in the inquiry
	TOTAL NUMBERS:	Totals the price quoted dollars from the price quoted field in the inquiry
Appt Set	CONVERSION RATIO:	Tallies the number of inquiries with at least one appointment
	TOTAL NUMBERS:	Tallies the total number of appointments
% of Total Appt Set	CONVERSION RATIO:	The number of inquiries with at least one appointment being grouped divided by the total number of appointments being reported on
	TOTAL NUMBERS:	The number of appointments being grouped divided by the total number of appointments being reported on
Confirmed	CONVERSION RATIO:	Tallies the number of inquiries with at least one confirmed appointment that have the “result” of the appointment confirmation marked as “complete”
	TOTAL NUMBERS:	Tallies the number of appointments that have the “result” of the appointment confirmation marked as “complete”
% of Total Confirmed	CONVERSION RATIO:	The number of confirmed inquiries being grouped divided by the total number of confirmed inquiries being reported on
	TOTAL NUMBERS:	The number of confirmed appointments being grouped divided by the total number of confirmed appointments being reported on
Issued	CONVERSION RATIO:	Tallies the number of issued inquiries (a lead counts as “issued” when the field “Date Issued” is filled out)
	TOTAL NUMBERS:	Tallies the number of issued appointments (a lead counts as “issued” when the field “Date Issued” is filled out)
% of Total Issued	CONVERSION RATIO:	The number of issued inquiries being grouped divided by the total number of issued inquiries being reported on
	TOTAL NUMBERS:	The number of issued appointments being grouped divided by the total number of issued appointments being reported on
Presentation	CONVERSION RATIO:	Tallies the number of inquiries with an appointment that resulted as a presentation
	TOTAL NUMBERS:	Tallies the number of appointments that resulted as a presentation

% of Total Presentation	CONVERSION RATIO:	The number of inquiries with an appointment that resulted in a presentation being grouped divided by the total number of presentations being reported on
	TOTAL NUMBERS:	The number of presentations being grouped divided by the total number of presentations being reported on
Sold First Call	CONVERSION RATIO:	Tallies the number of inquiries that have only one appointment where that one appointment was resulted as sold for the selected date range
	TOTAL NUMBERS:	Tallies the number of inquiries that have only one appointment where that one appointment was resulted as sold for the selected date range
% of Total Sold First Call	CONVERSION RATIO:	The number of sold first call jobs being grouped divided by the total number of sold first call jobs being reported on
	TOTAL NUMBERS:	The number of sold first call jobs being grouped divided by the total number of sold first call jobs being reported on
Total Sold	CONVERSION RATIO:	Tallies the number of inquiries with an appointment that was resulted as sold
	TOTAL NUMBERS:	Tallies the number of appointments that were resulted as sold
% of Total Sold	CONVERSION RATIO:	The number of sold jobs being grouped divided by the total number of sold jobs being reported on
	TOTAL NUMBERS:	The number of sold jobs being grouped divided by the total number of sold jobs being reported on
Inquiry to Appt Set	CONVERSION RATIO:	The number of inquiries with an appointment divided by the number of inquiries
	TOTAL NUMBERS:	The number of appointments divided by the number of inquiries
Appt Set to Confirmed	CONVERSION RATIO:	The number of inquiries with an appointment where the appointment has been confirmed, divided by the number of inquiries with an appointment
	TOTAL NUMBERS:	The number of appointments where the appointment has been confirmed, divided by the number of appointments
Inquiry to Lead Issued	CONVERSION RATIO:	The number of inquiries with an appointment with a valid date issued divided by the number of inquiries
	TOTAL NUMBERS:	The number of appointments with a valid date issued divided by the number of inquiries
Appt Set to Lead Issued	CONVERSION RATIO:	The number of inquiries with an appointment with a valid date issued divided by the number of inquiries with an appointment
	TOTAL NUMBERS:	The number of appointments with a valid date issued divided by the number of appointments
Lead Issued to Appt 1	CONVERSION RATIO:	The number of inquiries with an appointment with Appt 1 as the appointment type divided by the number of inquiries with an appointment with a valid date issued
	TOTAL NUMBERS:	The number of appointments with Appt 1 as the appointment type divided by the number of appointments with a valid date issued
Appt 1 to Appt 2	CONVERSION RATIO:	The number of inquiries with an appointment with Appt 2 as the appointment type divided by the number of inquiries with an appointment with Appt 1 as the appointment type
	TOTAL NUMBERS:	The number of appointments with Appt 2 as the appointment type divided by the number of appointments with Appt 1 as the appointment type
Appt 2 to Appt 3	CONVERSION RATIO:	The number of inquiries with an appointment with Appt 3 as the appointment type divided by the number of inquiries with an appointment with Appt 2 as the appointment type.
	TOTAL NUMBERS:	The number of appointments with Appt 2 as the appointment type divided by the number of appointments with Appt 3 as the appointment type
Inquiry to Presentation	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of presentation divided by the number of inquiries
	TOTAL NUMBERS:	The number of appointments with an appointment result of presentation divided by the number of inquiries
Appt Set to Presentation	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of presentation divided by the number of inquiries with an appointment
	TOTAL NUMBERS:	The number of appointments with an appointment result of presentation divided by the number of appointments

