# **ANGLER CONNECT**

**User Manual Document** 

Version 1.0

Developed By



full Service Provider of e-Business

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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.
- 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 <u>www.anglerconnect.com</u> 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.

🚰 ANGLER CRM - Microsoft Internet Explorer			_ (B)
Eile Edit View Favorites Iools Help			
↔ → → ③ ② ☆ Back Forward Stop Refresh Home	Search Favorites History Mail	Print Edit Discuss	s Research
Address 🚳 http://www.anglerconnect.com/login.php			▼ 🖓 Go Links
ANGLER CONNECT Customer Relationship Management			Full Service Provider of e-Business
ANGLER CRM	nt.		
	Empowering e-Business	by ANGLEH Technologies	

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 : a	dmin@angleritech.com
Old password :	
New password:	
Verify New password:	
Save	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.

Home Accounts Contacts Opportunities Activities [	s Leads Forecasts Reports	Setup Logout
Welcome Mr. Admin	Apr '06         3         'r (Apr - Jun) '06           Target         Achievem         get         Achievement           0         1999000         0         1999000	2 April 21, 2006
Search	Activities New 6 Due Date Activity Account / Company Contact	Select T 7
News	There are no Activi	ties.
Promotio 5 Useful Line		
» <u>Edit Messages &amp; Links</u>		
Home   Accour	ts   Contacts   Opportunities   Activities   Campaigns   Leads   Forecasts   Reports	
	Empowering é-Busi 8 IGLER Lechnologies	



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
- 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		
Accounts My Accounts			Accounts JSearch >
Account Name Al 💌	City All	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	9133333356456 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	<u> </u>	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.

Account Information:				
Account monilation.				
Created By:	Admin	Phone:		
Account Held by <sup>*</sup> :	Select Location 💌	Fax		
Account Owner <sup>*</sup> :	Admin 💌	Email:		
Account Name <sup>*</sup> :		Website:		
Account Alias Name: (Account Name to be display in Reports)		Ownership <sup>*</sup> :	Select	
Account Site:		Employees:		
Industry <sup>*</sup> :	Financial Professional Services Software	Category:	Select -	
Annual Turnover:				
Address Information:				
Street	×			
City:				
State:				
Zip / Postal Code:				
Country:	India			
Description:		×		
Products & Services:		×		
Whether Client? :				

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.

ccount 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		
ddress 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		

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.



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.

											Search												
Contacts My Cont	tacts														ſ	Accoun	lts	•			Se	arch∣∗	
Contact Name All 💌		Acco	unt Nai	me Al	•		Pho	ne				м	obile					Email					
Mr. Test Contact10		Test10	)				9133	913333356456 989898765544							test10@angleritech.com								
Mr. Test Contact100		Test10	)0				9133	333356	456			98	989876	5544				test100(	@anglei	ritech.co	m		
Mr. Test Contact1000		Test10	)00				9133	333356	456			98	989876	5544				test1000	)@angl	eritech.c	:om		
Mr. Test Contact1001		Test10	)01				9133	333356	456			98	989876	5544				test1001	1@angl	eritech.c	:om		
Mr. Test Contact1002		Test10	)02				9133	333356	456			98	989876	5544				test1002	2@angl	eritech.c	:om		
Mr. Test Contact1003		Test10	)03				9133	333356	456			98	989876	5544				test1000	3@angl	eritech.c	:om		
Mr. Test Contact1004		Test10	)04				9133	333356	456			98	989876	5544				test100/	4@angl	eritech.c	:om		
Mr. Test Contact1005		Test10	)05				9133	913333356456 989898765544						5544		test1005@angle					:om		
Mr. Test Contact1006		Test10	)06				9133	913333356456 989898765544							test1006@angleritech.com								
Mr. Test Contact1007		Test10	)07				9133	913333356456 989898765544						test1007@angleritech.com									
Mr. Test Contact1008		Test10	)08				9133	913333356456 989898765544						test1008@angleritech.com									
Mr. Test Contact1009		Test10	)09				9133	9133333356456 989898765544						test1009@angleritech.com									
Mr. Test Contact101		Test10	)1				9133	913333356456 989898765544						test101@angleritech.com									
Mr. Test Contact1010		Test10	)10				9133	9133333356456 989898765544						test1010@angleritech.com									
Mr. Test Contact1011		Test10	)11				9133	913333356456 989898765544							test1011@angleritech.com								
Mr. Test Contact1012		Test10	)12				9133	913333356456 989898765544						test1012@angleritech.com									
Mr. Test Contact1013		Test10	)13				9133	333356	456			98	989876	5544		test1013@angleritech.com							
Mr. Test Contact1014		Test10	)14				9133	333356	456			98	989876	5544				<u>test101/</u>	4@angl	eritech.c	:om		
Mr. Test Contact1015		Test10	)15				9133	333356	456			98	989876	5544	test1015@angleritech.com								
Mr. Test Contact1016		Test10	116				9133	333356	456	56 989898765544						test1016@angleritech.com							
Page 1 <u>2</u>	<u>3</u> <u>4</u>	<u>5</u>	<u>6</u>	2	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	
26 27	28 29	<u>30</u>	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	<u>50</u>	

Figure 9: Contact screen – default page

Searc

#### 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.

Contacts Add Contact					Acco
Contact Information:					
Created By: Admir	n			Birthdate:	8
Contact Owner <sup>*</sup> : Mr.Ac	dmin 💌			Phone <sup>*</sup> :	
Salutation: Mr.	•			Home Phone:	
First Name <sup>*</sup> :				Mobile:	]
Last Name:				Other Phone:	]
Contact Category: None	•	I		Fax:	j
Is a Decision Maker? : 🗖				Email:	]
Account <sup>*</sup> : Selec	ot 🔽			Assistant:	J
Job Title :				Asst. Phone:	
Address Information: Copy Add	ress Information				
Street:			*		
City:					
State:					
Zip / Postal Code:					
Country: India	•				
Description:			<u>×</u>		
Send Periodic Mailers: 🔲 E	lectronic Ion-electronic				
Private: 🕅					
	Save	Save & New	Reset	Back	

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 C	ontact1000		
Contact Information:			
Created By:	Admin	Phone:	9133333356456
Contact Owner:	Admin	Home Phone:	
Name:	Mr. Test Contact1000	Mobile:	989898765544
Contact Category:	Influencer	Other Phone:	
Is a Decision Maker? :	x	Fax:	9333333876987
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:	х		
	Edit De	lete 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.

ortunity Information:	
Created By : Admin	Lead Source <sup>*</sup> : Select
Opportunity Owner <sup>*</sup> : Admin 💌	Opportunity Value*:
Opportunity Name <sup>*</sup> :	Currency <sup>*</sup> : Select -
Opportunity Category <sup>*</sup> : Select	Expected Close Date <sup>*</sup> :
Opportunity Group: None 💌	Sales Stage <sup>*</sup> : Select 👤
Opportunity Type <sup>*</sup> : Select	Probability (%) <sup>*</sup> :
Account Name <sup>*</sup> : Select	Next Sales Stage: Select
Contact(s) :	Status <sup>*</sup> : Select
Description:	
Include for Forecast:	<u> </u>
Private:	
Save Save	e & New Reset Back

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.

