

Auto Reporting

Select Report to Schedule

Select Report:

Run: Daily Weekly on First of Month

Run at: :

Run for: Current Month Previous Month Last days

Send to: Myself Each Salesperson
 Salespeople will only see their results
 Salespeople will see everyone's results

Sales Person: *

- Karalee Kemp
- Sam Bishop
- Mark Brown
- Ryan California
- Dan Cerdena
- Joe Cerdena
- Sue Cox
- Scott Diehl
- CL Forest Products
- Shawn Gabbins
- Peter Gibbons
- Kerri Jamison
- Chris Kemp
- Tresa Kent
- Clear Lake Lumber
- Jesse LaSon
- John Lowther

Why Use Auto Reporting?

1. Every Thursday at 2:00 your sales team receives a list of contacts that are overdue to be called. This gives them time to catch up on missed calls before the end of the week.
2. Every Monday at 7:00, Sales Manager's receive Activity reports for each of their sales reps for the past week.
3. On the 1st of the month, the President, the VP of Sales, all Sales Managers, and your sales team, receives the Salesperson Performance Report for the previous month. This details each salesperson's sales, unique contacts called on, calls and visits made, along with other statistics.

Key Features:

1. Saves you and your sales team time by emailing reports to you whenever you want them, automatically.
2. Managers can create an auto report that will be sent to sales team members.