

ANGLER CONNECT

User Manual Document

Version 1.0

Developed By



Full Service Provider of e-Business

ANGLER Technologies India Pvt. Ltd.

“Jupiter House”, 8/1144 Trichy Road, Coimbatore – 641045, India

Phone: 0091-422-2312707 / 2313938 Fax: 0091-422-2313936

www.angleritech.com info@angleritech.com

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Submission To		
Company Name	Person name	Mail id
Angler Technologies India Pvt Ltd	Mr. Jayanthra, CEO	jayanthra@anglertech.com
Angler Technologies India Pvt Ltd	Mr. Giridhar, CTO	giridhar@anglertech.com

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1. Welcome to ANGLER CONNECT

Thank you for using ANGLER CONNECT, created by Angler Technologies India Pvt Ltd. ANGLER CONNECT, an easy-to-use Customer Relationship Management service designed for the web. Customer Relationship Management (CRM) is the overall process of Marketing, Sales and Service & Support within any Organization.

1.1. About this manual

This ANGLER CONNECT User manual is designed for users who are new to the ANGLER CONNECT application, the areas of customer relationship management and web-based applications generally. Users are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer, and Internet browser software such as Microsoft Internet Explorer.

This ANGLER CONNECT User manual provides information for two groups of application users – Users (ANGLER Business Development Executives + Administrators) who wish to record and track company activities and outcomes. ANGLER administrator who manage user access to the application.

2. About ANGLER CONNECT

ANGLER CONNECT application enables ANGLER to efficiently organize and maintain information on all aspects of the customer relationship. The application seamlessly blends all of the functionality required to manage information on many ANGLER related business aspects into an intuitive and friendly tabbed user interface.

The core features of ANGLER CONNECT application are:

1. Accounts and Contacts Management

- a. Customers creation and management with any number of Contacts associated with each Customer

2. Opportunities Management

- a. The opportunities details for ANGLER will be maintained in this module.

3. Activities Management

- a. User can maintain the customer visit details and the issue details during the customer visit.

4. Leads Management

- a. A lead is a prospect or potential opportunity - a person you met at a conference who expressed interest or someone who filled out a form the company's web

site. You can enter leads manually in the Leads section, or the administrator can import leads or set up Online Lead Capture to gather information from the company's web site.

3. Getting Started with ANGLER CONNECT

This user manual assumes that the resources you need to access the application are available and that you are familiar with how to use them. If you are not sure how to use a web browser (mainly IE), please talk to the ANGLER CONNECT administrator.

3.1. Technical Requirements

Before using ANGLER CONNECT, ensure that you have the appropriate software installed and configured on your system. All you will need is

1. A web browser, Internet Explorer 6.0 recommended.
2. JavaScript and cookies support enabled in your web browser (If you encounter problems accessing the application, check your browser configuration to ensure both JavaScript support and cookies support are enabled. (See *Tools > Internet Options > Privacy and Security* tabs in Internet Explorer)
3. The application dynamically creates the screens displayed by the web browser when you click certain buttons. Using '**Back**' and '**Forward**' buttons can cause problems displaying these dynamically generated pages. For this reason, we do not recommend using these controls on your browser when operating the application.
4. The application is designed for a minimum 1024x768-pixel screen display resolution.

3.2. Log in Information

ANGLER CONNECT application administrator assigns log in information – a user name and password – to every user. If you have not received your user name and password combination, please contact your application administrator.

If you do not provide the correct user name and password, ANGLER CONNECT application will not allow you to access the application.

4. Accessing ANGLER CONNECT

To access ANGLER CONNECT application, type the URL www.anglerconnect.com into your web browser's address bar, so that you can get into the ANGLER CONNECT. You should see a screen similar to the one shown in Figure 1.

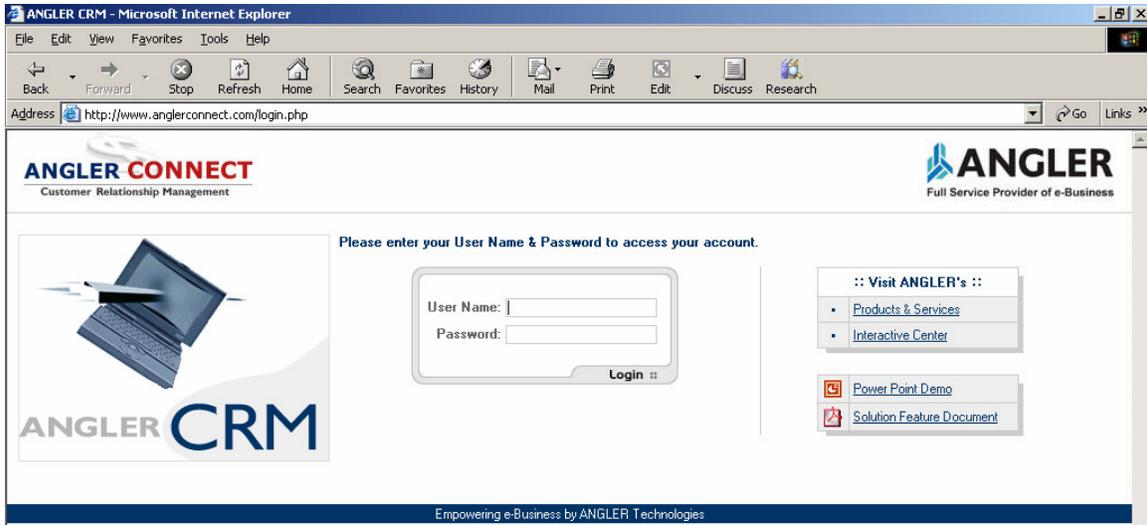


Figure 1: ANGLER CONNECT application log in screen

This is the ANGLER CONNECT application log in screen. If you do not see a log in screen, verify that you have entered the URL correctly. If you did not make a typing mistake, contact your ANGLER CONNECT administrator to verify that you have the correct URL. To proceed, you must log in to the application by providing a valid user name and password.

4.1. To log in to ANGLER CONNECT

In the ANGLER CONNECT application log in screen, please provide the below information.

1. Type your username in the User Name box.
2. Type your password in the Password box.
3. Click the Login button.

4.2. If you cannot log in

1. Verify that your user name and password were entered correctly, including any capital letters. User name and password are case sensitive.
2. Contact your system administrator to verify that you have the correct username and password combination.
3. Your account may have been disabled. Contact your system administrator.

4.3. Security Timeout

For security reasons, the application will automatically log you out of the application if you do not perform any tasks for a period of time. By default, the application will not log you out until 30 minutes have elapsed without any activity.

When you are ready to resume working with the application, click any button on the screen. The application will automatically load the log in page for you. You can also close all web browser windows and reload the log in page manually.

4.4. Managing Your Password

When you have given the privilege to access the application, your ANGLER CONNECT administrator will provide you the user name with a password. For security reason, you may change this password to another one as only you know. Ensure that you choose a password that is easy for you to remember, but difficult for another person to guess. You can change your password at any time. It will be better by changing your password occasionally.

4.5. To change your password

Figure 2 shows Change password screen. You can move to this screen by clicking the Setup tab. Refer Figure 3.

1. Click the Change Password link
2. In the Change Password screen, your username will be displaying. Type your current password in the Old Password field, and type your new password in the New Password box and again type the new password once again in Confirm Password box to confirm your new password.
3. Click the Save button.
4. Your password will be changed.

Setup Change Password	
User Name :	admin@angleritech.com
Old password :	<input type="text"/>
New password:	<input type="text"/>
Verify New password:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Figure 2: Change Password screen

5. The User Interface

The first thing you will see after logging into the application is the Home tab, as shown below in Figure 3.

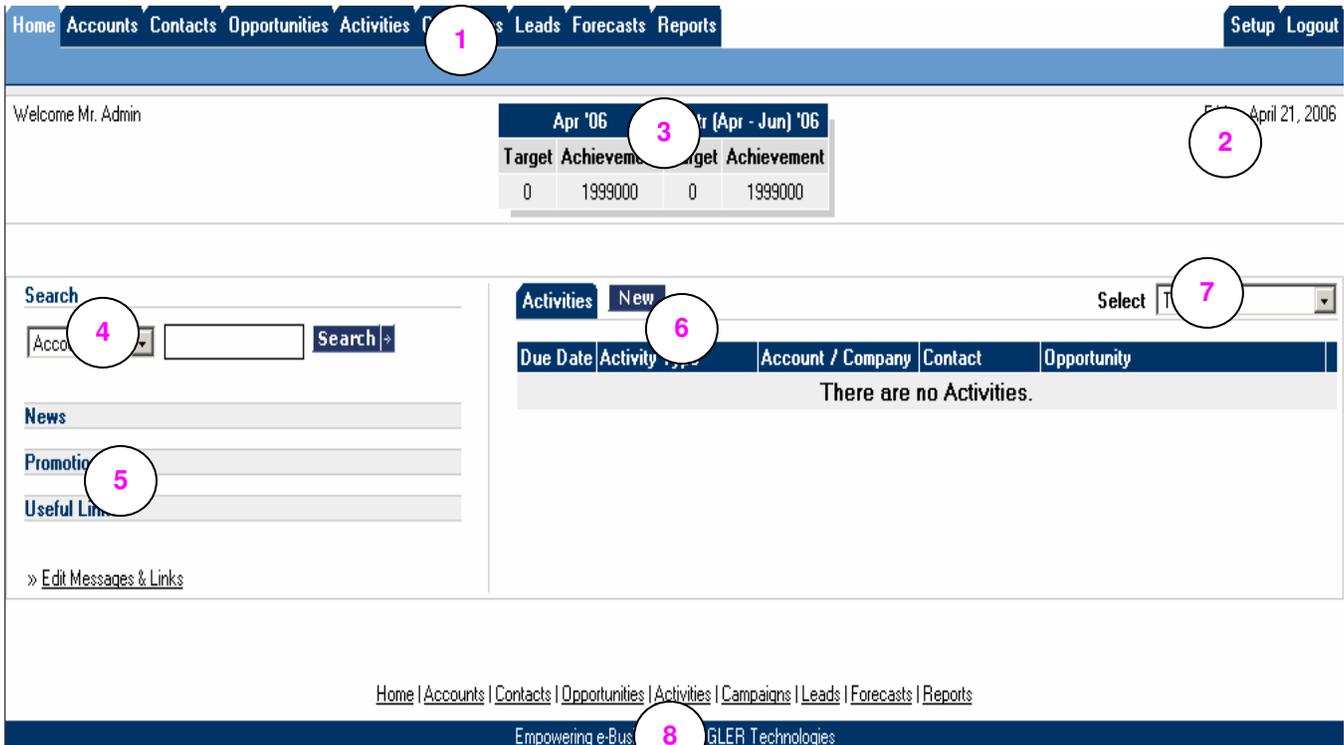


Figure 3: The Home Tab screen

The various key elements of the screen layout are highlighted on Figure 3, as follows:

1. **Navigation Tabs:** Click to choose the desired module
2. **Date:** The current login date will be displayed
3. **Target vs. Achievement:** The Target and Actual Achievement of the logged in user for the current month and the current financial quarter will be displayed.
4. **Search Component:** Search the required records by using this Search component. This component is available in all the screens. In each page, the search component will be available in the right side top of the page.
5. **News, Promotions and useful Links:** The latest news, Promotions and Useful links will be available in the Home page itself.
6. **Activities:** The current day visit details for the logged in users (for Customer Owners) will be displayed. Using the Insert button, the user can create new customer visit
7. **Select:** Using this select option, user can know the Overdue, Today+Overdue, Next 7 Days + Overdue, This Month visit reports can be viewed.
8. **Footer:** Similar to the navigation tabs.