Opport	unitie	es	Mv Opr	oortun	ities													I	Account	s	•			Se	arch≯
Opportun	iity Na	ame	Opportu All	nity Cal	tegory	Орро	rtunity	Group	Accou	int Name	e Ind All	ustry		•		S	ales SI All	age		Opp	portuni A	ty Value ▽	: () E1	kp. Clo ∆	se Date ▽
Test Oppor	rtunity"	<u>10</u>	Desktop			iexte	NSIONS	CRM	Test10		Prof	essional	Service	s		F	roposal	/ Price (	Juote	100	0		22	-Apr-20	)6
Test Oppor	rtunity"	100	Desktop			iEXTE	NSIONS	CRM	Test10	)	Prof	essional	l Service	s		F	Proposal	/ Price (	Juote	100	0		22	Apr-201	)6
Test Oppor	rtunity"	1000	Desktop			iEXTE	NSIONS	CRM	Test10	00	Prof	essional	Service	s		P	Proposal	/ Price (	Juote	100	0		22	Apr-200	)6
Test Oppor	rtunity"	1001	Web			BLUE	CRM		Test10	01	Soft	ware				N	legotiatio	on / Rev	view	100	0		22	Apr-201	)6
Test Oppor	rtunity"	1002	Wireless			CRM o	on the G	D	Test10	02	Fina	ncial				C	losed W	on		100	0		22	Apr-201	)6
Test Oppor	rtunity"	1003	Desktop			iEXTE	NSIONS	CRM	Test10	03	Prof	essional	l Service	s		C	losed Lo	ist		100	0		22	Apr-201	)6
Test Oppor	rtunity"	1004	Web			BLUE	CRM		Test10	04	Soft	ware				D	emo)			100	0		22	Apr-201	)6
Test Oppor	rtunity"	1005	Wireless			CRM o	in the G	D	Test10	05	Fina	ncial				F	Proposal	/ Price (	Juote	100	0		22	Apr-201	)6
Test Oppor	rtunity <sup>-</sup>	1006	Desktop			iEXTE	NSIONS	CRM	Test10	06	Prof	essional	l Service	s		N	legotiatio	on / Rev	view	100	0		22	Apr-201	)6
Test Oppor	rtunity <sup>-</sup>	1007	Web			BLUE	CRM		Test10	07	Soft	ware				C	losed W	on		100	0		22	Apr-201	)6
Test Oppor	rtunity"	008	Wireless			CRM o	in the G	D	Test10	08	Fina	ncial				C	losed Lo	ist		100	0		22	Apr-201	)6
Test Oppor	rtunity"	1009	Desktop			iEXTE	NSIONS	CRM	Test10	09	Prof	essional	Service	s		D	emo)			100	0		22	-Apr-20	)6
Test Oppor	rtunity"	101	Web			BLUE	CRM		Test10	1	Soft	ware				N	legotiatio	n / Rev	view	100	0		22	-Apr-20	)6
Test Oppor	rtunity"	1010	Web			BLUE	CRM		Test10	10	Soft	ware				P	Proposal	/ Price (	Juote	100	0		22	-Apr-20	)6
Test Oppor	rtunity"	1011	Wireless			CRM o	in the G	0	Test10	11	Fina	ncial				N	legotiatio	n / Rev	view	100	0		22	-Apr-20	)6
Test Oppor	rtunity"	1012	Desktop			iEXTE	NSIONS	CRM	Test10	12	Prof	essional	Service	s		C	losed W	on		100	0		22	-Apr-200	)6
Test Oppor	rtunity"	1013	Web			BLUE	CRM		Test10	13	Soft	ware				C	losed Lo	ist		100	0		22	-Apr-20	)6
Test Oppor	rtunity"	1014	Wireless			CRM o	in the G	D	Test10	14	Fina	ncial				D	emo)			100	0		22	-Apr-200	)6
Test Oppor	rtunity"	1015	Desktop			iEXTE	NSIONS	CRM	Test10	15	Prof	essional	Service	s		F	roposal	/ Price (	Juote	100	0		22	-Apr-20	)6
Test Oppor	rtunity"	1016	Web			BLUE	CRM		Test10	16	Soft	ware				N	legotiatio	n / Rev	view	100	0		22	-Apr-20	)6
Page	1	2	3	4	5	6	7	8	q	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
. ugo	26	_= 27	⊻ 28		30 ≚	≚ 21	÷ 32	22 22	.≍ 34	35	36	37	28	30	<u>10</u>	<u>10</u> /1	<u></u> 42	13	10	45	46	<u></u> 17	48	10	50
	<u></u>	<u>с</u> ,	<u>20</u> 50	<u>LJ</u>	<u>50</u> FF	<u>J1</u> FC	<u>JC</u> F7	<u>JJ</u> F0	<u>J7</u> F0	<u>55</u>	<u>50</u>	<u></u>	<u>50</u>	55	<u>-u</u> cr	-11	<u> 76</u> 67	<u></u> 	<u>רר</u> 00	70	71	70	<u>טר</u> 70	73	<u>30</u> 20
	<u>51</u>	<u>52</u>	<u>53</u>	<u>54</u>	<u>55</u>	<u>50</u>	<u>57</u>	<u>58</u>	<u>59</u>	<u>60</u>	<u>61</u>	<u>62</u>	<u>63</u>	<u>64</u>	<u>65</u>	<u>66</u>	<u>67</u>	<u>60</u>	<u>69</u>	<u>70</u>	<u>//</u>	12	<u>73</u>	<u>74</u>	<u>75</u>
									Figu	ire 14	l: M	y Op	oport	unity	y Sci	reen	l								

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:	×		
Private:	x		

EditDeleteBackFigure 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	1					
Activit	ies	My O	pen A	ctiviti	es													[	Accoun	ts	-			Se	arch⇒
Select	Today	1		-	ocatio	n: All		<b>.</b> u	Iser: A		Activity	Туре:	All			• G	o								
Due Da	te	Act	tivity T	уре			A	ccount	/ Comp	any			Contac	:t			Dpportu	inity							
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est3					Test Co	ntact3			Test Opp	ortunity	3						
22-Apr-2	006	Adn	ninistrati	on !			Te	est6					Test Co	ntact6			Test Opp	ortunity	6						
22-Apr-2	006	<u>Adr</u>	ninistrati	on !			Te	est9					Test Co	ntact9			Test Opp	ortunity!	Э						
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est12					Test Co	ntact12			Test Opp	ortunity	12						
22-Apr-2	006	Adn	ninistrati	on !			Te	est15					Test Co	ntact15			Test Opp	ortunity	ly15						
22-Apr-2	006	Adn	ninistrati	on !			Te	st18 st21 st24 st27 st30					Test Co	ntact18			Test Opp	ortunity	18						
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est21					Test Co	ntact21			Test Opp	ortunity	21						
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est24					Test Co	ntact24			Test Opp	ortunity	24						
22-Apr-2	006	Adn	ninistrati	on !			Te	est27					Test Co	ntact27			Test Opp	ortunity	27						
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est30					Test Co	ntact30			Test Opp	ortunity	30						
22-Apr-2	006	Adn	ninistrati	on !			Te	est33					Test Co	ntact33		Test Opportunity33									
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	Test36				Test Co	ntact36			Test Opp	ortunity	36							
22-Apr-2	006	<u>Adr</u>	ninistrati	on !			Te	Test39				Test Co	ntact39			Test Opp	ortunity	39							
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	Test42				Test Co	ntact42			Test Opp	ortunity	42							
22-Apr-2	006	Adn	ninistrati	on !			Te	est45					Test Co	ntact45			Test Opportunity45								
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est48					Test Co	ntact48			Test Opportunity48								
22-Apr-2	006	Adn	ninistrati	on !			Te	est51					Test Co	ntact51			Test Opp	ortunity!	51						
22-Apr-2	006	<u>Adn</u>	ninistrati	on !			Te	est54					Test Co	ntact54			Test Opp	ortunity!	54						
22-Apr-2	006	Adn	ninistrati	on !			Te	est57					Test Co	ntact57			Test Opp	ortunity!	57						
22-Apr-2	006	Adn	ninistrati	on !			Te	est60					Test Co	ntact60			Test Opp	ortunity	60						
Page	1	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	Z	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>
	<u>26</u>	<u>27</u>	<u>28</u>	<u>29</u>	<u>30</u>	<u>31</u>	<u>32</u>	<u>33</u>	<u>34</u>	<u>35</u>	<u>36</u>	<u>37</u>	<u>38</u>	<u>39</u>	<u>40</u>	<u>41</u>	<u>42</u>	<u>43</u>	<u>44</u>	<u>45</u>	<u>46</u>	<u>47</u>	<u>48</u>	<u>49</u>	<u>50</u>
	<u>51</u>	<u>52</u>	<u>53</u>	<u>54</u>	<u>55</u>	<u>56</u>	<u>57</u>	<u>58</u>	<u>59</u>	<u>60</u>	<u>61</u>	<u>62</u>	<u>63</u>	<u>64</u>	<u>65</u>	<u>66</u>	<u>67</u>	<u>68</u>	<u>69</u>	<u>70</u>	<u>71</u>	<u>72</u>	<u>73</u>	<u>74</u>	<u>75</u>
	<u>76</u>	<u>77</u>	<u>78</u>	<u>79</u>	<u>80</u>	<u>81</u>	<u>82</u>	<u>83</u>	<u>84</u>	<u>85</u>	<u>86</u>	<u>87</u>	<u>88</u>	<u>89</u>	<u>90</u>	<u>91</u>	<u>92</u>	<u>93</u>	<u>94</u>	<u>95</u>	<u>96</u>	<u>97</u>	<u>98</u>	<u>99</u>	<u>100</u>
	<u>101</u>	<u>102</u>	<u>103</u>	<u>104</u>	<u>105</u>	<u>106</u>	<u>107</u>	<u>108</u>	<u>109</u>	<u>110</u>	<u>111</u>	<u>112</u>	<u>113</u>	<u>114</u>	<u>115</u>	<u>116</u>	<u>117</u>	<u>118</u>	<u>119</u>	<u>120</u>	<u>121</u>	<u>122</u>	<u>123</u>	<u>124</u>	<u>125</u>
	<u>126</u>	<u>127</u>	<u>128</u>	<u>129</u>	<u>130</u>	<u>131</u>	<u>132</u>	<u>133</u>	<u>134</u>	<u>135</u>	<u>136</u>	<u>137</u>	<u>138</u>	<u>139</u>	<u>140</u>	<u>141</u>	<u>142</u>	<u>143</u>	<u>144</u>	<u>145</u>	<u>146</u>	<u>147</u>	<u>148</u>	<u>149</u>	<u>150</u>
	<u>151</u>	<u>152</u>	<u>153</u>	<u>154</u>	<u>155</u>	<u>156</u>	<u>157</u>	<u>158</u>	<u>159</u>	<u>160</u>	<u>161</u>	<u>162</u>	<u>163</u>	<u>164</u>	<u>165</u>	<u>166</u>	<u>167</u>	<u>168</u>	<u>169</u>	<u>170</u>	<u>171</u>	<u>172</u>	<u>173</u>	<u>174</u>	<u>175</u>
	<u>176</u>	<u>177</u>	<u>178</u>	<u>179</u>	<u>180</u>	<u>181</u>	<u>182</u>	<u>183</u>	<u>184</u>	<u>185</u>	<u>186</u>	<u>187</u>	<u>188</u>	<u>189</u>	<u>190</u>	<u>191</u>	<u>192</u>	<u>193</u>	<u>194</u>	<u>195</u>	<u>196</u>	<u>197</u>	<u>198</u>	<u>199</u>	<u>200</u>