Lead Issued to Presentation	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of a presentation divided by the number of inquiries with an appointment with a valid date issued
	TOTAL NUMBERS:	The number of appointments with an appointment result of a presentation divided by the number of appointments with a valid date issued
Inquiry to Gross Sold	CONVERSION RATIO:	The number of inquiries with an appointment, where the appointment has a result of sold divided by the number of inquiries
	TOTAL NUMBERS:	The number of inquiries with an appointment, where the appointment has a result of sold divided by the number of inquiries
Appt Set to Gross Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold divided by the number of inquiries with an appointment
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold divided by the number of appointments
Issued to Gross Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold divided by the number of inquiries with an appointment with a valid date issued
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold divided by the number of appointments with a valid date issued
Presentation to Gross Sold First Call	CONVERSION RATIO:	The number of inquiries with a single appointment with an appointment result of sold divided by the number of inquiries with an appointment with an appointment result of presentation
	TOTAL NUMBERS:	The number of inquiries with only one appointment with a result of sold divided by the number of appointments with an appointment result of presentation
Presentation to Gross Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold divided by the number of inquiries with an appointment with an appointment result of presentation
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold divided by the number of appointments with an appointment result of presentation
Inquiry to Net Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold, on a job that has a contract status of approved divided by the number of inquiries
	TOTAL NUMBERS:	The number of inquiries with an appointment with an appointment result of sold, on a job that has a contract status of approved divided by the number of inquiries
Appt Set to Net Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold on a job that has a contract status of approved divided by the number of inquiries with an appointment
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold on a job that has a contract status of approved divided by the number of appointments
Issued to Net Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold on a job that has a contract status of approved divided by the number of inquiries with an appointment with a valid date issued
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold on a job that has a contract status of approved divided by the number of appointments with a valid date issued
Presentation to Net Sold First Call	CONVERSION RATIO:	The number of inquiries with a single appointment with an appointment result of sold on a job that has a contract status of approved divided by the number of inquiries with an appointment with an appointment result of presentation
	TOTAL NUMBERS:	The number of inquiries with a single appointment with an appointment result of sold on a job that has a contract status of approved divided by the number of appointments with an appointment result of presentation
Presentation to Net Sold	CONVERSION RATIO:	The number of inquiries with an appointment with an appointment result of sold on a job that has a contract status of approved divided by the number of inquiries with an appointment with an appointment result of presentation
	TOTAL NUMBERS:	The number of appointments with an appointment result of sold on a job that has a contract status of approved divided by the number of appointments with an appointment result of presentation