6. Modules and Sub-modules

From the Home tab, you can access any module with which you want to work, by clicking on the tab which bears its name. Modules help you work more efficiently by grouping the tools and functions you need to perform specific tasks. Each module has one or more sub-modules available in it.

Note:

- Modules tabs are not privilege based. That is, all the modules (tabs) will be displayed to all the user levels.
- Sub-modules are privilege based. That is, based on the assigned user level privileges by the ANGLER administrator, the sub-modules will be displayed to the logged in users.

The list of modules and sub-modules are as follows:

1. Home
2. Accounts
 - New Account
 - My Accounts
3. Contacts
 - New Contact
 - My Contacts
4. Opportunities
 - New Opportunity
 - My Opportunities
5. Activities
 - New Activity
 - My Activities
 - My Activity Log
6. Leads
 - New Lead
 - My Leads
7. Forecasts
 - View Target & Achievement
8. Reports
 - Account and Contact Reports
 - Opportunity Reports
 - Activity Reports
 - Lead Reports
9. Setup
 - Change Password

10. Logout

7. Home

The Home module is explained in detail in the section 5 (please refer above).

8. Accounts

Accounts related information will be maintained in this module. This module has 2 sub-modules.

They are: New Account and My Accounts. Figure 4 shows the default page of Accounts module.

Search

Account Name	City	Industry	Phone	Email
Test10	test city8	Professional Services	913333356456	test10@angleritech.com
Test100	test city23	Professional Services	913333356456	test100@angleritech.com
Test1000	test city23	Professional Services	913333356456	test1000@angleritech.com
Test1001	test city24	Software	913333356456	test1001@angleritech.com
Test1002	test city25	Financial	913333356456	test1002@angleritech.com
Test1003	test city1	Professional Services	913333356456	test1003@angleritech.com
Test1004	test city2	Software	913333356456	test1004@angleritech.com
Test1005	test city3	Financial	913333356456	test1005@angleritech.com
Test1006	test city4	Professional Services	913333356456	test1006@angleritech.com
Test1007	test city5	Software	913333356456	test1007@angleritech.com
Test1008	test city6	Financial	913333356456	test1008@angleritech.com
Test1009	test city7	Professional Services	913333356456	test1009@angleritech.com
Test101	test city24	Software	913333356456	test101@angleritech.com
Test1010	test city8	Software	913333356456	test1010@angleritech.com
Test1011	test city9	Financial	913333356456	test1011@angleritech.com
Test1012	test city10	Professional Services	913333356456	test1012@angleritech.com
Test1013	test city11	Software	913333356456	test1013@angleritech.com
Test1014	test city12	Financial	913333356456	test1014@angleritech.com
Test1015	test city13	Professional Services	913333356456	test1015@angleritech.com
Test1016	test city14	Software	913333356456	test1016@angleritech.com

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25
 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

Figure 4: Accounts module default screen – My Accounts page

Note: If the logged in user has the privilege to create new accounts details then the sub-modules Create New Accounts Detail links will be available. Otherwise, it won't display. This will be controlled by the ANGLER CONNECT administrator. This privilege will be applicable to all the modules.

8.1 New Accounts

This sub-module is privilege based. Through this sub-module, users can create New Accounts details like Name of the Account, Account Held By, Account Owner, Account Alias Name, Account Site, Industry, Annual Turnover and also the contact detail of the Account Owner. Figure 5 shows the Create Customer Profile screen.

To create a New Account, click the link New Account. By default in the Created By field, the logged in user will be displayed. Then please enter the detail for the fields, Account Held by,

Account Owner, Account Alias Name, Account Site and select Industry here we can also select more than two types, and then give tab to enter Annual Turnover, Phone, Fax, E-Mail, Website, Employee, then select Ownership and Category from drop down list box and in Address Information enter the fields like Street, City, State, Zip / Postal Code and select Country from drop down box and also enter the Description and Products & Services. After entering all those fields please check the option box based on the Account, if the account is Client then select the field Whether Client, if the account is not client then select it as Private.

Accounts
Add Account

Account Information:

Created By: Admin	Phone: <input type="text"/>
Account Held by: <input type="text" value="Select Location"/>	Fax: <input type="text"/>
Account Owner: <input type="text" value="Admin"/>	Email: <input type="text"/>
Account Name: <input type="text"/>	Website: <input type="text"/>
Account Alias Name: <small>(Account Name to be display in Reports)</small>	Ownership: <input type="text" value="Select"/>
Account Site: <input type="text"/>	Employees: <input type="text"/>
Industry: <input type="text" value="Financial Professional Services Software"/>	Category: <input type="text" value="Select"/>
Annual Turnover: <input type="text"/>	

Address Information:

Street: <input type="text"/>	
City: <input type="text"/>	
State: <input type="text"/>	
Zip / Postal Code: <input type="text"/>	
Country: <input type="text" value="India"/>	

Description: <input type="text"/>	
Products & Services: <input type="text"/>	
Whether Client?: <input type="checkbox"/>	
Private: <input type="checkbox"/>	

Save
Save & New
Reset
Back

Figure 5: New Account screen

After entering all the values in all fields then give Save to get Save or if you need to create another Customer Profile then give Save & New or click the Reset button to clear the values in all the field and reset to its original state or if we want to move to the previous page then by giving Back we can move to previous page.

8.2 My Accounts

In this module, logged-in user can view accounts details allocated to them. View a paginated Account list. A maximum of 20 records (Accounts Links) will be displayed per page. Refer Figure 4. Dropdowns are available for the fields like Account Name, City and Industry, here You can list the records based on the dropdown selection. By clicking on a specific account link you can view the account in detailed manner as like in the below figure. This view is called as detailed view. Figure 5 shows the screen of it. From a specific account record, you may link to related contacts. Also you can create new contacts and can add notes for the customer.

Accounts
Test100

Account Information:

Created By: Admin	Phone: 9133333356456
Account Held With: Los Angeles	Fax: 9333333876987
Account Owner: Admin	Email: test100@angleritech.com
Account Name: Test100	Website: www.test100.com
Account Alias Name: (For display in Reports) aname100	Ownership: Private
Account Site: test site	Employees: 8988
Industry: Professional Services	Category:
Annual Turnover: 912223333787	

Address Information:

Address:	test street, test city23, test state23, 625 002, USA
----------	-----------------------------------------------------------------------------

Description:	This account is created by testing dept
Products & Services:	
Whether Client?:	X
Private:	X

Edit
Delete
Back

Figure 5: Customer record – Detailed view screen

Also there is provision to edit and delete account in the same page. If the account record is related with any contacts, it can't be able to delete. The sharing violation error message shown in Figure 6 will appear.

[Home](#)
[Accounts](#)
[Contacts](#)
[Opportunities](#)
[Activities](#)
[Campaigns](#)
[Leads](#)
[Forecasts](#)
[Reports](#)

[New Account](#) | [My Accounts](#) | [All Accounts](#)

The Record was not deleted due to the following reason(s)

This Account may be associated with the following Module(s).

- **Contacts**
- **Opportunities**
- **Activities**

Please delete the relevent records in the above module(s) associated with this Account and then delete this Account.

[Back](#)

Figure 6: Sharing violation error message

9. Contacts

Accounts wise contact person information can be maintained in this module. This module has 2 sub-modules. They are: New Contact and My Contacts. The below figure shows the default page of contacts module.

Contacts		My Contacts		Search	
		Accounts	<input type="text"/>	Search	
Contact Name	Account Name	Phone	Mobile	Email	
Mr. Test Contact10	Test10	913333356456	989898765544	test10@angleritech.com	
Mr. Test Contact100	Test100	913333356456	989898765544	test100@angleritech.com	
Mr. Test Contact1000	Test1000	913333356456	989898765544	test1000@angleritech.com	
Mr. Test Contact1001	Test1001	913333356456	989898765544	test1001@angleritech.com	
Mr. Test Contact1002	Test1002	913333356456	989898765544	test1002@angleritech.com	
Mr. Test Contact1003	Test1003	913333356456	989898765544	test1003@angleritech.com	
Mr. Test Contact1004	Test1004	913333356456	989898765544	test1004@angleritech.com	
Mr. Test Contact1005	Test1005	913333356456	989898765544	test1005@angleritech.com	
Mr. Test Contact1006	Test1006	913333356456	989898765544	test1006@angleritech.com	
Mr. Test Contact1007	Test1007	913333356456	989898765544	test1007@angleritech.com	
Mr. Test Contact1008	Test1008	913333356456	989898765544	test1008@angleritech.com	
Mr. Test Contact1009	Test1009	913333356456	989898765544	test1009@angleritech.com	
Mr. Test Contact101	Test101	913333356456	989898765544	test101@angleritech.com	
Mr. Test Contact1010	Test1010	913333356456	989898765544	test1010@angleritech.com	
Mr. Test Contact1011	Test1011	913333356456	989898765544	test1011@angleritech.com	
Mr. Test Contact1012	Test1012	913333356456	989898765544	test1012@angleritech.com	
Mr. Test Contact1013	Test1013	913333356456	989898765544	test1013@angleritech.com	
Mr. Test Contact1014	Test1014	913333356456	989898765544	test1014@angleritech.com	
Mr. Test Contact1015	Test1015	913333356456	989898765544	test1015@angleritech.com	
Mr. Test Contact1016	Test1016	913333356456	989898765544	test1016@angleritech.com	

Page **1** 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25
 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

Figure 9: Contact screen – default page

9.1 New Contact

This sub-module is privilege based. Through this sub-module, users can create contact person details like contact person name, their job title, phone number, email-id and other important details. The screenshot for Add Contact page is mentioned in Figure 10.

Figure 10: Create Contact Profile screen

9.2 My Contacts

Through this page we can view the Contacts associated with the logged in users. The display of contact records privilege is similar to the My Accounts page. You can click on a specific contact record to zoom in on the Contact – Detail view. Figure 11 shows the screen of it.

Contacts **Mr. Test Contact1000**

Contact Information:

Created By:	Admin	Phone:	913333356456
Contact Owner:	Admin	Home Phone:	
Name:	Mr. Test Contact1000	Mobile:	989898765544
Contact Category:	Influencer	Other Phone:	
Is a Decision Maker?:	X	Fax:	933333876987
Account:	Test1000	Email:	test1000@angleritech.com
Job Title:	Test Job1000	Assistant:	
Birthdate:		Asst. Phone:	

Address Information:

Address:	test street1000, test city1000, test state1000, 625 002, USA.
----------	---------------------------------------------------------------------------

Description: This contact is created by testing dept

Send Periodic Mailers:	Electronic: X Non-electronic: X
Private:	X

[Edit](#) [Delete](#) [Back](#)

Figure 11: My Contacts – Detail view screen

In this module we also have the Provision to Add notes.

10. Opportunities

The opportunities details for ANGLER CONNECT can be maintained in this module.

10.1 New Opportunity

If the Admin has given the privilege to the User then he can Add Opportunity using the New Opportunity. Through this link we can create an Opportunity so that in future if we want to know about a project status then we can get a complete detail of a project through retrieving this page. The mandatory fields in this page are Opportunity Owner, Opportunity Number, Opportunity Group, Opportunity Type, Account Name, Contacts, Lead Source, Opportunity Value, Currency, Expected Close Date, Sales Stage, Probability, and Status.