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 Acti	vity			
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:	×		Start Time:	
Completed Date:			End Time:	
Next Activity:				
Next Activity Type:			Start Time:	
Due Date:				
Description:				
Manager's Remarks:				
Private:	×			
		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.

Activities Edit Activity	Searcl Accour
Assigned By: Admin	Priority <sup>*</sup> : High 💽
Assigned To": Admin 💌	Account
Activity Type *: Administration	Contact <sup>*</sup> :
Due Date <sup>*</sup> : 22-Apr-2006 😽	Opportunity: Test Opportunity3 💌
Completed:	Start Time: HH 💌 Hr : Min 💌 Min
Completed Date:	End Time: HH 💌 Hr : Min 💌 Min
Next Activity:	
Next Activity Type: Select	Start Time: HH 💌 Hr : Min 💌 Min
Due Date:	
Description	
Manager's Remarks:	
Send Notification E-mail	
Private:	
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 <sup>*</sup> :	Admin 💌		Account*	
Activity Type <sup>*</sup> :	Select	×	Contact <sup>*</sup> :	
Due Date <sup>*</sup> :		1	Opportunity: Select 💌	
Completed:			Start Time: HH 💌 Hr : Min 💌 Min	
Completed Date:		<b>1</b>	End Time: HH 💌 Hr : Min 💌 Min	
Next Activity:				
Next Activity Type:	Select	•	Start Time: HH 💌 Hr : Min 💌 Min	
Due Date:		1		
Description:		2	A	
Manager's Remarks:			A	
	Send Notification	E-mail		
Private:				
		Save Save & New	w 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.

	Search
Activities My Activity Log	Accounts 💽
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.



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.

									Search	1																	
Leads	My	Lead	ls															ſ	Accoun	ts	-			Se	arch∣⇒		
Lead N	ame 🗚	. 🗾	-		Comp	any Al	•			Pho	ne				м	obile					Email						
<u>Mr. Test</u>	Lead10				Test A	.cc10				9123	3455666	65			09	876543	2322				test10@	anglerit	igleritech.com				
Mr. Test	Lead10	D			Test A	.cc100				9123	3455666	65			09	876543	2322				test100	test100@angleritech.com					
<u>Mr. Test</u>	Lead10	<u>00</u>			Test A	cc1000				9123	3455666	65			09	1876543	2322		test1000@angleritech.c								
Mr. Test	Lead10	<u>D1</u>			Test A	.cc1001				9123	3455666	65			09	876543	2322				test100	1@angl	eritech.c	<u>m</u>			
Mr. Test	Lead10	<u>02</u>			Test A	cc1002				9123	3455666	65			09	1876543	2322				test100	est1002@angleritech.com					
Mr. Test	Lead10	<u>D3</u>			Test A	.cc1003				9123	3455666	65			09	876543	2322				test100	st1003@angleritech.com					
Mr. Test	Lead10	<u>D4</u>			Test A	cc1004				9123	3455666	665			09	1876543	2322				test100	4@angl	eritech.c	m			
Mr. Test	Lead10	<u>05</u>			Test A	.cc1005				9123	3455666	65			09	876543	2322				test1005@angleritech.com						
<u>Mr. Test</u>	Lead10	<u>06</u>			Test A	cc1006				912345566665 098765432322											test100	6@angl	m				
Mr. Test	Lead10	<u>07</u>			Test A	cc1007				9123	912345566665 098765432322									test100	7@angl	eritech.c	m				
Mr. Test	Lead10	<u>08</u>			Test A	cc1008				9123	3455666	665			09	1876543	2322				test100	8@angl	eritech.c	m			
Mr. Test	Lead10	<u>09</u>			Test A	.cc1009				9123	3455666	65			098765432322							9@angl	eritech.c	<u>m</u>			
Mr. Test	Lead10	1			Test A	cc101				9123	3455666	665			09	1876543	2322				test101@angleritech.com						
Mr. Test	Lead10	<u>10</u>			Test A	.cc1010				9123	3455666	65			09	1876543	2322				test1010@angleritech.com						
Mr. Test	Lead10	<u>11</u>			Test A	cc1011				9123	3455666	65			09	1876543	2322				test101	1@angl	eritech.c	m			
Mr. Test	Lead10	12			Test A	.cc1012				9123	3455666	65			09	876543	2322				test101	2@angl	eritech.c	om			
Mr. Test	Lead10	<u>13</u>			Test A	cc1013				9123	3455666	65			09	1876543	2322				test101	3@angl	eritech.c	m			
Mr. Test	Lead10	14			Test A	.cc1014				9123	3455666	65			09	1876543	2322				test101	4@angl	eritech.c	m			
Mr. Test	Lead10	15			Test A	cc1015				9123	3455666	65			09	1876543	2322				test101	5@angl	eritech.c	m			
<u>Mr. Test</u>	Lead10	<u>16</u>			Test A	.cc1016				9123	3455666	65			09	1876543	2322				<u>test101</u>	6@angl	eritech.c	<u></u>			
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	70	70	<u>55</u> 00	01	02	00	04	00 0E	00	07	00	01	00	01	07	00	0.4	0C	00	07	00	00	100		
	10	<u></u>	10	73	00	01	<u> UZ</u>	00	<u>04</u>	00	<u>00</u>	<u>07</u>	<u>00</u>	03	<u> 30</u>	31	37	33	<u> 34</u>	33	30	37	<u> 30</u>	22	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 wis	e					Accounts 💽	Search ⇒
Report Options								
Select Year Select Month Select	t Location S	elect User	Display					
2005-2006 💌 🗛ril 💌 🗚	<b>.</b> A	dl 🔽	Branch C	)nly 💽				
🛢 Generate Report 🛛 🖾 Exp	ort to Excel							
Generated Report.								📇 Print Report
Year - 2005 - 2006, Month - April, L	ocation - All,	User - Al	l, Displayi	ing - Branch (	) nly			
	Apri	1 2005	Marc	-b 2005	L Otr ( Apr 2	2005 - Jup 2005 J	IV Otr ( Jap 2	005 - Mar 2005 1
	Tat.	Acht.	Tat.	Acht.	Tat.	Acht.	Tat.	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 - Ne <del>w</del> york	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0
		Home   Acc	counts   <u>Cor</u>	ntacts   Opportur	<u>nities   Activities   Campa</u>	iigns   Leads   Forecasts   Repo	<u>arts</u>	

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.

Reports         Target vs Actual - Grou           Report Options         Select Year	up wi	se										r		
Report Options Select Year Select Month Select Loc										Account	ts 💌		Se	earch∣⇒
Select Year Select Month Select Loc	- <b>b</b> in -													
	auon	Select Us	er Display											
2005-2006 V All V All	•	All	Branch Or	ly 💌										
📋 Generate Report 🛛 🔣 Export to	о Ехс	el												
Generated Report.													📇 Print	Report
Year - 2005 - 2006, Month - All, Location	n - All,	User - All	, Displaying	- Branch Only										
Opportunity Category			Desktop			W	/eb			W	/ireless		Т	otal
Opportunity Group	N	one	iEXTEN	SIONS CRM	N	one	BLU	E CRM	N	one	CRM o	n the GO		All
	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.	Tgt.	Acht.
Total - Chicago	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
Total - New Jersey	0	0	0	0	0	0	0	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	n	0	0	n	n	0	0

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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.