Gross Sales	CONVERSION RATIO:	Tallies the total number of jobs that exist in the selected date range
	TOTAL NUMBERS:	Tallies the total number of jobs that exist in the selected date range
Gross \$	CONVERSION RATIO:	Total job \$
	TOTAL NUMBERS:	Total job \$
% of Gross Sales	CONVERSION RATIO:	The number of jobs being grouped divided by the total number of jobs being reported on
	TOTAL NUMBERS:	The number of jobs being grouped divided by the total number of jobs being reported on
Average Gross Sale	CONVERSION RATIO:	Total job \$ divided by the number of jobs
	TOTAL NUMBERS:	Total job \$ divided by the number of jobs
Addendum	CONVERSION RATIO:	The total job \$ of the products listed as an Addendum on the job
	TOTAL NUMBERS:	The total job \$ of the products listed as an Addendum on the job
Cancelled	CONVERSION RATIO:	Tallies all jobs with a contracts status of 'Cancelled'
	TOTAL NUMBERS:	Tallies all jobs with a contracts status of 'Cancelled'
Cancelled \$	CONVERSION RATIO:	Total job \$ with a contract status of 'Cancelled'
	TOTAL NUMBERS:	Total job \$ with a contract status of 'Cancelled'
Gross Sales to Cancelled	CONVERSION RATIO:	The number of jobs with a contract status of 'Cancelled' divided by the number of jobs being reported on
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Cancelled' divided by the number of jobs being reported on
Finance Rejected	CONVERSION RATIO:	The number of jobs with a contract status of 'Finance Rejected'
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Finance Rejected'
Finance Rejected \$	CONVERSION RATIO:	Total job \$ with a contract status of 'Finance Rejected'
	TOTAL NUMBERS:	Total job \$ with a contract status of 'Finance Rejected'
Gross Sales to Finance Rejected	CONVERSION RATIO:	The number of jobs with a contract status of 'Finance Rejected' divided by the number of jobs being reported on
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Finance Rejected' divided by the number of jobs being reported on
Pending	CONVERSION RATIO:	The number of jobs with a contract status of 'Pending'
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Pending'
Pending \$	CONVERSION RATIO:	Total Job \$ with the contract status of 'Pending'
	TOTAL NUMBERS:	Total Job \$ with the contract status of 'Pending'
Gross Sales to Pending	CONVERSION RATIO:	The number of jobs with a contract status of 'Pending' divided by the number of jobs being reported on
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Pending' divided by the number of jobs being reported on
Net Sales	CONVERSION RATIO:	The number of jobs with a contract status of approved
	TOTAL NUMBERS:	The number of jobs with a contract status of approved
Net \$	CONVERSION RATIO:	The total job \$ with a contract status of 'Approved'
	TOTAL NUMBERS:	The total job \$ with a contract status of 'Approved'
Gross Sales to Net Sales	CONVERSION RATIO:	The number of jobs with a contract status of 'Approved' divided by the number of jobs being reported on
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Approved' divided by the number of jobs being reported on
Average Net Sale	CONVERSION RATIO:	Total job \$ with a contract status of 'Approved' divided by the number of jobs with a contract status of 'Approved'
	TOTAL NUMBERS:	Total job \$ with a contract status of 'Approved' divided by the number of jobs with a contract status of 'Approved'
Gross Sales per Inquiry	CONVERSION RATIO:	The number of jobs divided by the number of inquiries
	TOTAL NUMBERS:	The number of jobs divided by the number of inquiries
Net Sales per Inquiry	CONVERSION RATIO:	The number of jobs with a contract status of approved divided by the number of inquiries
	TOTAL NUMBERS:	The number of jobs with a contract status of approved divided by the number of inquiries

Gross Sales per Lead Issued	CONVERSION RATIO:	The number of jobs divided by the number of leads issued. (a lead counts as "issued" when the field "Date Issued" is filled out)
	TOTAL NUMBERS:	The number of jobs divided by the number of leads issued. (a lead counts as "issued" when the field "Date Issued" is filled out)
Net Sales per Lead Issued	CONVERSION RATIO:	The number of jobs with a contract status of 'Approved' divided by the number of leads issued
	TOTAL NUMBERS:	The number of jobs with a contract status of 'Approved' divided by the number of leads issued
Gross Sales per Presentation	CONVERSION RATIO:	Total job \$ divide by the number of inquiries with an appointment result that counts as a presentation
	TOTAL NUMBERS:	Total job \$ divide by the number of inquiries with an appointment result that counts as a presentation
Net Sales per Presentation	CONVERSION RATIO:	Total job \$ with a contract status of approved divided by the number of inquiries with an appointment result that counts as a presentation
	TOTAL NUMBERS:	Total job \$ with a contract status of approved divided by the number of inquiries with an appointment result that counts as a presentation
Contract Balance Due	CONVERSION RATIO:	Total balance due \$
	TOTAL NUMBERS:	Total balance due \$

DETAIL FIELDS

Detail fields tell you what about the people you're reporting on or what specifics about the data you'll see – so whereas the report columns will tell you that you have five appointments, the detail fields will give you information about those five appointments, like the day of the appointment, the salesperson, etc.