To create the Opportunity click the link New Opportunity then the link gets open now select the Opportunity Owner in the drop down box and give Tab to enter Opportunity Name and give tab to select Opportunity Category, Opportunity Group, Opportunity Type and Account Name from the drop down list and based on the Account Name the Contacts will be display and select even more than one in this list box. Then move next field Description and enter the description of the opportunity, then give tab to select Include for Forecast, this field is specifically if you are going to select and specify the Opportunity Value then this will be uploaded in the Forecast module on the date which you specified as Expected Closing Date in same page. Then select Private field if login users lower level executive should not view it. Select Lead Source, Currency, and Sales

Stage from the drop down list then enter the Reference Number and select the Status from the drop down list box.

Opportunities Add Opportunity [Search](#)

Opportunity Information:

Created By : Admin	Lead Source* : Select
Opportunity Owner* : Admin	Opportunity Value* : <input type="text"/>
Opportunity Name* : <input type="text"/>	Currency* : Select
Opportunity Category* : Select	Expected Close Date* : <input type="text"/>
Opportunity Group : None	Sales Stage* : Select
Opportunity Type* : Select	Probability (%)* : <input type="text"/>
Account Name* : Select	Next Sales Stage* : Select
Contact(s)* : <input type="text"/>	Reference No. : <input type="text"/>
	Status* : Select

Description:

Include for Forecast:

Private:

Save Save & New Reset Back

* - Mandatory Fields

Figure 13: Add Opportunity screen

Finally after entering all fields give Save so that the Project get saved or else if you want to delete the values then give Reset so that all the values gets cleared and it will empty then again you can star it from first or if you want to add another opportunity then give Save & New, so that the current record will get save and another new record will get open, if you want to move to previous page then give Back to move to the previous page.

10.2 My Opportunity

Through this page we can view the My Opportunity.

Search

Opportunities My Opportunities							
Opportunity Name	Opportunity Category	Opportunity Group	Account Name	Industry	Sales Stage	Opportunity Value ()	Exp. Close Date
Test Opportunity10	Desktop	iEXTENSIONS CRM	Test10	Professional Services	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity100	Desktop	iEXTENSIONS CRM	Test100	Professional Services	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity1000	Desktop	iEXTENSIONS CRM	Test1000	Professional Services	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity1001	Web	BLUE CRM	Test1001	Software	Negotiation / Review	1000	22-Apr-2006
Test Opportunity1002	Wireless	CRM on the GO	Test1002	Financial	Closed Won	1000	22-Apr-2006
Test Opportunity1003	Desktop	iEXTENSIONS CRM	Test1003	Professional Services	Closed Lost	1000	22-Apr-2006
Test Opportunity1004	Web	BLUE CRM	Test1004	Software	Demo	1000	22-Apr-2006
Test Opportunity1005	Wireless	CRM on the GO	Test1005	Financial	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity1006	Desktop	iEXTENSIONS CRM	Test1006	Professional Services	Negotiation / Review	1000	22-Apr-2006
Test Opportunity1007	Web	BLUE CRM	Test1007	Software	Closed Won	1000	22-Apr-2006
Test Opportunity1008	Wireless	CRM on the GO	Test1008	Financial	Closed Lost	1000	22-Apr-2006
Test Opportunity1009	Desktop	iEXTENSIONS CRM	Test1009	Professional Services	Demo	1000	22-Apr-2006
Test Opportunity101	Web	BLUE CRM	Test101	Software	Negotiation / Review	1000	22-Apr-2006
Test Opportunity1010	Web	BLUE CRM	Test1010	Software	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity1011	Wireless	CRM on the GO	Test1011	Financial	Negotiation / Review	1000	22-Apr-2006
Test Opportunity1012	Desktop	iEXTENSIONS CRM	Test1012	Professional Services	Closed Won	1000	22-Apr-2006
Test Opportunity1013	Web	BLUE CRM	Test1013	Software	Closed Lost	1000	22-Apr-2006
Test Opportunity1014	Wireless	CRM on the GO	Test1014	Financial	Demo	1000	22-Apr-2006
Test Opportunity1015	Desktop	iEXTENSIONS CRM	Test1015	Professional Services	Proposal / Price Quote	1000	22-Apr-2006
Test Opportunity1016	Web	BLUE CRM	Test1016	Software	Negotiation / Review	1000	22-Apr-2006

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Figure 14: My Opportunity Screen

If the Admin has given the privilege to the User then he can view the Opportunities of Him or otherwise, if Project Manager is login then he can view his opportunity status through My Opportunity. If you click the My Opportunity then My Opportunity page gets open, there each and every opportunity has link in Opportunity Name, if you click the Opportunity Name then the particular opportunity page gets open and there you can get a complete detail of the particular opportunity.

Opportunities Test Opportunity100

Opportunity Information:

Created By :	Admin	Lead Source:	Direct Mailers
Opportunity Owner:	Admin	Opportunity Value:	1000
Opportunity Name:	Test Opportunity100	Currency:	USD
Opportunity Category:	Desktop	Expected Close Date:	22-Apr-2006
Opportunity Group:	iEXTENSIONS CRM	Sales Stage:	Proposal / Price Quote
Opportunity Type:	Repeat Business	Probability (%):	50
Account Name:	Test100	Next Sales Stage:	Negotiation / Review
Contact(s):	Mr. Test Contact100	Reference No.	
		Status:	Hot

Description:	
Include for Forecast:	<input checked="" type="checkbox"/>
Private:	<input checked="" type="checkbox"/>

Edit **Delete** **Back**

Figure 15: Opportunity – Detailed view

11. Activities

The User can plan his / her activity and the same can be entered in the Activities Module and the completed Activities will be displayed in the Completed Activity log. The Open Activities are displayed as in figure 17.

[Search](#)

Activities **My Open Activities**

Select Location: User: Activity Type:

Due Date	Activity Type	Account / Company	Contact	Opportunity
22-Apr-2006	Administration !	Test3	Test Contact3	Test Opportunity3
22-Apr-2006	Administration !	Test6	Test Contact6	Test Opportunity6
22-Apr-2006	Administration !	Test9	Test Contact9	Test Opportunity9
22-Apr-2006	Administration !	Test12	Test Contact12	Test Opportunity12
22-Apr-2006	Administration !	Test15	Test Contact15	Test Opportunity15
22-Apr-2006	Administration !	Test18	Test Contact18	Test Opportunity18
22-Apr-2006	Administration !	Test21	Test Contact21	Test Opportunity21
22-Apr-2006	Administration !	Test24	Test Contact24	Test Opportunity24
22-Apr-2006	Administration !	Test27	Test Contact27	Test Opportunity27
22-Apr-2006	Administration !	Test30	Test Contact30	Test Opportunity30
22-Apr-2006	Administration !	Test33	Test Contact33	Test Opportunity33
22-Apr-2006	Administration !	Test36	Test Contact36	Test Opportunity36
22-Apr-2006	Administration !	Test39	Test Contact39	Test Opportunity39
22-Apr-2006	Administration !	Test42	Test Contact42	Test Opportunity42
22-Apr-2006	Administration !	Test45	Test Contact45	Test Opportunity45
22-Apr-2006	Administration !	Test48	Test Contact48	Test Opportunity48
22-Apr-2006	Administration !	Test51	Test Contact51	Test Opportunity51
22-Apr-2006	Administration !	Test54	Test Contact54	Test Opportunity54
22-Apr-2006	Administration !	Test57	Test Contact57	Test Opportunity57
22-Apr-2006	Administration !	Test60	Test Contact60	Test Opportunity60

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Figure 17: Activities

In this page the Due Date, Activity Type, Account / Company, Contact and Opportunity were displayed for that particular login user. To edit or delete a particular Project Activity, click the link on the Activity Type. It takes to the View Activity Page as shown in Figure 18 where the user can delete or edit a particular Activity.

Activities		View Activity	
Assigned By:	Admin	Priority:	High
Assigned To:	Admin	Account:	Test3
Activity Type:	Administration	Contact:	Test Contact3
Due Date:	22-Apr-2006	Opportunity:	Test Opportunity3
Completed:	X	Start Time:	
Completed Date:		End Time:	
Next Activity:			
Next Activity Type:		Start Time:	
Due Date:			
Description:			
Manager's Remarks:			
Private:	X		
Edit Delete Back			

Figure 18: View Activity

In this page, the detailed description of the Activity was displayed. To delete the activity, click the Delete link at the bottom of the page. It asks the confirmation message from the user whether to delete the activity or not.

11.4. Edit Activity

To edit a particular Activity, click on the Edit link. It paves to a new Edit Activity page as shown in Figure 6.2. The details of the particular activity are displayed in the textboxes. The User can edit / change the details of the Activity. After the changes have been made, the user has to click the save button to save the changes.

[Search](#)

Activities Edit Activity	
Assigned By: Admin	Priority: High
Assigned To: Admin	Account: Account
Activity Type: Administration	Contact: Test Contact3
Due Date: 22-Apr-2006 <small>RG</small>	Opportunity: Test Opportunity3
Completed: <input type="checkbox"/>	Start Time: HH Hr : Min Min
Completed Date: <small>RG</small>	End Time: HH Hr : Min Min
Next Activity:	
Next Activity Type: Select	Start Time: HH Hr : Min Min
Due Date: <small>RG</small>	
Description: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>	
Manager's Remarks: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>	
<input type="checkbox"/> Send Notification E-mail	
Private: <input type="checkbox"/>	
Save Save & New Reset Back	

* - Mandatory Fields

Figure 19: Edit Activity

11.5. New Activity

To add a New Activity, the User can click the link **New Activity** in the **Activities**. This leads to **Add Activity Page**, as shown in Figure 6.3. It adds activities Project wise.

Activities Add Activity [Sea](#)
[Acc](#)

Assigned By: Admin	Priority: Select
Assigned To: Admin	Account: Account
Activity Type: Select	Contact:
Due Date: [calendar icon]	Opportunity: Select
Completed: <input type="checkbox"/>	Start Time: HH Hr : Min Min
Completed Date: [calendar icon]	End Time: HH Hr : Min Min

Next Activity:

Next Activity Type: Select	Start Time: HH Hr : Min Min
Due Date: [calendar icon]	

Description: [text area]

Manager's Remarks: [text area]

Send Notification E-mail

Private:

Save Save & New Reset Back

* - Mandatory Fields

Figure 20: Add Activity

11.6. My Activity Log

The completed activities are displayed in the My Completed Activity Log Page. The completed activities are displayed as in figure 21. Here we can view the My Activity Log as Day wise, Location wise, User wise and Activity Type. If there is no record then the alert message will raise as there are no Activities as like in the figure 21.

Activities My Activity Log Search
Accounts [input] Search

Select Today Location: All User: All Activity Type: All **Go**

There are no Activities.

Figure 21: My Activity Log

If the admin has given the privilege to the user to edit or delete a particular Activity Log, click the link on the Activity Type. It takes to the View Activity Page, where the user can delete or edit a particular completed activity log.

In this page, the detailed description of the completed activity was displayed. To delete the completed activity, click the Delete link at the bottom of the page. It asks the confirmation message from the user whether to delete the completed activity or not.

12. Leads

The Leads page has three sub modules and they are New Lead, My Leads and All Leads and if the admin has given the privilege then through this Leads we can add a new lead and also we can view my leads and all leads.