Search

Reports Forecast vs.	Actual - P	eriod wise							Accoun	ts 💌		Search  +
Report Options												
Select Year Select Month	Select Loc	ation Select L	lser Displa	y								
2005-2006 • April •	All	- All -	Branc	h Only	•							
🗐 Generate Report 🛛 🔣	Export to	D Excel										
Generated Report.												rint Report
Year - 2005 - 2006, Month - a	April, Locati	on - All, User	- All, Displ	aying -	Branch Only							
		April 2005			March 200	)	լ նեւ (	Apr 2005 - Jun	2005 J	IV (	ltr ( Jan 2005 - Mai	2005 J
	Tgt.	Forecast.	Acht.	Tgt.	Forecast.	Acht.	Tgt.	Forecast.	Acht.	Tgt.	Forecast.	Acht.
Total - Bangalore	0	0	0	0	0	0	0	0	0	0	0	0
Total - Chennai	0	0	0	0	0	0	0	0	0	0	0	0
Total - Delhi	20000	0	0 (0%)	0	0	0	20000	0	0 (0%)	0	0	0
Total - Kolkata	0	0	0	0	0	0	0	0	0	0	0	0
Total - Mumbai	0	0	0	0	0	0	0	0	0	0	0	0
Total	20000	0	0 (0%)	0	0	0	20000	0	0 (0%)	0	0	0

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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.

															Sea	rch					
Reports Forecast	vs Ac	tual - Gr	oup v	vise											Acc	ounts	•			Sea	rch∣⇒
Report Options																					
Select Year Select Mo	onth S	elect Loca	tion S	elect	User Disp	lay															
2005-2006 💌 🗚	•	dl	•	XII 💌	Bran	nch Only	y	•													
🗐 Generate Report		Export to	Exce																		
Generated Report.																			E	B Print Re	port
Year - 2005 - 2006, Mont	th - All,	Location	- All, l	Jser -	All, Displa	aying -	Bran	ich Only													
Opportunity Categor	y		Des	ktor	)				w	eb					Wire	eless	;			Total	
Opportunity Group		None		iEX.	TENSIONS	6 CRM		None			BLUE CR	м		None		CF	RM on the	60		All	
	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.

Report Ontions	e necounts							
View	Account Category	Location	Industry	Ownership	Interval		Start Date	End Date
All Accounts	• All •	Chicago 💌	Professional Services 💌	Private 💌	Created 💌	Custom		•
🗐 Generate Rep	ort 🔣 Export to	Excel						
Generated Rep	ort.							📇 Print Repo
Active Accounts	(833 Records) Accou	nt Category - All	, Location - <mark>Chicago</mark> , Ir	ndustry - Profess	ional Services,	Ownership - Private, Accou	unts - All Acc	counts
Account Name	Account C	ategory	City	Accourt	t Owner	Created Date	L	.ast Activity
Fest9838			test city11	Mr. Admir	n	20-Apr-2006		
est9850			test city23	Mr. Admir	n	20-Apr-2006		
est9862			test city10	Mr. Admir	n	20-Apr-2006		
est9874			test city22	Mr. Admir	n	20-Apr-2006		
est9886			test city9	Mr. Admir	n	20-Apr-2006		
est9898			test city21	Mr. Admir	n	20-Apr-2006		
est9910			test city8	Mr. Admir	n	20-Apr-2006		
est9922			test city20	Mr. Admir	n	20-Apr-2006		
est9934			test city7	Mr. Admir	n	20-Apr-2006		
est994			test city17	Mr. Admir	n	20-Apr-2006		
fest9946			test city19	Mr. Admir	n	20-Apr-2006		
est9958			test city6	Mr. Admir	n	20-Apr-2006		
			test city18	Mr. Admir	n	20-Apr-2006		
est9970			test city5	Mr. Admir	n	20-Apr-2006		
Fest9970 Fest9982								

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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	
Reports Negleo	cted Accounts					Accounts	Search
Report Options							
View	Account Category Loc	ation Ind	lustry	Ownership	No Activity since		
All Accounts	All	s Angeles 💌 🏼 Pro	ofessional Services 💌	Private 💌		B	
📋 Generate Repor	t 🔣 Export to Exc	el					
Generated Repor	t.						📇 Print Report
Neglected Accourt	nts (833 Records) Acco	unt Category - 🗚	II, Location - Chicag	jo, Industry - Pr	ofessional Service	, Ownership - <mark>Private</mark> , Acc	ounts - All Accounts
Account Name	Account Categ	ory	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
			test citu9	Mr. Admin.		20.4-+ 2000	
Test9886			test cityo	Mr. Aumin		20-Apr-2006	Chicago
Test9886 Test9898			test city21	Mr. Admin		20-Apr-2006	Chicago Chicago
Test9886 Test9898 Test9910			test city21 test city8	Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922			test city21 test city8 test city20	Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934			test city21 test city21 test city8 test city20 test city7	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934 Test994			test city3 test city21 test city8 test city20 test city7 test city17	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934 Test994 Test9946			test city3 test city21 test city8 test city20 test city7 test city17 test city19	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934 Test994 Test9946 Test9958			test city21 test city21 test city20 test city20 test city17 test city19 test city19 test city6	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934 Test994 Test9946 Test9958 Test9970			test city21 test city21 test city20 test city20 test city7 test city17 test city19 test city18	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago
Test9886 Test9898 Test9910 Test9922 Test9934 Test9946 Test9958 Test9958 Test9970 Test9982			test city3 test city21 test city20 test city7 test city7 test city17 test city19 test city18 test city18 test city5	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin		20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006 20-Apr-2006	Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago Chicago 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		
Reports A	ccounts by User						Accounts 💽		Search 🗧
Report Optic	Ins								
Select User	Account Category	Location	Industry	Ownership	Interval		Start Date	End Date	
Admin John Smith Robert Smith Sheila Jone	Al 💌	All	All	All	Created	Custom	×	8	
∎ Generate I	Report 📓 Exp	ort to Excel							
Generated R	eport.							E P	rint Report
Report Summari	zed by Account Ow	ner							
Account Catego	ory - All, Location - A	All, Industry - A	II, Ownership - All						
Admin (9997	Records)								
Account Name	Account	Category	Industry		City	Ownership	Last Updated Date	Locati	on

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

Test9986	Softv	ware	test city9	Private	20-Apr-2006	Chicago
Test9987	Finar	ncial	test city10	Private	20-Apr-2006	New Jersey
Test9988	Profe	essional Services	test city11	Private	20-Apr-2006	New york
Test9989	Softv	ware	test city12	Private	20-Apr-2006	Los Angeles
Test999	Finar	ncial	test city22	Private	20-Apr-2006	New Jersey
Test9990	Finar	ncial	test city13	Private	20-Apr-2006	Chicago
Test9991	Profe	essional Services	test city14	Private	20-Apr-2006	New Jersey
Test9992	Softv	ware	test city15	Private	20-Apr-2006	New york
Test9993	Finar	ncial	test city16	Private	20-Apr-2006	Los Angeles
Test9994	Profe	essional Services	test city17	Private	20-Apr-2006	Chicago
Test9995	Softv	ware	test city18	Private	20-Apr-2006	New Jersey
Test9996	Finar	ncial	test city19	Private	20-Apr-2006	New york
Test9997	Profe	essional Services	test city20	Private	20-Apr-2006	Los Angeles
Test9998	Softv	ware	test city21	Private	20-Apr-2006	Chicago
Test9999	Finar	ncial	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     Accounts     Image: Contact Category       View     Location     Contact Category       All Contacts     Image: All Image: Contact Category       Image: Generate Report     Image: Export to Excel	Search >
Report Options         View       Location       Contact Category         All Contacts       Image: All Image	nt Report
View     Location     Contact Category       All Contacts     All     Image: All Image: Al	nt Report
All Contacts  All  All  All  All  All  All  All  Al	nt Report
Generate Report     K Export to Excel	nt Report
📋 Generate Report 🗧 🔯 Export to Excel	nt Report
	nt Report
	int Report
Generated Report.	
Mailing List (9997 Records) Contacts - All Contacts, Location - All, Contact Category - All	
Name Jah Tilla Diskdata Castast Categori Dione Mekilo Eau Email Street Citu Location State Deal	al Codo, Co
Name Jub Title bitrituate Contact Category Frione Mublie Fax Emain Street City Lucation State Fust	
Mr. Test         Top Mgmt         9133333356456         989898765544         9333333876987         test9990@angleritech.com         test         test         Chicago         test         6           Contact9990         Job9990         street9990         street9990         state9990         state	25 002
Mr. Test         Test         Executive / General         9133333356456         989898765544         933333876987         test991@angleritech.com         test         test         New         test         6           Contact9991         Job9991         Staff         Staff         street9991         city9991         Jersey         stafe991	25 002
Mr. Test Test Influencer 913333356456 989898765544 933333376987 test9992@angleritech.com test test New york test 6 Contact9992 Job9992 city9992 city9992 state9992	25 002
Mr. Test Test Technical 913333356456 989898765544 933333876987 test9993@angleritech.com test test Los test 6 Contact9993 Job9993	25 002
Mr. Test Test Top Mgmt 913333356456 989898765544 933333876987 test9994@angleritech.com test test Chicago test 6 Contact9994 Job9994	25 002
Mr. Test     Test     Executive / General     913333356456     989898765544     933333876987     test9995@angleritech.com     test     test     New     test     6       Contact9995     Job9995     Staff     St	25 002
Mr. Test Test Influencer 913333356456 989898765544 933333876987 test9996@angleritech.com test test New york test 6 Contact3996 Job9996 street3996 city9996 state3996	25 002
Mr. Test Test Contact3997 Job9997	25 002
Mr. Test Test Top Mgmt 913333356456 989898765544 933333876987 test9998@angleritech.com test test Chicago test 6 state9998 city9998 state9998	25 002
Mr. Test Test Executive / General 913333356456 989898765544 933333876987 test9999@angleritech.com test test New test 6 Contact9999 Job9999 Staff	25 002