DETAIL FIELD	DESCRIPTION
Full Name	Displays the first name and the last name as shown on the contact record (the mailing address)
First Name	Displays the first name as shown on the contact record (the mailing address)
Last Name	Displays the last name as shown on the contact record (the mailing address)
Company	Displays the company name as shown on the contact record (the mailing address)
Address	Displays the address as shown on the contact record (the mailing address)
City	Displays the city as shown on the contact record (the mailing address)
State	Displays the state as shown on the contact record (the mailing address)
Zip	Displays the zip code as shown on the contact record (the mailing address)
County	Displays the county as shown on the contact record (the mailing address)
Phone Number	Displays the phone number marked as primary shown on the contact record
Email Address	Displays the email address as shown on the contact record
Primary Lead Source	Displays the primary lead source for the particular inquiry or inquiries being reported on
Secondary Lead Source	Displays the secondary lead source for the particular inquiry or inquiries being reported on
Promoter	Displays the promoter for the particular inquiry or inquiries being reported on
Canvasser	Displays the canvasser for the particular inquiry or inquiries being reported on
Telemarketer	Displays the telemarketer for the particular inquiry or inquiries being reported on
Inquiry Taken By	Displays the inquiry taken by for the particular inquiry or inquiries being reported on
Inquiry Date/Time	Displays the inquiry date and time for the particular inquiry or inquiries being reported on
Inquiry Status	Displays the inquiry status by for the particular inquiry or inquiries being reported on
Inquiry Division	Displays the inquiry division by for the particular inquiry or inquiries being reported on
Inquiry Price Quoted	Displays the total amount of the price quoted values for the particular inquiry or inquiries being reported on
Salesperson 1	Displays the salesperson 1 for the particular appointment or appointments being reported on
Salesperson 2	Displays the salesperson 2 for the particular appointment or appointments being reported on

Appointment Set By	Displays the appointment set by for the particular appointment or appointments being reported on
Appointment Set Date	Displays the appointment set date for the particular appointment or appointments being reported on
Appointment Date/Time	Displays the appointment date and time for the particular appointment or appointments being reported on
Appointment Type	Displays the appointment type for the particular appointment or appointments being reported on
Appointment Result	Displays the appointment result for the particular appointment or appointments being reported on
Appointment Result Reason	Displays the appointment result reason for the particular appointment or appointments being reported on
Contract Date	Displays the contract date for the particular job or jobs being reported on
Contract Status	Displays the contract status for the particular job or jobs being reported on
Contract Total	Displays the total contract amount for the particular job or jobs being reported on (the total of all the products listed on a job)
Contract Balance Due	Displays the balance due of the contract for the particular job or jobs being reported on (the total of all the products listed on a job minus all payments listed in the financial area)
Job Name	Displays the job name for the particular job or jobs being reported on
Job Number	Displays the job number for the particular job or jobs being reported on
Job Sale Date	Displays the job sale date for the particular job or jobs being reported on
Job Completion Date	Displays the job completion date for the particular job or jobs being reported on
Job Status	Displays the job status for the particular job or jobs being reported on
Job Type	Displays the job type for the particular job or jobs being reported on
Product Interest Summary	Displays the product interest summary (the products listed in the inquiry area) in this format: Product – Description Product – Description
Product Interest Summary w/\$	Displays the product interest summary (the products and price quoted listed in the inquiry area) in this format: Product – Description – \$xxx Product – Description – \$xxx
Items Purchased Summary	Displays the items purchased summary (the products listed in the jobs area) in this format: Product Product
Items Purchased Summary w/\$	Displays the items purchased summary (the products listed in the jobs area) in this format: Product – \$xxx Product – \$xxx
Items Purchased Summary - All	Displays the items purchased summary (the products listed in the jobs area) in this format: Product Sale Date – Original Contract/Addendum – Product – Salesperson – \$Product Price – \$Product Adjustment