12.1. New Lead

This sub-module is privilege based. Through this sub-module, users can create a new lead details like Lead Owner, First Name, Last Name, Company, Lead Source, Industry, Lead Status and Rating. The Figure 23 shows the New Lead page.

The screenshot shows the 'New Lead' form with the following fields and options:

- Lead Information:**
 - Created By: Admin
 - Select Location: Chicago
 - Lead Owner: Admin
 - Salutation: Mr.
 - First Name: [Text Field]
 - Last Name: [Text Field]
 - Company: [Text Field]
 - Job Title: [Text Field]
 - Lead Source: Select
 - Industry: Select
 - Annual Turnover: [Text Field]
 - Phone: [Text Field]
 - Mobile: [Text Field]
 - Fax: [Text Field]
 - Email: [Text Field]
 - Website: [Text Field]
 - Lead Status: Select
 - Rating: Select
 - Employees: [Text Field]
- Address Information:**
 - Street: [Text Field]
 - City: [Text Field]
 - State: [Text Field]
 - Zip / Postal Code: [Text Field]
 - Country: India
- Description:** [Text Area]
- Options:**
 - Send Notification E-mail:
 - Private:
 - Assign Lead using Lead Assignment Rule:

Buttons at the bottom: Save, Save & New, Reset, Back. Top right: Search, Account.

Figure 23: New Lead

12.2. My Leads

If the admin has given the privilege then we can view the my leads here we can view it by Lead Name wise and Company wise, then by clicking the Lead Name we can move to the Edit page of Lead and here we can edit, delete and by giving Back we can move to View page of a particular lead here we can convert the lead into a account by clicking the Convert button. We can convert a lead into account by clicking the convert in view page so that it moves to next page and there also we can edit more things if it is required and finally if we give Convert then the lead converts as an account and it will be added to the account page. In a page only 20 leads will be display and so other leads will be in next page. In bottom of the page the page numbers will be displayed we can also view by clicking page number links. The below figure shows the My Leads page.

Leads My Leads

Search

Lead Name All	Company All	Phone	Mobile	Email
Mr. Test Lead10	Test Acc10	912345566665	998765432322	test10@angleritech.com
Mr. Test Lead100	Test Acc100	912345566665	998765432322	test100@angleritech.com
Mr. Test Lead1000	Test Acc1000	912345566665	998765432322	test1000@angleritech.com
Mr. Test Lead1001	Test Acc1001	912345566665	998765432322	test1001@angleritech.com
Mr. Test Lead1002	Test Acc1002	912345566665	998765432322	test1002@angleritech.com
Mr. Test Lead1003	Test Acc1003	912345566665	998765432322	test1003@angleritech.com
Mr. Test Lead1004	Test Acc1004	912345566665	998765432322	test1004@angleritech.com
Mr. Test Lead1005	Test Acc1005	912345566665	998765432322	test1005@angleritech.com
Mr. Test Lead1006	Test Acc1006	912345566665	998765432322	test1006@angleritech.com
Mr. Test Lead1007	Test Acc1007	912345566665	998765432322	test1007@angleritech.com
Mr. Test Lead1008	Test Acc1008	912345566665	998765432322	test1008@angleritech.com
Mr. Test Lead1009	Test Acc1009	912345566665	998765432322	test1009@angleritech.com
Mr. Test Lead101	Test Acc101	912345566665	998765432322	test101@angleritech.com
Mr. Test Lead1010	Test Acc1010	912345566665	998765432322	test1010@angleritech.com
Mr. Test Lead1011	Test Acc1011	912345566665	998765432322	test1011@angleritech.com
Mr. Test Lead1012	Test Acc1012	912345566665	998765432322	test1012@angleritech.com
Mr. Test Lead1013	Test Acc1013	912345566665	998765432322	test1013@angleritech.com
Mr. Test Lead1014	Test Acc1014	912345566665	998765432322	test1014@angleritech.com
Mr. Test Lead1015	Test Acc1015	912345566665	998765432322	test1015@angleritech.com
Mr. Test Lead1016	Test Acc1016	912345566665	998765432322	test1016@angleritech.com

Page **1** 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25

26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50

51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75

76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Figure 24: My Leads

13. Forecasts

13.1. Sales Reports

13.2. Target Vs Actual – Period Wise

This report displays the Target Values and Actual Values for selected financial Year. The Target vs. Actual – Period Wise Reports page is shown as Figure 25.

[Search](#)

Reports Target vs Actual - Period wise

Accounts [Search](#)

Report Options

Select Year Select Month Select Location Select User Display

2005-2006
April
All
All
Branch Only

[Generate Report](#)
[Export to Excel](#)

Generated Report. [Print Report](#)

Year - 2005 - 2006, Month - April, Location - All, User - All, Displaying - Branch Only

	April 2005		March 2005		I Qtr (Apr 2005 - Jun 2005)		IV Qtr (Jan 2005 - Mar 2005)	
	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.
Total - Chicago	0	0	0	0	0	0	0	0
Total - Los Angeles	0	0	0	0	0	0	0	0
Total - New Jersey	0	0	0	0	0	0	0	0
Total - New york	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0

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Figure 25: Target vs Actual - Period Wise Report Page

The above report can be generated based on filtering the categories like Financial Year, Month, Location, Selected User and display with Branch also.

13.3. Target Vs Actual – Opportunity Group Wise

This report displays the Target Values and Actual Values for selected Opportunity Group Wise. The Target vs Actual – Opportunity Group Wise Reports page is shown as Figure 26.

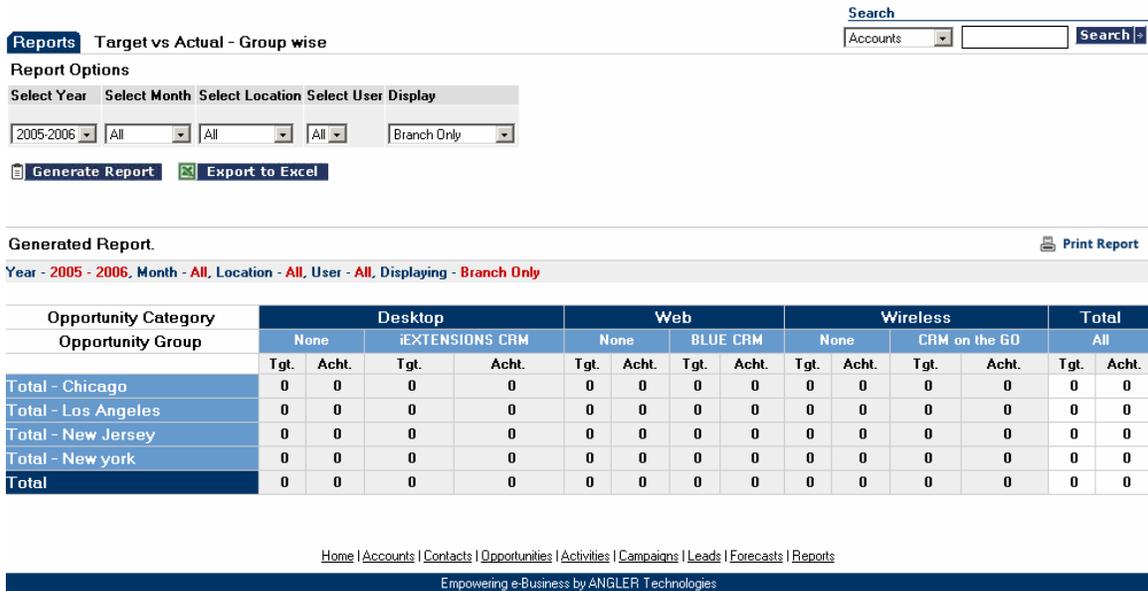


Figure 34: Target vs Actual - Opportunity Group Wise Report Page

The above report can be generated based on filtering the categories like Financial Year, Month, Location, Selected User and display with Branch also.

13.4. Forecast vs Actual – Period Wise

This report displays the Forecast Values and Actual Values for selected financial year. The Forecast vs Actual – Period Wise Reports page is shown as Figure 27.

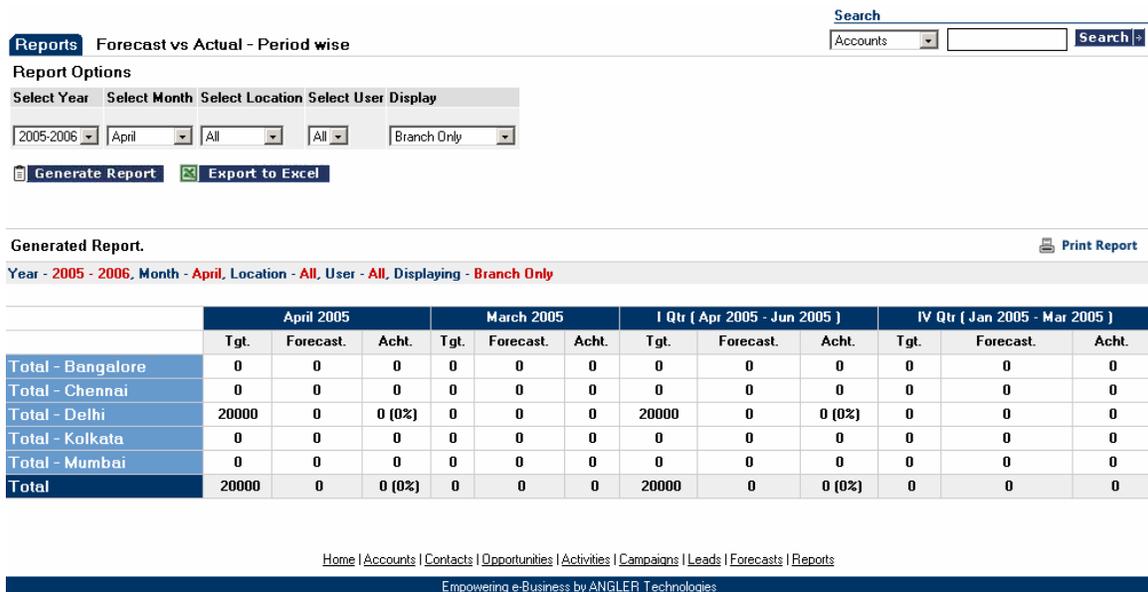


Figure 27: Forecast vs Actual – Period Wise Report Page

The above report can be generated based on filtering the categories like Financial Year, Month, Location, Selected User and display with Branch also.

13.5. Forecast vs. Actual – Opportunity Group Wise

This report displays the Forecast Values and Actual Values for selected Opportunity Group Wise. The Forecast vs Actual – Opportunity Group Wise Reports page is shown as Figure 28.

Reports Forecast vs Actual - Group wise

Search Accounts [] Search

Report Options

Select Year Select Month Select Location Select User Display

2005-2006 All All All Branch Only

Generate Report Export to Excel

Generated Report. Print Report

Year - 2005 - 2006, Month - All, Location - All, User - All, Displaying - Branch Only

Opportunity Category	Desktop						Web						Wireless						Total		
	None		iEXTENSIONS CRM		None		BLUE CRM		None		CRM on the GO		None		All						
Opportunity Group	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.	Tgt.	Forecast	Acht.
Total - Chicago	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total - Los Angeles	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total - New Jersey	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total - New york	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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Figure 28: Forecast vs Actual - Opportunity Group Wise Report Page

The above report can be generated based on filtering the categories like Financial Year, Month, Location, Selected User and display with Branch also.