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Figure 32: Mailing List Report Page

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 Ne	w Accounts							Accounts 💽	Search 🗧
Report Option	IS								
View .	Account Category	Location	Industry	0	wnership	Created since			
			,						
All Accounts		All	All	• A	All 💌		8		
📋 Generate R	eport 🔣 Export to	Excel							
Generated Re	port.								📇 Print Report
New Accounts	(9997 Records) Account	t Category - Al	I, Location - All,	Industry - /	All, Ownershi	p - All, Accounts	- All Accounts		
Account Name	Account Category	Indust	try	City	Acc	ount Owner	Ownership	Last Updated Date	Location
Test9984		Financi	ial	test cit	y7 Mr. A	dmin	Private	20-Apr-2006	New york
Test9985		Profess	ional Services	test cit	y8 Mr. A	dmin	Private	20-Apr-2006	Los Angeles
Test9986		Softwa	re	test cit	y9 Mr. A	dmin	Private	20-Apr-2006	Chicago
Test9987		Financi	ial	test cit	y10 Mr. A	dmin	Private	20-Apr-2006	New Jersey
Test9988		Profess	ional Services	test cit	y11 Mr. A	dmin	Private	20-Apr-2006	New york
Test9989		Softwa	re	test cit	y12 Mr. A	dmin	Private	20-Apr-2006	Los Angeles
Test999		Financi	ial	test cit	y22 Mr. 4	dmin	Private	20-Apr-2006	New Jersey
Test9990		Financi	ial	test cit	y13 Mr. A	dmin	Private	20-Apr-2006	Chicago
Test9991		Profess	ional Services	test cit	y14 Mr. A	dmin	Private	20-Apr-2006	New Jersey
Test9992		Softwa	re	test cit	y15 Mr. A	dmin	Private	20-Apr-2006	New york
Test9993		Financi	ial	test cit	y16 Mr. A	dmin	Private	20-Apr-2006	Los Angeles
Test9994		Profess	ional Services	test cit	y17 Mr. 4	dmin	Private	20-Apr-2006	Chicago
Tect9995		Softwa	re	test cit	y18 Mr. A	dmin	Private	20-Apr-2006	New Jersey
10303333				test oit	u19 Mr./	dmin	Private	20-Apr-2006	New york
Test9996		Financi	al	(ESC DI	y10 101.7				
Test9996 Test9997		Financi Profess	ial sional Services	test cit	y20 Mr. 4	dmin	Private	20-Apr-2006	Los Angeles
Test9996 Test9997 Test9998		Financ Profess Softwa	iai sional Services re	test cit test cit	y20 Mr. 4 y21 Mr. 4	.dmin .dmin	Private Private	20-Apr-2006 20-Apr-2006	Los Angeles Chicago

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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.

Reports Acco	unts by Industry								Accour	nts 💌		s	earch
Report Options													
Industry	Account Category	Location	View		Ownership	Interval				Start Date		End Date	
All Financial Professional Services Software		All	All Accounts	•	All	Created	<b>.</b> C.	ustom					
🗆 Show Graphica	al Report also.												
🗐 Generate Rep	ort 🔣 Export to	Excel											
Generated Rep	ort.											📇 Print Re	port
Report Summarized	by Industry												
Account Category -	All, Location - All, Own	nership - <mark>All</mark> , Ac	counts - All Acc	ounts									
Account Category -	All, Location - All, Ow	nership - <mark>All</mark> , Ad	counts - All Acc	ounts									
Account Category - Professional Se	All, Location - All, Own	nership - <mark>All</mark> , Ac	counts - All Acc	ounts									
Account Category - Professional Se Account Name	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac ;) ory	counts - All Acc	ounts	ount Owner	Own	nership	Las	t Updated D	ate	La	ocation	
Account Category - Professional Se Account Name Test9952	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac :) ory	City test city25	ounts Acco Mr. A	ount Owner dmin	<b>Owr</b> Priva	nership	Las 20.4	t Updated D .pr-2006	ate	La	ocation ew york	
Account Category - Professional Se Account Name Test3952 Test3955	All, Location - All, Owr rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac ;) ory	City test city25 test city3	Acco Mr. A Mr. A	o <b>unt Owner</b> dmin dmin	<mark>Own</mark> Priva Priva	nership ate	Las 20.4 20.4	t Updated D .pr-2006 .pr-2006	ate	Lo Ne Ne	ocation aw york aw Jersey	
Account Category - Professional Se Account Name Test9952 Test9955 Test9958	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac :) ory	City test city25 test city3 test city6	Acco Mr. A Mr. A Mr. A	o <b>unt Owner</b> dmin dmin dmin	Owr Priva Priva Priva	n <mark>ership</mark> ate ate ate	Las 20:4 20:4 20:4	t Updated D .pr-2006 .pr-2006 .pr-2006	ate	La Ne Ch	ocation wyork wyorky icago	
Account Category - Professional Se Account Name Test9952 Test9955 Test9958 Test9951	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac ;] ory	City test city25 test city3 test city6 test city9	Acco Mr. A Mr. A Mr. A Mr. A	b <b>unt Owner</b> dmin dmin dmin dmin	Owr Priva Priva Priva Priva	nership ate ate ate	Las 20.4 20.4 20.4 20.4 20.4	t Updated D .pr-2006 .pr-2006 .pr-2006 .pr-2006	ate	La Ne Ch Lo	o <mark>cation</mark> aw york aw Jersey iicago s Angeles	
Account Category - Professional Se Account Name Tes19952 Tes19955 Tes19956 Tes19964	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac :) ory	City test city25 test city25 test city6 test city6 test city9 test city12	Acco Mr. A Mr. A Mr. A Mr. A Mr. A	o <mark>unt Owner</mark> dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva	n <mark>ership</mark> ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006	ate	La Ne Ch Lo Ne	exation ew york ew Jersey licago is Angeles ew york	
Account Category - Professional Se Account Name Test9352 Test9355 Test9356 Test9361 Test9364 Test9367	All, Location - All, Own rvices (3332 Records Account Catego	nership - <mark>All</mark> , Ac	City test city25 test city25 test city3 test city6 test city9 test city12 test city15	Acco Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A	b <mark>unt Owner</mark> dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva	n <mark>ership</mark> ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Ne Ch Lo Ne	ication www.york www.Jersey iicago is Angeles www.york www.Jersey	
Account Category - Professional Se Account Name Tes19952 Tes19958 Tes19964 Tes1997	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city4 test city4 test city4 test city12 test city15 test city15 test city20	Acco Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A	punt Owner dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate	Las 20:4 20:4 20:4 20:4 20:4 20:4 20:4 20:4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Ne Ch Lo Ne Ne Lo	ecation wyyork wyyork wyyork s Angeles wyyork wyyork wyyork s Angeles	
Account Category - Professional Se Account Name Test9952 Test9958 Test9951 Test9961 Test9964 Test9970 Test9970	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city6 test city6 test city9 test city12 test city15 test city20 test city20 test city20	Acco Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A	o <mark>unt Owner</mark> dmin dmin dmin dmin dmin dmin dmin	Owr Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Ne Ch Lo Ne Lo Ch	ication wyork wyork wyork s Angeles wyork wyork wyork s Angeles icago	
Account Category - Professional Se Account Name Test9952 Test9955 Test9956 Test9956 Test9964 Test9977 Test9977 Test9973	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city6 test city9 test city12 test city12 test city12 test city15 test city20 test city18 test city18	Acco Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A	unt Owner dmin dmin dmin dmin dmin dmin dmin dmin	Owr Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006 .pr-2006	ate	La Ne Ch Lo Ne Lo Ch	exation ew york ew Jersey iicago s Angeles ew york ew Jersey s Angeles iicago s Angeles	
Account Category - Professional Se Account Name Tes19952 Tes19955 Tes19951 Tes19961 Tes19964 Tes19967 Tes19977 Tes19970 Tes19976	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city25 test city3 test city6 test city9 test city12 test city12 test city12 test city20 test city20 test city21 test city21 test city21	Acco Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A Mr. A	o <mark>unt Owner</mark> dmin dmin dmin dmin dmin dmin dmin dmin	Owr Prive Prive Prive Prive Prive Prive Prive Prive	nership ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	Lo Ne Ch Lo Ne Lo Ch Lo Ne	extion wyork wyork wyork s Angeles wyork wyork s Angeles iicago s Angeles s Angeles wyork	
Account Category - Professional Se Account Name Test9952 Test9955 Test9956 Test9961 Test9967 Test9977 Test9970 Test9973 Test9979	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city25 test city3 test city6 test city12 test city12 test city12 test city12 test city12 test city20 test city20 test city21 test city21 test city24 test city24	Acco Mr. A Mr. A	o <mark>unt Owner</mark> dmin dmin dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr2006 pr2006 pr2006 pr2006 pr2006 pr2006 pr2006 pr2006 pr2006 pr2006 pr2006	ate	Lo Ne Ch Lo Ne Lo Ch Lo Ne Ne	Intervention In	
Account Category - Professional Se Account Name Test9952 Test9955 Test9956 Test9967 Test9967 Test9977 Test9970 Test9977 Test9976 Test9979 Test9979 Test9979	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city3 test city6 test city6 test city12 test city12 test city12 test city15 test city20 test city18 test city21 test city24 test city24 test city24 test city24	Acco Mr. A Mr. A	sunt Owner dmin dmin dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Ne Ch Lo Ne Lo Ch Lo Ch Lo Ch	Intervention In	
Account Category - Professional Se Account Name Test9952 Test9955 Test9956 Test9961 Test9967 Test9977 Test9977 Test9977 Test9976 Test9976 Test9979 Test9979 Test9979 Test9979 Test9979	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city6 test city6 test city12 test city12 test city12 test city15 test city15 test city21 test city21 test city21 test city21 test city24 test city2 test city2 test city2 test city2 test city2	Acco Mr. A Mr. A	sunt Owner dmin dmin dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Nee Ch Lo Nee Lo Ch Lo Ch Lo Ch Lo Ch	eation w york w Jersey icago s Angeles w york w Jersey icago s Angeles w york w Jersey icago s Angeles	
Account Category - Professional Se Account Name Test9952 Test9958 Test9958 Test9961 Test9964 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9978 Test9982 Test9988	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city6 test city6 test city9 test city12 test city12 test city15 test city20 kest city18 test city21 test city21 test city24 test city24 test city24 test city24 test city24 test city24 test city24 test city24 test city24 test city64 test city86 test city87 test city87 test city87 test city86 test city87 test city87 test city87 test city87 test city86 test city87 test city86 test city87 test city86 test city87 test city86 test city86 tes	Acco Mr. A Mr. A	punt Owner dmin dmin dmin dmin dmin dmin dmin dmin	Owr Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Nee Ch Lo Nee Lo Ch Lo Nee Ch Lo Nee Ch	reation w york w Jersey icago s Angeles w york w Jersey icago s Angeles w york w Jersey icago s Angeles w york s Angeles w york	
Account Category - Professional Se Account Name Tes19952 Tes19955 Tes19956 Tes19964 Tes19964 Tes1997 Tes1997 Tes19970 Tes19970 Tes19975 Tes19975 Tes19975 Tes19975 Tes19975 Tes19975 Tes19975 Tes19982 Tes19988 Tes19988 Tes19981	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city3 test city6 test city6 test city12 test city12 test city12 test city12 test city20 test city21 test city20 test city20 test city20 test city21 test city20 test city21 test city20 test city21 test city20 test city21 test city21 test city20 test city21 test city20 test city21 test city21 test city21 test city21 test city21 test city24 test city21 test city44 test city12 test city12 test city24 test city14 test city14	OUNTS Mr. A. Mr. A.	ount Owner dmin dmin dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership ate ate ate ate ate ate ate ate ate ate	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Nee Ch Lo Nee Lo Ch Lo Nee Ch Lo Nee Nee Nee	ecation w york w Jersey icago s Angeles w york w Jersey icago s Angeles w york w Jersey icago s Angeles w york w Jersey icago	
Account Category - Professional Se Account Name Test9952 Test9955 Test9956 Test9964 Test9964 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9977 Test9979 Test9979 Test9979 Test9979 Test9979 Test9979 Test9979 Test99978 Test99978 Test99978 Test9998 Test9991 Test9991 Test9994	All, Location - All, Own rvices (3332 Records Account Catego	nership - All, Ac	City test city25 test city25 test city3 test city6 test city6 test city12 test city12 test city12 test city12 test city20 test city18 test city21 test city21 test city24 test city24 test city2 test city5 test city8 test city11 test city14 test city14	Accor Mr. A Mr. A	aunt Owner dmin dmin dmin dmin dmin dmin dmin dmin	Own Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva Priva	nership Nership Ne Ne Ne Ne Ne Ne Ne Ne Ne Ne Ne Ne Ne	Las 20.4 20.4 20.4 20.4 20.4 20.4 20.4 20.4	t Updated D pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006 pr-2006	ate	La Nee Ch Lo Nee Lo Ch Lo Ch Lo Ch Lo Nee Ch	ecation w york w Jersey icago s Angeles w york w Jersey s Angeles w york w Jersey icago s Angeles w york w Jersey icago	