14. Reports

14.1. Accounts and Contact Reports

The data on Accounts and Contact Reports are displayed in various categories as follows:

14.1.1. Report on Active Accounts

This report displays the list of Account Name, Account Category, City, Account Owner, Created Date and Last Activity of Active Accounts. The Active Reports page is shown as Figure 29.

[Search](#)

Reports Active Accounts

Report Options

View	Account Category	Location	Industry	Ownership	Interval	Start Date	End Date
<input type="text" value="All Accounts"/>	<input type="text" value="All"/>	<input type="text" value="Chicago"/>	<input type="text" value="Professional Services"/>	<input type="text" value="Private"/>	<input type="text" value="Created"/>	<input type="text" value="Custom"/>	<input type="text"/>

Generated Report.

Active Accounts (833 Records) Account Category - All, Location - Chicago, Industry - Professional Services, Ownership - Private, Accounts - All Accounts

Account Name	Account Category	City	Account Owner	Created Date	Last Activity
Test9838		test city11	Mr. Admin	20-Apr-2006	
Test9850		test city23	Mr. Admin	20-Apr-2006	
Test9862		test city10	Mr. Admin	20-Apr-2006	
Test9874		test city22	Mr. Admin	20-Apr-2006	
Test9886		test city9	Mr. Admin	20-Apr-2006	
Test9898		test city21	Mr. Admin	20-Apr-2006	
Test9910		test city8	Mr. Admin	20-Apr-2006	
Test9922		test city20	Mr. Admin	20-Apr-2006	
Test9934		test city7	Mr. Admin	20-Apr-2006	
Test994		test city17	Mr. Admin	20-Apr-2006	
Test9946		test city19	Mr. Admin	20-Apr-2006	
Test9958		test city6	Mr. Admin	20-Apr-2006	
Test9970		test city18	Mr. Admin	20-Apr-2006	
Test9982		test city5	Mr. Admin	20-Apr-2006	
Test9994		test city17	Mr. Admin	20-Apr-2006	

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Figure 29: Active Accounts Report Page

The above report can be generated based on filtering the categories like View, Account Category, Location, Industry, Ownership, Interval and Date also.

14.1.2. Report on Neglected Accounts

This report displays the list of Account Name, Account Category, City, Account Owner, Last Updated Date and Location of Neglected Accounts. The Neglected Reports page is shown as Figure 30.

Search

Accounts Search

Reports Neglected Accounts

Report Options

View	Account Category	Location	Industry	Ownership	No Activity since
All Accounts	All	Los Angeles	Professional Services	Private	

Generated Report.

Neglected Accounts (833 Records) Account Category - All, Location - Chicago, Industry - Professional Services, Ownership - Private, Accounts - All Accounts

Account Name	Account Category	City	Account Owner	Last Updated Date	Location
Test9850		test city23	Mr. Admin	20-Apr-2006	Chicago
Test9862		test city10	Mr. Admin	20-Apr-2006	Chicago
Test9874		test city22	Mr. Admin	20-Apr-2006	Chicago
Test9886		test city9	Mr. Admin	20-Apr-2006	Chicago
Test9898		test city21	Mr. Admin	20-Apr-2006	Chicago
Test9910		test city8	Mr. Admin	20-Apr-2006	Chicago
Test9922		test city20	Mr. Admin	20-Apr-2006	Chicago
Test9934		test city7	Mr. Admin	20-Apr-2006	Chicago
Test994		test city17	Mr. Admin	20-Apr-2006	Chicago
Test9946		test city19	Mr. Admin	20-Apr-2006	Chicago
Test9958		test city6	Mr. Admin	20-Apr-2006	Chicago
Test9970		test city18	Mr. Admin	20-Apr-2006	Chicago
Test9982		test city5	Mr. Admin	20-Apr-2006	Chicago
Test9994		test city17	Mr. Admin	20-Apr-2006	Chicago

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Figure 30: Neglected Accounts Report Page

The above report can be generated based on filtering the categories like View, Account Category, Location, Industry, Ownership and last activity also.

14.1.3. Report on Accounts by User

This report displays the list of Account Name, Account Category, City, Ownership, Last Updated Date and Location of the Accounts for the Selected Owner. The Accounts by User Reports page is shown as Figure 31.

Search

Accounts Search

Reports Accounts by User

Report Options

Select User	Account Category	Location	Industry	Ownership	Interval	Start Date	End Date
Admin John Smith Robert Smith Sheila Jone	All	All	All	All	Created	Custom	

Show Graphical Report also.

Generated Report.

Report Summarized by Account Owner

Account Category - All, Location - All, Industry - All, Ownership - All

Admin (9997 Records)

Account Name	Account Category	Industry	City	Ownership	Last Updated Date	Location
--------------	------------------	----------	------	-----------	-------------------	----------

Test9986	Software	test city9	Private	20-Apr-2006	Chicago
Test9987	Financial	test city10	Private	20-Apr-2006	New Jersey
Test9988	Professional Services	test city11	Private	20-Apr-2006	New york
Test9989	Software	test city12	Private	20-Apr-2006	Los Angeles
Test999	Financial	test city22	Private	20-Apr-2006	New Jersey
Test9990	Financial	test city13	Private	20-Apr-2006	Chicago
Test9991	Professional Services	test city14	Private	20-Apr-2006	New Jersey
Test9992	Software	test city15	Private	20-Apr-2006	New york
Test9993	Financial	test city16	Private	20-Apr-2006	Los Angeles
Test9994	Professional Services	test city17	Private	20-Apr-2006	Chicago
Test9995	Software	test city18	Private	20-Apr-2006	New Jersey
Test9996	Financial	test city19	Private	20-Apr-2006	New york
Test9997	Professional Services	test city20	Private	20-Apr-2006	Los Angeles
Test9998	Software	test city21	Private	20-Apr-2006	Chicago
Test9999	Financial	test city22	Private	20-Apr-2006	New Jersey

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Figure 31: Accounts by User Report Page

The above report can be generated based on filtering the categories like User, Account Category, Location, Industry, Ownership, Interval and Date also.

14.1.4. Mailing List

This report displays the list of Name, Job Title, Contact Category, Mobile, Fax, Email_id, Address, Contact Owner and Account of the Contact Person. The Mailing List page is shown as Figure 32.

Reports Mailing List

Report Options

View	Location	Contact Category
All Contacts	All	All

Generated Report.

Mailing List (9997 Records) [Contacts](#) - [All Contacts](#), [Location](#) - [All](#), [Contact Category](#) - [All](#)

Name	Job Title	Birthdate	Contact Category	Phone	Mobile	Fax	Email	Street	City	Location	State	Postal Code	Co
Mr. Test Contact9990	Test Job9990		Top Mgmt	913333356456	989898765544	933333876987	test9990@angleritech.com	test street9990	test city9990	Chicago	test state9990	625 002	
Mr. Test Contact9991	Test Job9991		Executive / General Staff	913333356456	989898765544	933333876987	test9991@angleritech.com	test street9991	test city9991	New Jersey	test state9991	625 002	
Mr. Test Contact9992	Test Job9992		Influencer	913333356456	989898765544	933333876987	test9992@angleritech.com	test street9992	test city9992	New york	test state9992	625 002	
Mr. Test Contact9993	Test Job9993		Technical	913333356456	989898765544	933333876987	test9993@angleritech.com	test street9993	test city9993	Los Angeles	test state9993	625 002	
Mr. Test Contact9994	Test Job9994		Top Mgmt	913333356456	989898765544	933333876987	test9994@angleritech.com	test street9994	test city9994	Chicago	test state9994	625 002	
Mr. Test Contact9995	Test Job9995		Executive / General Staff	913333356456	989898765544	933333876987	test9995@angleritech.com	test street9995	test city9995	New Jersey	test state9995	625 002	
Mr. Test Contact9996	Test Job9996		Influencer	913333356456	989898765544	933333876987	test9996@angleritech.com	test street9996	test city9996	New york	test state9996	625 002	
Mr. Test Contact9997	Test Job9997		Technical	913333356456	989898765544	933333876987	test9997@angleritech.com	test street9997	test city9997	Los Angeles	test state9997	625 002	
Mr. Test Contact9998	Test Job9998		Top Mgmt	913333356456	989898765544	933333876987	test9998@angleritech.com	test street9998	test city9998	Chicago	test state9998	625 002	
Mr. Test Contact9999	Test Job9999		Executive / General Staff	913333356456	989898765544	933333876987	test9999@angleritech.com	test street9999	test city9999	New Jersey	test state9999	625 002	

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Figure 32: Mailing List Report Page

ANGLER Technologies India Pvt Ltd - confidential-
 "Jupiter House", 8/1144 Trichy Road, Cbe – 45, India
 Ph: 91-422-2312707 / 2313938 Fax: 91-422-2313936

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www.angleritech.com

The above report can be generated based on filtering the categories like View, Location and Contact Category also.

14.1.5. New Accounts

This report displays the list of Account Name, Account Category, Industry, City, Account Owner, Ownership, Last Updated Date and Location of the Newly created Accounts. The New Accounts Reports page is shown as Figure 33.

[Search](#)

Reports **New Accounts**

Report Options

View	Account Category	Location	Industry	Ownership	Created since
<input type="text" value="All Accounts"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text"/>

Generated Report.

New Accounts [9997 Records] Account Category - All, Location - All, Industry - All, Ownership - All, Accounts - All Accounts

Account Name	Account Category	Industry	City	Account Owner	Ownership	Last Updated Date	Location
Test9984		Financial	test city7	Mr. Admin	Private	20-Apr-2006	New york
Test9985		Professional Services	test city8	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9986		Software	test city9	Mr. Admin	Private	20-Apr-2006	Chicago
Test9987		Financial	test city10	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9988		Professional Services	test city11	Mr. Admin	Private	20-Apr-2006	New york
Test9989		Software	test city12	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test999		Financial	test city22	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9990		Financial	test city13	Mr. Admin	Private	20-Apr-2006	Chicago
Test9991		Professional Services	test city14	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9992		Software	test city15	Mr. Admin	Private	20-Apr-2006	New york
Test9993		Financial	test city16	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9994		Professional Services	test city17	Mr. Admin	Private	20-Apr-2006	Chicago
Test9995		Software	test city18	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9996		Financial	test city19	Mr. Admin	Private	20-Apr-2006	New york
Test9997		Professional Services	test city20	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9998		Software	test city21	Mr. Admin	Private	20-Apr-2006	Chicago
Test9999		Financial	test city22	Mr. Admin	Private	20-Apr-2006	New Jersey

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Figure 33: New Accounts Report Page

The above report can be generated based on filtering the categories like View, Account Category, Location, Industry, Ownership and last created also.

14.1.6. Accounts by Industry

This report displays the list of Account Name, Account Category, City, Account Owner, Ownership, Last Updated Date and Location of the Accounts from selected Industry. The Accounts by Industry Report page is shown as Figure 34.

[Search](#)

Reports Accounts by Industry

Report Options

Industry	Account Category	Location	View	Ownership	Interval	Start Date	End Date
<input type="text" value="All"/> <input type="text" value="Financial"/> <input type="text" value="Professional Services"/> <input type="text" value="Software"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="All Accounts"/>	<input type="text" value="All"/>	<input type="text" value="Created"/>	<input type="text" value="Custom"/>	<input type="text"/>

Show Graphical Report also.

Generated Report.

Report Summarized by Industry

Account Category - All, Location - All, Ownership - All, Accounts - All Accounts

Professional Services (3332 Records)

Account Name	Account Category	City	Account Owner	Ownership	Last Updated Date	Location
Test9952		test city25	Mr. Admin	Private	20-Apr-2006	New york
Test9955		test city3	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9958		test city6	Mr. Admin	Private	20-Apr-2006	Chicago
Test9961		test city9	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9964		test city12	Mr. Admin	Private	20-Apr-2006	New york
Test9967		test city15	Mr. Admin	Private	20-Apr-2006	New Jersey
Test997		test city20	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9970		test city18	Mr. Admin	Private	20-Apr-2006	Chicago
Test9973		test city21	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9976		test city24	Mr. Admin	Private	20-Apr-2006	New york
Test9979		test city2	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9982		test city5	Mr. Admin	Private	20-Apr-2006	Chicago
Test9985		test city8	Mr. Admin	Private	20-Apr-2006	Los Angeles
Test9988		test city11	Mr. Admin	Private	20-Apr-2006	New york
Test9991		test city14	Mr. Admin	Private	20-Apr-2006	New Jersey
Test9994		test city17	Mr. Admin	Private	20-Apr-2006	Chicago
Test9997		test city20	Mr. Admin	Private	20-Apr-2006	Los Angeles

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Figure 34: Accounts by Industry Report Page

The above report can be generated based on filtering the categories like Industry, Account Category, Location, View, Ownership, Interval and Date also.

14.1.7. Accounts by Location

This report displays the list of Account Name, City, Account Owner, Ownership, Last Updated Date and Location of the Accounts from selected Location. The Accounts by Location Report page is shown as Figure 35.

[Search](#)
 Accounts [Search](#)

Reports Accounts by Location

Report Options

Account Category	Select Location	Industry	Ownership	Interval	Start Date	End Date
All	All Chicago Los Angeles New Jersey New york	Professional Services	All	Created	Custom	

Show Graphical Report also.

[Generate Report](#) [Export to Excel](#)

Generated Report. [Print Report](#)

Report Summarized by Location

Account Category - All, Industry - Professional Services, Ownership - All

Chicago (833 Records)

Account Name	City	Account Owner	Ownership	Last Updated Date	Location
Test9814	test city12	Mr. Admin	Private	20-Apr-2006	Chicago
Test982	test city5	Mr. Admin	Private	20-Apr-2006	Chicago
Test9826	test city24	Mr. Admin	Private	20-Apr-2006	Chicago
Test9838	test city11	Mr. Admin	Private	20-Apr-2006	Chicago
Test9850	test city23	Mr. Admin	Private	20-Apr-2006	Chicago
Test9862	test city10	Mr. Admin	Private	20-Apr-2006	Chicago
Test9874	test city22	Mr. Admin	Private	20-Apr-2006	Chicago
Test9886	test city9	Mr. Admin	Private	20-Apr-2006	Chicago
Test9898	test city21	Mr. Admin	Private	20-Apr-2006	Chicago
Test9910	test city8	Mr. Admin	Private	20-Apr-2006	Chicago
Test9922	test city20	Mr. Admin	Private	20-Apr-2006	Chicago
Test9934	test city7	Mr. Admin	Private	20-Apr-2006	Chicago
Test994	test city17	Mr. Admin	Private	20-Apr-2006	Chicago
Test9946	test city19	Mr. Admin	Private	20-Apr-2006	Chicago
Test9958	test city6	Mr. Admin	Private	20-Apr-2006	Chicago
Test9970	test city18	Mr. Admin	Private	20-Apr-2006	Chicago
Test9982	test city5	Mr. Admin	Private	20-Apr-2006	Chicago
Test9994	test city17	Mr. Admin	Private	20-Apr-2006	Chicago

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Figure 35: Accounts by Location Report Page

The above report can be generated based on filtering the categories like Account Category, Location, Industry, Ownership, Interval and Date also.

14.2. Opportunity Reports

14.2.1. Opportunities by Accounts

This report displays the list of Account Name, Account Category, City, Account Owner, Created Date and Last Activity of Active Accounts. The Active Reports page is shown as Figure 36.

Reports Opportunities by Account Accounts

Report Options

Accounts	Status	Opp. Category	Sales Stage	Opportunities	Interval	Start Date	End Date
<input type="text" value="fasd"/> <ul style="list-style-type: none"> fasfereqae fdas fdsfas fsadffsdfa GaneAcc Govinda Account MuruganAcc 	All	All	All	All Opportunities	Exp. Close Date	Custom	<input type="text"/>

Show Graphical Report also.

Generated Report.

Report Summarized by Accounts

Sales Stage - All, Opp. Status - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

(3 Records)

Opportunity	Status	Opp. Owner	Opp. Cat	Account	Location	Industry	Type	Sales Stage	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualification	Lead Source Three	330000	33000	10	12-Apr-2006	25-Apr
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Apr
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecting	Lead Source One	330000	16500	5	14-Apr-2006	25-Apr
Total Opp. Value = 4090000 , Expected Amount = 564000														

(3 Records)

Opportunity	Status	Opp. Owner	Opp. Cat	Account	Location	Industry	Type	Sales Stage	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualification	Lead Source Three	330000	33000	10	12-Apr-2006	25-Apr
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Apr
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecting	Lead Source One	330000	16500	5	14-Apr-2006	25-Apr
Total Opp. Value = 4090000 , Expected Amount = 564000														

(3 Records)

Opportunity	Status	Opp. Owner	Opp. Cat	Account	Location	Industry	Type	Sales Stage	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualification	Lead Source Three	330000	33000	10	12-Apr-2006	25-Apr
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Apr
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecting	Lead Source One	330000	16500	5	14-Apr-2006	25-Apr
Total Opp. Value = 4090000 , Expected Amount = 564000														

Figure 36: Opportunities by Accounts Report Page

14.2.2. Opportunities by Pipeline

This report displays the list of Sales Stage, Location, Industry, Opp. Category, Opportunities, Interval, Start Date and End Date. The Opportunities by Pipeline Reports page is shown as Figure 37.

Reports Opportunity Pipeline Accounts

Report Options

Sales Stage	Location	Industry	Opp. Category	Opportunities	Interval	Start Date
All Prospecting Qualification Demo Needs Analysis Id. Decision Makers Proposal / Price Quote Negotiation / Review	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generated Report.

Report Summarized by Sales Stage

Location - All, Industry - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

Prospecting (2 Records)

Opportunity	Opp. Owner	Opp. Cat	Account	Location	Industry	Type	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activity
fasfa	Mr. srinivasan	Multimedia	fsadrlafsdia	COIMBATORE	Art Industry2	E	Lead Source Three	3420000	171000	5	21-Apr-2006	25-Apr-2006	
sdia	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Lead Source One	3300000	16500	5	14-Apr-2006	25-Apr-2006	

Total Opp. Value = 3750000 , Expected Amount = 187500

Figure 37: Opportunities by Pipeline Report Page

14.2.3. Opportunities by Category

This report displays the list of Sales Stage, Location, Industry, Opp. Category, Opportunities, Interval, Start Date and End Date, here reports are display as selected category wise. The Opportunities by Category Reports page is shown as Figure 38.

Reports Opportunities by Category Accounts

Report Options

Opp. Category	Location	Sales Stage	Industry	Opportunities	Interval	Start Date
All E-Biz Multimedia Products Web	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generated Report.

Report Summarized by Opportunity Category

Location - All, Sales Stage - All, Industry - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

E-Biz (1 Record)

Opportunity	Sales Stage	Opp. Owner	Account	Location	Industry	Type	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activity
fasfas	Demo	Mr. Admin	GaneAcc	ERODE	Automotive Industry3	E	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Apr-2006	

Total Opp. Value = 3430000 , Expected Amount = 514500

Figure 38: Opportunities by Category Report Page

14.2.4. Stuck Opportunities

This report displays the list of Sales Stage, Location, Industry, Opp. Category, Opportunities, Interval, Start Date and End Date. The Opportunities by Stuck Opportunities Reports page is shown as Figure 39.

Reports Stuck Opportunities Accounts Search

Report Options

Sales Stage	Location	Industry	Opp. Category	Opportunities	Not Updated since	No Activity since
All	All	All	All	All Opportunities		

Show Graphical Report also.

Generate Report **Export to Excel**

Generated Report. **Print Report**

Report Summarized by Sales Stage

Location - All, Industry - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

Prospecting (2 Records)

Opportunity	Opp. Owner	Opp. Cat	Account	Industry	Type	Location	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activity
fasfa	Mr. srinivasan m	Multimedia	fsadffafsdfa	Art Industry2	E	COIMBATORE	Lead Source Three	3420000	171000	5	21-Apr-2006	25-Apr-2006	
sdfa	Mr. Admin	Multimedia	Govinda Account	Art Industry2	E	COIMBATORE	Lead Source One	330000	16500	5	14-Apr-2006	25-Apr-2006	

Total Opp. Value = 3750000 , Expected Amount = 187500

Figure 39: Report Page for Stuck Opportunity

14.2.5. Closed Opportunities

This report displays all closed opportunities and also it displays in two categories and they are Closed Won and Closed Lost. The Figure 40 shows the Closed Opportunities page.

Reports Closed Opportunities Accounts

Report Options

View	Location	Industry	Acc. Category	Opp. Category	Opportunities	Interval	Start Date
Closed Lost	All	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generate Report **Export to Excel**

Generated Report. **Print Report**

Report Summarized by Closed Opportunities

Location - All, Account Category - All, Sales Stage - All, Industry - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

Closed Lost (0 Record)

No records matched.

Closed Won (1 Record)

Opportunity	Opp. Owner	Opp. Cat	Account	Account Category	Location	Industry	Type	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated
test	Mr. srinivasan m	E-Biz	GaneAcc		ERODE	Automotive Industry3	E	Lead Source One	200000000	200000000	100	21-Apr-2005	25-Apr-2006

Total Opp. Value = 200000000 , Expected Amount = 200000000

Figure 40: Report Page for Closed Opportunity

14.2.6. Opportunities by Location

This report displays the opportunities by Location wise as selected in the drop down. The Figure 41 shows the Opportunities by Location wise page.