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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.

					S	earch		
Benorts Accounts	s hy location				A	ccounts	•	Search >
Deports Accounts	s by Location							
Report Options		a 1:			o n .		<b>n</b> .	
Account Category Sele	ect Location Industry	Uwnership	Interval		Start Date	End	Date	
All •	Professional Ser Angeles w Jersey w york	vices	Created 💽 Cu	stom 💽			Ē	
🔲 Show Graphical Re	eport also.							
🗐 Generate Report	🔣 Export to Excel							
Generated Report.								📇 Print Report
Report Summarized by L	Location							
Account Category - All,	Industry - Professional Ser	vices, Ownership - All						
Chicago (833 Records	s)							
Account Name	City	Account Owner	Owr	ership La	st Updated Da	ite		Location
Test9814	test city12	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test982	test city5	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9826	test city24	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9838	test city11	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9850	test city23	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9862	test city10	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9874	test city22	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9886	test city9	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9898	test city21	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9910	test city8	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9922	test city20	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9934	test city7	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test994	test city17	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9946	test city19	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9958	test city6	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9970	test city18	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9982	test city5	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
Test9994	test citv17	Mr. Admin	Priva	te 20-	Apr-2006			Chicago
1 est3522 Test9934 Test9934 Test9946 Test9958 Test9950 Test9970 Test9992 Test9994	test city20 test city7 test city19 test city19 test city18 test city18 test city5 test city17	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	Priva Priva Priva Priva Priva Priva Priva	te 20, te 20, te 20, te 20, te 20, te 20, te 20, te 20, te 20,	арг-2006 Арг-2006 Арг-2006 Арг-2006 Арг-2006 Арг-2006 Арг-2006 Арг-2006			

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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	Орро	rtunities b	y Account								Accounts	•		Sear
Report O	ptions													
Accounts		Status	Opp. Catego	ry Sales Sta	ige	Opportuni	ties		Interval			Start Date	End	Date
fasd fasfereqae fdas fdsfas fsadfaffsdfa GaneAcc Govinda Acc	count	Al	Al	All	×	All Opportu	nities	•	Exp. Close Date 💌	Custom	×			
MuruganAco	araphica	l Report als	:0.											
🗐 Genera	ite Repo	ort 🖾 I	Export to Ex	cel										
Generated	l Report												昌 Print F	leport
Report Sum	marized	by Account	<u>s</u>											
Sales Stage	- All, Op	op. Status -	All, Opp. Ca	egory - All,	Opportunities -	All Opport	unities	2			T	<b>D</b>		
(3 Records	)										Type: N - Ne	W Business	E - Existing B	usiness
Opportunity	Status	Opp. Own	er Opp. Cat	Account	Location	Industry	Туре	Sales St	age Lead Source	Opp. Value ()	Exp. Amount	() Prob(%)	Exp. Close Da	ate Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualificati	on Lead Source Three	330000	33000	10	12-Apr-2006	25-Ap
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-A¢
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecti	ng Lead Source One	330000	16500	5	14-Apr-2006	25-Ar
Total Opp. \	√alue = 4	4090000 , E	xpected Amo	ount = 56400	00									
(3 Records)	)													
Opportunity	Status	Opp. Own	er Opp. Cat	Account	Location	Industry	Туре	Sales St	age Lead Source	Opp. Value ()	Exp. Amount	() Prob(%)	Exp. Close D.	ate Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualificati	on Lead Source Three	330000	33000	10	12-Apr-2006	25-A¢
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Ap
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecti	ng Lead Source One	330000	16500	5	14-Apr-2006	25-A¢
Total Opp. \	√alue = 4	4090000 , E	xpected Amo	ount = 56400	)0									
[3 Records]	)													
Opportunity	Status	Opp. Own	er Opp. Cat	Account	Location	Industry	Туре	Sales S	age Lead Source	Opp. Value ()	Exp. Amount	t () Prob(%)	Exp. Close D	ate Last
dsa	Warm	Mr. Admin	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualificati	on Lead Source Three	330000	33000	10	12-Apr-2006	25-Ap
fasfas	Warm	Mr. Admin	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-A¢
sdfa	Inactive	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecti	ng Lead Source One	330000	16500	5	14-Apr-2006	25-A¢

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												•		
Report Op	ptions													
Sales Stage	•	Location	Ind	lustry		Opp.	. Category	Opportunities		Interval			9	itart Date
All Prospecting Qualification Demo Needs Analy Id. Decision / Proposal / Pr Negotiation /	rsis Makers rice Quote / Review	All	▼ AI		T	AI	•	All Opportunities	×	Exp. Close Date	Custom		•	
🗆 Show G	☐ Show Graphical Report also.													
🗐 Generate Report 🛛 🖾 Export to Excel														
Generated	Report.													Print Report
Report Sumr	marized by Sa	ales Stage												
Location - A	<mark>ll, Industry</mark> - a	All, Opp. C	ategory - <mark>A</mark>	II, Opportunities	: - All Oppo	rtuniti	ies				Гуре: N - N	ew Busii	ness E-Exi	sting Business
Prospectir	ng (2 Record	ls)												
Opportunity	Opp. Owner	Opp. Cat	Account	Location	Industry 1	Гуре	Lead Sour	ce Opp. Value ()	Exp. Ar	nount () Prob(%)	Exp. Close	e Date L	.ast Updated	Last Activity
fasfa	Mr. srinivasan m	Multimedia	fsadfaffsdfa	COIMBATORE	Art E Industry2	E	Lead Source Three	9420000	171000	5	21-Apr-2006	6 2	5-Apr-2006	
sdfa	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art E Industry2	-	Lead Source One	330000	16500	5	14-Apr-2006	6 2	5-Apr-2006	
Total Opp. V	Jalua - 3750		cted Amou	pt - 197500										

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													
Report Options													
Opp. Category	Location	Sales Stage		Industry		Opportunities		Interval		:	Start Date		
All E-Biz Multimedia Products Web	All	]  AII	×	All		All Opportunities	T	Exp. Close Date	Custom				
🔲 Show Gra	phical Report als	0.											
🗐 Generate	⊜ Generate Report ⊠ Export to Excel												
Generated R	eport.									8	Print Report		
<u>Report Summa</u>	rized by Opportu	ity Category											
Location - All,	Sales Stage - <mark>All</mark>	Industry - All, C	) pportuniti	es - All Oppo	rtunities								
								Т	ype: N - New Bu	siness E - Exi	sting Business		
E-Biz (1 Reco	ord)												
Opportunity S	ales Stage Opp.	Owner Account	Location	Industry	Type Lead Sou	irce Opp. Value (	() Exp. An	nount () Prob(%)	Exp. Close Date	Last Update	d Last Activity		
fasfas D	emo Mr. Ac	min GaneAcc	ERODE	Automotive Industry3	E Lead Sourd Three	ce 3430000	514500	15	05-Apr-2006	25-Apr-2006			
Total Opp. Val	ue = 3430000 , E	xpected Amoun	t = 514500	)									



#### 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 O	ptions													
Sales Stage	e	Location	Ind	ustry		Opp. Category	Opportunities		Not Updated sin	се	No Activit	y since		
All Prospecting Qualification Demo Needs Analy Id. Decision Proposal / P Negotiation.	<mark>/sis</mark> Makers Yrice Quote / Review	All	▼ All			All	All Opportunities	×		<b>B</b>			<b>.</b>	
🗆 Show G	Graphical Re	port also.												
🗐 Genera	ite Report	🔣 Ехро	ort to Exce	el										
Generated	l Report.													Print Report
Report Sum	marized by S	ales Stage												
Location - A	II, Industry -	All, Opp. Ca	ategory - A	II, Opportur	nities - All Oppo	rtunities								
									T,	ype: N	- New Bu	siness E	- Exis	ting Business
Prospecti	ng (2 Record	ds)												
Opportunity	Opp. Owner	Opp. Cat	Account	Industry	Type Location	Lead Sou	rce Opp. Value ()	Ехр. Ал	ount () Prob(%)	Ехр. С	lose Date	Last Up	dated	Last Activity
fasfa	Mr. srinivasan m	Multimedia	fsadfaffsdfa	Art Industry2	E COIMBAT	ORE Lead Sourc Three	e 3420000	171000	5	21-Apr-	2006	25-Apr-20	)06	
sdfa	Mr. Admin	Multimedia	Govinda Account	Art Industry2	E COIMBAT	ORE Lead Sourc One	e 330000	16500	5	14-Apr-	2006	25-Apr-20	)06	
Total Opp. V	Value = 3750	000 , Expec	ted Amour	nt = 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 O	pportun	ities									Ac	counts	•
Report Op	otions													
View	Location		Industry		Acc. Catego	огу Орр.	Category	Opportun	ities	Interval				Start Dat
Closed Lost	► AI	•	All	•	All 🗸	All	•	All Opport	unities 💽	Exp. Close Date	e 🔽 🖂 Cua	stom	•	
🗆 Show G	raphical Rep	oort also.												
🗐 Genera	te Report	🕅 Ex	port to Ex	cel										
Generated	Report.											E	Print	Report
Report Sum	narized by Cl	osed Opp	ortunities											
Location - A	I, Account C	ategory -	All, Sales	Stage - <mark>All</mark> , Industry	, - <mark>All</mark> , Opp. (	Category	- All, Op	oortunities	- All Opportuni	ties				
										Туре	: N - Nev	Business E - E	kisting	Business
Closed Lo	st (O Record	)												
Opportunity	Opp. Owner	Opp. Ca	t Account	Account Category	Location In	dustry T	ype Lea	d Source (	Opp. Value () E	xp. Amount () F	Prob(%)	Exp. Close Date I	Last Uj	odated L
						N	o records	matched.						
Total Opp. V	'alue = 0 , E:	kpected /	Amount = 0											
Closed Wo	on (1 Record	ŋ												
Opportunity	Opp. Owner	Opp. Ca	t Account	Account Category	Location In	dustry	Type Le	ad Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last I	Jpdated
test	Mr. srinivasan m	E-Biz	GaneAcc		ERODE Au Inc	itomotive dustry3	E Lea On	ad Source e	200000000	20000000	100	21-Apr-2005	25-Apr	-2006
Total Opp. V	'alue = 2000	00000 , E	xpected A	mount = 20000000	)									
					_	_		<b>.</b> .						

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

Reports Opp	ortunities by Locatic	Search the Web			Acc	counts 💌	Search 🗧
Report Options	6						
Location	Sales Stage	Industry	Opp. Category	Interval		Start Date	End Date
AII BANGALORE CHENNAI COIMBATORE	All	All	All	Exp. Close Date 💌	Custom		<b>6</b>
ERODE MANGALORE SALEM							
🗌 Show Graphic	cal Report also.						
🗐 Generate Re	port 🔣 Export to I	Excel					
Generated Repo	ort.						📇 Print Report
Report Summarize	d by Location						
Industry - All, Opp.	. Category - <mark>All</mark> , Sales St	age - All					
					I	Type: N - New Busin	ess E - Existing Business
BANGALURE (I	J Recordj						
Opportunity Opp.	Owner Opp. Cat Accou	unt Industry Type Sales Sta	ge Lead Sourc	e Opp. Value () Ex	cp. Amount () Prob(%)	Exp. Close Date La	st Updated Last Activity
			No record	s matched.			
Total Opp. Value :	= 0 , Expected Amount =	0					
CHENNAI (0 Re	cord)						

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.