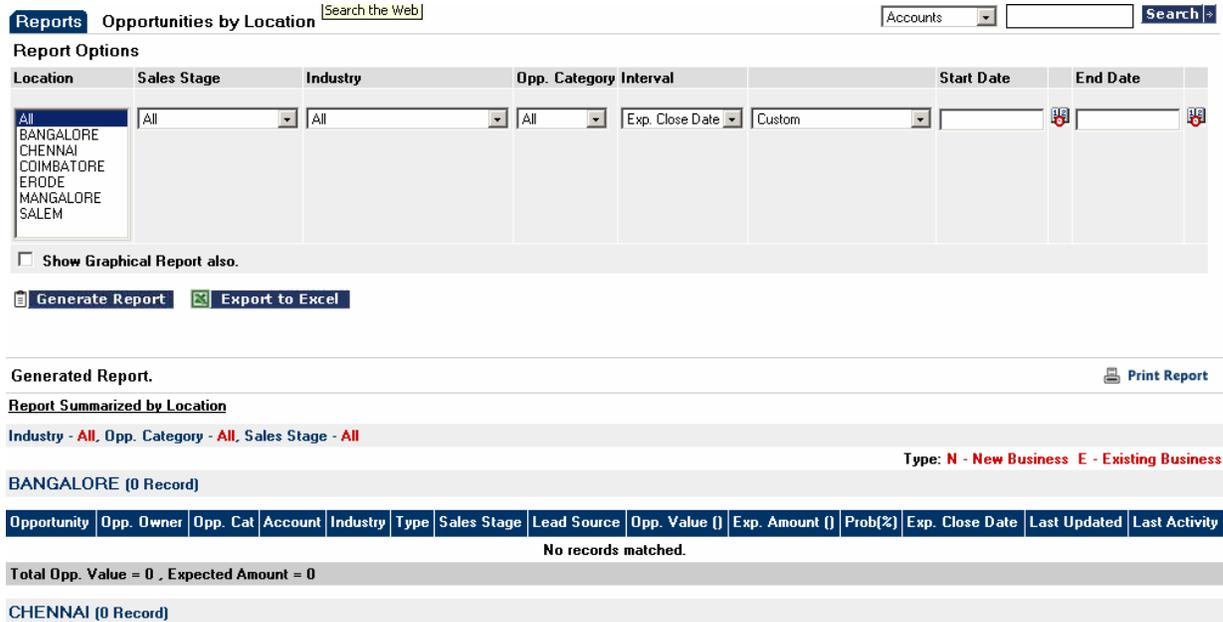


Figure 41: Opportunities by Location

14.2.7. Opportunities by User

This report displays the list of Due Date, Account/Company, Contact, Opportunity, Start Time, End Time, Status and Completed Date of Activities for the selected User. The User Wise Reports page is shown as Figure 42.

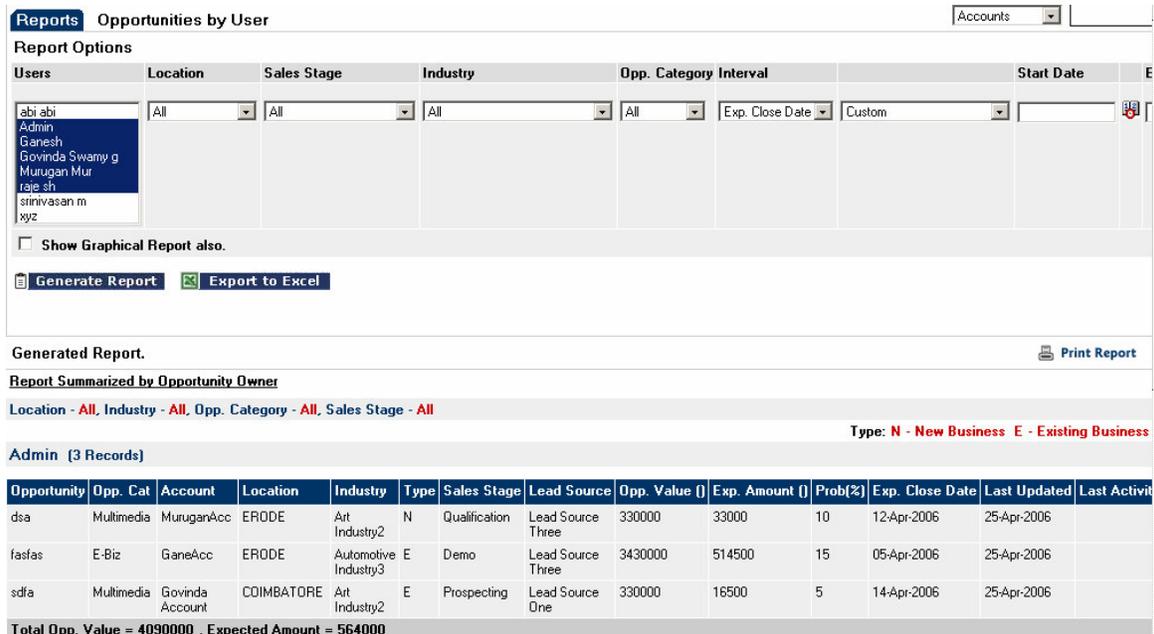


Figure 42: Opportunities by User

14.2.8. Opportunities by Type

This report displays the opportunities by Opportunity Type wise as selected in the drop down. The Figure 43 shows the Opportunities by Type wise page.

Reports Opportunities by Type Accor

Report Options

Opportunity Type	Location	Sales Stage	Industry	Opp. Category	Opportunities	Interval	
New Business	All	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generate Report **Export to Excel**

Generated Report. **Print Report**

Report Summarized by Opportunity Type

Location - All, Sales Stage - All, Industry - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

New Business (1 Record)

Opportunity	Sales Stage	Opp. Owner	Opp. Cat	Account	Location	Industry	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activ
dsa	Qualification	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	Lead Source Three	330000	33000	10	12-Apr-2006	25-Apr-2006	

Total Opp. Value = 330000 , Expected Amount = 33000

Figure 43: Opportunities by Type

14.2.9. Opportunities by Industry

This report displays the opportunities by Industry wise as selected in the drop down. The Figure 44 shows the Opportunities by Industry wise page.

Reports Opportunities by Industry Accounts

Report Options

Industry	Location	Sales Stage	Opp. Category	Opportunities	Interval	Start Date
All	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generate Report **Export to Excel**

Generated Report. **Print Report**

Report Summarized by Industry

Location - All, Sales Stage - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

Agri & cultivation Industry1 (0 Record)

Opportunity	Sales Stage	Opp. Owner	Opp. Cat	Account	Location	Type	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activity
No records matched.													

Total Opp. Value = 0 , Expected Amount = 0

Art Industry2 (4 Records)

Figure 44: Opportunities by Industry

14.2.10. Opportunities by Sources

This report displays the opportunities by Source wise as selected in the drop down. The Figure 45 shows the Opportunities by Source wise page.

Reports Opportunities by Source
Acc

Report Options

Lead Source	Location	Opp. Category	Sales Stage	Industry	Opportunities	Interval	
All Lead Source One Lead Source Three	All	All	All	All	All Opportunities	Exp. Close Date	Custom

Show Graphical Report also.

Generated Report. Print Report

Report Summarized by Opportunity Source

Location - All, Sales Stage - All, Industry - All, Opp. Category - All, Opportunities - All Opportunities Type: N - New Business E - Existing Business

Lead Source One (2 Records)

Opportunity	Sales Stage	Opp. Owner	Opp. Cat	Account	Location	Industry	Type	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last Updated	Last Activity
sda	Qualification	Mr. abi abi	Web	MuruganAcc	ERODE	Art Industry2	E	3430000	343000	10	07-Apr-2006	25-Apr-2006	
sdfa	Prospecting	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	330000	16500	5	14-Apr-2006	25-Apr-2006	

Total Opp. Value = 3760000 , Expected Amount = 359500

Figure 45: Opportunities by Sources

14.2.11. Opportunities History

This report displays the History of the Opportunity as selected in the drop down. The Figure 46 shows the Opportunities History page.

Reports Opportunity History Accounts Search

Report Options

Accounts	Opportunities	Sales Stage		Start Date	End Date
GaneAcc	All sss test fasfas	All	Custom		

Generated Report.

Report Summarized by Opportunity

Account - **GaneAcc**, Sales Stage - **All** Type: **N** - New Business **E** - Existing Business

fasfas (1 Record), Opp. Category - E-Biz, Type - E, Lead Source - Lead Source Three

Opp. Owner	Sales Stage	Opp. Value	Exp. Amont	Prob(%)	Exp. Close Date	Last Updated	Account Category
Mr. Admin	Demo	3430000	514500	15	05-Apr-2006	25-Apr-2006	

sss (1 Record), Opp. Category - Multimedia, Type - E, Lead Source - Lead Source One

Opp. Owner	Sales Stage	Opp. Value	Exp. Amont	Prob(%)	Exp. Close Date	Last Updated	Account Category
Mr. Ganesh	Negotiation / Review	120000	96000	80	24-Apr-2006	25-Apr-2006	

Figure 46: Opportunity History

14.3. Activity Reports

The data on the Project Activities are displayed in various categories as follows:

14.3.1. Activities by Account

This report displays the list of Due Date, Activity Type, Contact, Opportunity, Activity Owner, Start Time, End Time, Status and Completed Date of Activities for the selected Account. The Activities by Account Reports page is shown as Figure 47.

Search
Accounts **Search**

Reports Activities by Account

Report Options

Select Account	Activity Type	Status	Interval	Start Date	End Date
Test10 Test100 Test1000 Test1001 Test1002 Test1003 Test1004 Test1005	All	All	Custom		

Show Graphical Report also.

Generate Report **Export to Excel**

Generated Report. [Print Report](#)

Report Summarized by Account

Activity Type - All, Status - All Status: X - Not Completed ✓ - Completed

Test10 (1 Record)

Due Date	Activity Type	Contact	Opportunity	Activity Owner	Start Time	End Time	Status	Completed Date
22-Apr-2006	Appointment Request	Test Contact10	Test Opportunity10	Admin			X	
Total Time = 0 Hr 0 min								

Test100 (1 Record)

Due Date	Activity Type	Contact	Opportunity	Activity Owner	Start Time	End Time	Status	Completed Date
22-Apr-2006	Appointment Request	Test Contact100	Test Opportunity100	Admin			X	
Total Time = 0 Hr 0 min								

Test1000 (1 Record)

Due Date	Activity Type	Contact	Opportunity	Activity Owner	Start Time	End Time	Status	Completed Date
22-Apr-2006	Appointment Request	Test Contact1000	Test Opportunity1000	Admin			X	
Total Time = 0 Hr 0 min								

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Figure 47: Activities by Account Report Page

The above report can be generated based on filtering the categories like Account, Activity Type, Status, Interval and Date also.

14.3.2. Lead Wise

This report displays the list of Due Date, Activity Type, Activity Owner, Start Time, End Time, Status and Completed Date of Activities for the selected Lead. The Lead Wise Reports page is shown as Figure 48.

Search

Reports Activities by Lead

Report Options

Select Lead	Activity Type	Status	Interval	Start Date	End Date
Test Lead10 - Test Acc10 Test Lead100 - Test Acc100 Test Lead1000 - Test Acc1000 Test Lead1001 - Test Acc1001 Test Lead1002 - Test Acc1002 Test Lead1003 - Test Acc1003 Test Lead1004 - Test Acc1004 Test Lead1005 - Test Acc1005	All	All	Custom		

Show Graphical Report also.

Generated Report.

Report Summarized by Leads

Activity Type - All, Status - All Status: X - Not Completed ✓ - Completed

Test Lead10 - Test Acc10 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Test Lead1441 - Test Acc1441 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Test Lead1442 - Test Acc1442 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Test Lead1443 - Test Acc1443 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Test Lead1444 - Test Acc1444 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Test Lead1445 - Test Acc1445 (0 Record)

Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
No records matched.						
Total Time = 0 Hr 0 min						

Figure 48: Lead Wise Report Page

The above report can be generated based on filtering the categories like Lead, Activity Type, Status, Interval and Date also.

14.3.3. Opportunity Wise

This report displays the list of Due Date, Activity Type, Contact, Activity Owner, Start Time, End Time, Status and Completed Date of Activities for the selected Opportunity. The Opportunity Wise Reports page is shown as Figure 49.

Search
 Accounts

Reports Activities by Opportunity

Report Options

Accounts	Opportunities	Activity Type	Status	Interval	Start Date	End Date
Test10	All Test Opportunity10	All	All	Custom		

Show Graphical Report also.

Generated Report.

Report Summarized by Opportunity

Account - Test10, Activity Type - All, Status - All

Status: X - Not Completed ✓ - Completed

Test Opportunity10 (1 Record)

Due Date	Activity Type	Contact	Activity Owner	Start Time	End Time	Status	Completed Date
22-Apr-2006	Appointment Request	Test Contact10	Admin			X	

Total Time = 0 Hr 0 min

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Figure 49: Opportunity Wise Report Page

The above report can be generated based on filtering the categories like Accounts, Opportunities, Activity Type, Status, Interval and Date also.

14.3.4. User Wise

This report displays the list of Due Date, Account/Company, Contact, Opportunity, Start Time, End Time, Status and Completed Date of Activities for the selected User. The User Wise Reports page is shown as Figure 50.

Search
 Accounts

Reports Activities by User

Report Options

Select User	Activity Type	Status	Interval	Start Date	End Date
Admin John Smith Robert Smith Sheila Jone	All	All	Custom		

Show Graphical Report also.

Generated Report.

Report Summarized by User

Activity Type - All, Status - All Status: X - Not Completed ✓ - Completed

John Smith (0 Record)

Due Date	Activity Type	Account/Company	Contact	Opportunity	Start Time	End Time	Status	Completed Date
No records matched.								
Total Time = 0 Hr 0 min								

Robert Smith (2 Records)

Due Date	Activity Type	Account/Company	Contact	Opportunity	Start Time	End Time	Status	Completed Date
02-May-2006	Administration	Test1452	Test Contact1452	Test Opportunity1452			X	
28-Apr-2006	Administration	Test1452	Test Contact1452	Test Opportunity1452			X	
Total Time = 0 Hr 0 min								

Sheila Jone (0 Record)

Due Date	Activity Type	Account/Company	Contact	Opportunity	Start Time	End Time	Status	Completed Date
No records matched.								
Total Time = 0 Hr 0 min								

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Figure 50: User Wise Report Page

The above report can be generated based on filtering the categories like User, Activity Type, Status, Interval and Date also.

14.4. Lead Reports

The data on the Leads are displayed in various categories as follows:

14.4.1. Neglected Leads

This report displays the list of Name, Company, Job Title, Lead Source, Industry, Phone, Mobile, Fax, Email_id, Status, Rating, Lead Owner, Created Date and Last activity of Neglected Leads. The Neglected Leads Reports page is shown as Figure 51.

Reports **Neglected Leads** Accounts

Report Options

View	Industry	Lead Source	Status	Rating	No Activity since
All Leads	All	All	All	All	<input type="text"/>

Generated Report.

Neglected Leads (9997 Records)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Status	Rating	Lead Owner	Created Date	La
Mr. Test Lead999	Test Acc999	Test Job999	Advertisement	Financial	912345566665	098765432322	987654343333333	test999@angleritech.com	Qualified	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9990	Test Acc9990	Test Job9990	Advertisement	Financial	912345566665	098765432322	987654343333333	test9990@angleritech.com	Open	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9991	Test Acc9991	Test Job9991	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9991@angleritech.com	Contacted	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9992	Test Acc9992	Test Job9992	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9992@angleritech.com	Unqualified	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9993	Test Acc9993	Test Job9993	Advertisement	Financial	912345566665	098765432322	987654343333333	test9993@angleritech.com	Open	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9994	Test Acc9994	Test Job9994	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9994@angleritech.com	Unqualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9995	Test Acc9995	Test Job9995	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9995@angleritech.com	Unqualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9996	Test Acc9996	Test Job9996	Advertisement	Financial	912345566665	098765432322	987654343333333	test9996@angleritech.com	Unqualified	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9997	Test Acc9997	Test Job9997	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9997@angleritech.com	Open	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9998	Test Acc9998	Test Job9998	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9998@angleritech.com	Qualified	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9999	Test Acc9999	Test Job9999	Advertisement	Financial	912345566665	098765432322	987654343333333	test9999@angleritech.com	Unqualified	Cold	Mr. Admin	21-Apr-2006	

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Figure 51: Neglected Leads Report Page

The above report can be generated based on filtering the categories like View, Industry, Lead Source, Status, Rating and Activities not taken from the particular date also.

14.4.2. Leads by Source

This report displays the list of Name, Company, Job Title, Industry, Phone, Mobile, Fax, Email_id, Status, Rating, Lead Owner, Created Date and Last activity of Leads for the selected Lead Source. The Leads by Source Reports page is shown as Figure 52.

[Search](#)

Reports Leads by Source

Report Options

Lead Source	Industry	Status	Rating	View	Interval	Start Date	End Date
All Advertisement Direct Mailers Direct Sales Visit	All	All	All	All Leads	Created	Custom	

Show Graphical Report also.

Generating Report...

Report Summarized by Lead Source

Industry - All, Status - All, Rating - All, Leads - All Leads

Advertisement (3333 Records)

Name	Company	Job Title	Industry	Phone	Mobile	Fax	Email	Status	Rating	Lead Owner	Created Date	Last Activity
Mr. Test Lead9968	Test Acc9968	Test Job9968	Software	912345566665	098765432322	987654343333333	test9968@angleritech.com	Contacted	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9971	Test Acc9971	Test Job9971	Software	912345566665	098765432322	987654343333333	test9971@angleritech.com	Qualified	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9974	Test Acc9974	Test Job9974	Software	912345566665	098765432322	987654343333333	test9974@angleritech.com	Qualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9977	Test Acc9977	Test Job9977	Software	912345566665	098765432322	987654343333333	test9977@angleritech.com	Unqualified	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9980	Test Acc9980	Test Job9980	Software	912345566665	098765432322	987654343333333	test9980@angleritech.com	Contacted	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9983	Test Acc9983	Test Job9983	Software	912345566665	098765432322	987654343333333	test9983@angleritech.com	Contacted	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9986	Test Acc9986	Test Job9986	Software	912345566665	098765432322	987654343333333	test9986@angleritech.com	Qualified	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9989	Test Acc9989	Test Job9989	Software	912345566665	098765432322	987654343333333	test9989@angleritech.com	Contacted	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9992	Test Acc9992	Test Job9992	Software	912345566665	098765432322	987654343333333	test9992@angleritech.com	Unqualified	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9995	Test Acc9995	Test Job9995	Software	912345566665	098765432322	987654343333333	test9995@angleritech.com	Unqualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9998	Test Acc9998	Test Job9998	Software	912345566665	098765432322	987654343333333	test9998@angleritech.com	Qualified	Hot	Mr. Admin	21-Apr-2006	

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Figure 52: Leads by Source Report Page

The above report can be generated based on filtering the categories like Lead Source, Industry, Status, Rating, View, Interval and date also.

14.4.3. Leads by Status

This report displays the list of Name, Company, Job Title, Industry, Phone, Mobile, Fax, Email_id, Status, Rating, Lead Owner, Created Date and Last activity of Leads for the selected Lead Status. The Leads by Status Reports page is shown as Figure 53.

[Search](#)

Reports Leads by Status

Report Options

Status	Industry	Lead Source	Rating	View	Interval	Start Date	End Date
All Open Contacted Qualified Unqualified	All	All	All	All Leads	Created	Custom	

Show Graphical Report also.

Generated Report

Report Summarized by Status

Industry - All, Lead Source - All, Rating - All, Leads - All Leads

Open (2464 Records)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Rating	Lead Owner	Created Date	Last Activity
Mr. Test Lead9961	Test Acc9961	Test Job9961	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9961@angleritech.com	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9977	Test Acc9977	Test Job9977	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9977@angleritech.com	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9998	Test Acc9998	Test Job9998	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9998@angleritech.com	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9981	Test Acc9981	Test Job9981	Advertisement	Financial	912345566665	098765432322	987654343333333	test9981@angleritech.com	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9982	Test Acc9982	Test Job9982	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9982@angleritech.com	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9985	Test Acc9985	Test Job9985	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9985@angleritech.com	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9987	Test Acc9987	Test Job9987	Advertisement	Financial	912345566665	098765432322	987654343333333	test9987@angleritech.com	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9992	Test Acc9992	Test Job9992	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9992@angleritech.com	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9994	Test Acc9994	Test Job9994	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9994@angleritech.com	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9995	Test Acc9995	Test Job9995	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9995@angleritech.com	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9996	Test Acc9996	Test Job9996	Advertisement	Financial	912345566665	098765432322	987654343333333	test9996@angleritech.com	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9999	Test Acc9999	Test Job9999	Advertisement	Financial	912345566665	098765432322	987654343333333	test9999@angleritech.com	Cold	Mr. Admin	21-Apr-2006	

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Figure 53: Leads by Status Report Page

The above report can be generated based on filtering the categories like Lead Status, Industry, Lead Source, Rating, View, Interval and date also.

14.4.4. Leads by Users

This report displays the list of Name, Company, Job Title, Lead Source, Industry, Phone, Mobile, Fax, Email_id, Status, Rating, Created Date and Last activity of Leads for the selected Lead Users. The Leads by Users Reports page is shown as Figure 54.

[Search](#)

Reports Leads by User

Report Options

Users	Lead Source	Industry	Status	Rating	View	Interval	Start Date	End Date
<div style="border: 1px solid black; padding: 2px;"> Admin John Smith Robert Smith Sheila Jone </div>	All	All	All	All	All Leads	Created	Custom	

Show Graphical Report also.

Generated Report.

Report Summarized by Lead Owner

Lead Source - All, Industry - All, Status - All, Rating - All, Leads - All Leads

Admin (9997 Records)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Status	Rating	Created Date	Last Activity
Mr. Test Lead9993	Test Acc9993	Test Job9993	Advertisement	Financial	912345566665	098765432322	987654343333333	test9993@angleritech.com	Open	Warm	21-Apr-2006	
Mr. Test Lead9994	Test Acc9994	Test Job9994	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9994@angleritech.com	Unqualified	Inactive	21-Apr-2006	
Mr. Test Lead9995	Test Acc9995	Test Job9995	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9995@angleritech.com	Unqualified	Inactive	21-Apr-2006	
Mr. Test Lead9996	Test Acc9996	Test Job9996	Advertisement	Financial	912345566665	098765432322	987654343333333	test9996@angleritech.com	Unqualified	Hot	21-Apr-2006	
Mr. Test Lead9997	Test Acc9997	Test Job9997	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9997@angleritech.com	Open	Hot	21-Apr-2006	
Mr. Test Lead9998	Test Acc9998	Test Job9998	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9998@angleritech.com	Qualified	Hot	21-Apr-2006	
Mr. Test Lead9999	Test Acc9999	Test Job9999	Advertisement	Financial	912345566665	098765432322	987654343333333	test9999@angleritech.com	Unqualified	Cold	21-Apr-2006	

John Smith (0 Record)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Status	Rating	Created Date	Last Activity
No records matched.												

Robert Smith (0 Record)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Status	Rating	Created Date	Last Activity
No records matched.												

Sheila Jone (0 Record)

Name	Company	Job Title	Lead Source	Industry	Phone	Mobile	Fax	Email	Status	Rating	Created Date	Last Activity
No records matched.												

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Figure 54: Leads by Users Report Page

The above report can be generated based on filtering the categories like Users, Lead Source, Industry, Status, Rating, View, Interval and date also.

15. Logout

When you are finished working with ANGLER CONNECT, you should always log out of the system rather than just closing the web browser. When a user logs out, the application performs several 'clean-up' procedures like session management, and then automatically returns the web browser window to the Login screen.