Reports	Opport	unities by l	Jser								Acc	counts	•		
Report C	ptions														
Users	L	ocation	Sales Sta	ge	In	dustry		Opp. Categor	y Interval			S	itart Date	•	1
abi abi Admin Ganesh Govinda Sv Murugan M raje sh srinivasan n xyz	vamy g ur n	All	All		•	JI		All 🔹	Exp. Close Date	Cus	stom	•		]	<b>ii</b> ]
🗆 Show	Graphical F	Report also.													
🗊 Genera	ate Report	Е 🔣 Ехр	ort to Excel										🗐 Pri	nt Repo	ort
Benort Sur	marized hy	Annortunity	Owner												
Location -	All. Industru	- All. Opp. C	ategory - All.	Sales Stag	- All										
										Ту	pe: N - New Busi	ness E	- Existin	g Busir	ness
Admin (3	Records)														
Opportunity	Opp. Cat	Account	Location	Industry	Туре	Sales Stage	Lead Source	Opp. Value ()	Exp. Amount ()	Prob(%)	Exp. Close Date	Last U	pdated	Last A	ctivi
dsa	Multimedia	MuruganAcc	ERODE	Art Industry2	N	Qualification	Lead Source Three	330000	33000	10	12-Apr-2006	25-Apr-	2006		
fasfas	E-Biz	GaneAcc	ERODE	Automotive Industry3	E	Demo	Lead Source Three	3430000	514500	15	05-Apr-2006	25-Apr-	2006		
sdfa	Multimedia	Govinda Account	COIMBATORE	Art Industry2	E	Prospecting	Lead Source One	330000	16500	5	14-Apr-2006	25-Apr-	2006		
Total Opp.	Value = 40	90000 , Expe	cted Amount	= 564000											
ANGL	ER Te	chnolo	aies Ind	ia Pvt	Ltd	- (	confiden	tial-				Pa	ae 38	3 of	49

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

#### 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													
Report Op	otions												
Opportunity	Type Loc	ation	Sales Stag	je	Industry			Opp. Catego	ry Opportuni	ties	Interval		
New Busines	s 💽 All	•	All	•	All		•	All 💌	All Opportu	nities 💽	Exp. Close Date 💌	Custom	
🗆 Show G	iraphical Re	port also.											
🗐 Generate Report 🛛 🔣 Export to Excel													
Generated	Report.											📇 Prin	t Report
Report Summ	narized by O	pportunity Ty	pe										
Location - A	II, Sales Sta	ge - <mark>All</mark> , Indus	try - <mark>All</mark> , Op	op. Category	All, Oppo	ortunities	- All Opportu	nities					
										Тур	e: N - New Busine:	ss E - Existing	Business
New Busin	iess (1 Red	ord)											
Opportunity	Sales Stage	e Opp. Owner	Opp. Cat	Account	Location	Industry	Lead Source	e Opp. Value	e () Exp. Amo	ount () Prob(%)	Exp. Close Date	Last Updated	Last Activ
dsa Qualification Mr. Admin Multimedia MuruganAcc ERODE Art Lead Source 330000 33000 10 12-Apr-2006 25-Apr-2006 Industry2 Three													
Total Opp. Value = 330000 , Expected Amount = 33000													
				Figu	e 43:	Орро	rtunities	s by Typ	e				

#### 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											
Report Options											
Industry	Location	Sales Stage	Opp. Category	Opportunities	Interval		Start Date				
All Agri & cultivation Industry1 Art Industry2 Automotive Industry3 Banking & Finance Industry4 Jewellers Industry6 Trade Fair & Events Industry 7	All	All	All	All Opportunities	Exp. Close Date 💌	Custom					
🔲 Show Graphical Report a	lso.										
🖹 Generate Report 🛛 🔣	Export to Excel										
Generated Report.						6	Print Report				
Report Summarized by Industry	2										
Location - All, Sales Stage - A	II, Opp. Category -	All, Opportunities - All O	pportunities								
					Тур	be: N - New Business E - E	xisting Business				
Agri & cultivation Industry	1 (0 Record)										
Opportunity Sales Stage Opp	. Owner Opp. Cal	Account Location Typ	be Lead Source	e Opp. Value () Exp. Am	ount () Prob(%) Ex	p. Close Date Last Update	d Last Activity				
			No records	matched.							
Total Opp. Value = 0 , Expect	ed 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	Opportur	nities by Sou	rce										Acc
Report O	ptions												
Lead Sourc	e L	ocation	Opp. Cat	egory Sales	Stage	Ind	ustry		Opportuniti	es	Interval		
All Lead Source Lead Source	e One e Three	xii 💌	All	▲ AI		▼ All			<ul> <li>All Opportun</li> </ul>	ities 💌	Exp. Close D	ate 💌 Custom	
🗆 Show 6	Graphical Re	port also.											
🗐 Genera	te Report	📧 Export	to Excel										Print Report
D i c	r Keport.												Fine Report
Heport Sum	marized by L	Ipportunity Sou	rce	_									
Location - A	II, Sales Sta	ge - All, Industi	ry - All, Op	p. Category	- All, Opportun	ities - A	ll Oppor	tunities		Tuna	M. Manu Dur	inese E. Evis	ting Dusinger
Lead Sou	rce One (2	Records)								туре	. N - New Du	Siness E - Exis	any business
Opportunity	Sales Stag	e Opp. Owner	Opp. Cat	Account	Location	Industr	y Type	Opp. Value ()	Exp. Amount ()	Prob(%) Exp	o. Close Date	Last Updated	Last Activity
sda	Qualification	Mr. abi abi	Web	MuruganAcc	ERODE	Art Industry	2 E	3430000	343000	10 074	\pr-2006	25-Apr-2006	
sdfa	Prospecting	Mr. Admin	Multimedia	Govinda Account	COIMBATORE	Art Industry:	2 E	330000	16500	5 144	Apr-2006	25-Apr-2006	
Total Opp. \	Value = 376	0000 , Expected	d 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 Oppo	rtunity History	/					Accounts 👤	Search  +
<b>Report Options</b>								
Accounts	Opportunities !	Sales Stage		S	tart Date	End Date		
GaneAcc 💌	All sss test fasfas	All 💌	Custom			8	- <b>1</b>	
Generate Report Generated Report	rt 🔣 Expo	ort to Excel						📇 Print Report
Report Summarized I	by Opportunity							
Account - Ganeáco	Sales Stage -	AII						
Account adminute,	Suice stuge P						Type: N - Nev	Business E - Existing Business
fasfas (1 Record),	Opp. Category -	E-Biz, Type - E, Lead S	ource - Lead Source	e Three				
Opp. Owner	Sales Stage	Opp. Value	Exp. Amont	Prob(%	) Exp. Cle	ose Date	Last Updated	Account Category
Mr. Admin	Demo	3430000	514500	15	05-Apr-20	006	25-Apr-2006	
sss (1 Record), Opp	o. Category - Mu	<mark>ultimedia, Type - E, Lea</mark> c	l Source - Lead Sour	rce One				
Opp. Owner	Sales Stage	Opp. Valu	e Exp. Amont	P	rob(%) Exp	). Close Date	Last Updated	Account Category
Mr. Ganesh 1	Negotiation / Revie	ew 120000	96000	80	) 24-4	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		
Reports Ac	tivities by Account					Accounts	-	Search >
Report Optio	ns							
Select Account	Activity Type	Status	Interval	Start Date	End Date			
Test10 Test100 Test1000 Test1002 Test1003 Test1004 Test1005	All	All	Custom 💌	]		8		
🗆 Show Grap	hical Report also.							
📋 Generate F	leport 🔣 Export (	to Excel						
Generated R	eport.							📇 Print Report
Report Summari	zed by Account							
Activity Type - A	II, Status - <mark>All</mark>							
Test10 (1 Rec	ord)					Status:	X - Not Con	npleted 🗸 - Completed
Due Date	Activity Type	Contact	Opportunity	Activity Owner	Start Time	End Time	Status	Completed Date
Test10 (1 Rec	ord)							
Due Date	Activity Type	Contact	Opportunity	Activity Owner	Start Time	End Time	Status	Completed Date
Due Date 22-Apr-2006	Activity Type Appointment Request	Contact Test Contact10	Opportunity Test Opportunity10	Activity Owner Admin	Start Time	End Time	Status X	Completed Date
Due Date 22:Apr-2006 Total Time = 0	Activity Type Appointment Request Hr 0 min	Contact Test Contact10	Opportunity Test Opportunity10	Activity Owner Admin	Start Time	End Time	Status X	Completed Date
Due Date 22:Apr-2006 Total Time = 0 Test100 (1 Re	Activity Type Appointment Request Hr 0 min cord)	Contact Test Contact10	Opportunity Test Opportunity10	Activity Owner Admin	Start Time	End Time	Status X	Completed Date
Due Date 22:Apr-2006 Total Time = 0 Test100 (1 Re Due Date	Activity Type Appointment Request Hr 0 min cord) Activity Type	Contact Test Contact10 Contact	Opportunity Test Opportunity10 Opportunity	Activity Owner Admin	Start Time	End Time	Status X Status	Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006	Activity Type Appointment Request Hr 0 min cord) Activity Type Appointment Request	Contact Test Contact10 Contact Test Contact100	Opportunity Test Opportunity10 Opportunity Test Opportunity100	Activity Owner Admin Activity Owner Activity Owner Activity Owner	Start Time	End Time	Status X Status X	Completed Date
Due Date           22:Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22:Apr-2006           Total Time = 0	Activity Type Appointment Request Hr 0 min cord) Activity Type Appointment Request Hr 0 min	Contact Test Contact10 Contact Test Contact100	Opportunity Test Opportunity10 Opportunity Test Opportunity100	Activity Owner Admin Activity Owner Admin	Start Time	End Time	Status X Status X Status X	Completed Date
Due Date           22:Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22:Apr-2006           Total Time = 0           Total Time = 0           Total Time = 0           Test1000 (1 Re	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Record)	Contact Test Contact10 Contact Test Contact100	Opportunity Test Opportunity10 Opportunity Test Opportunity100	Activity Owner Admin Activity Owner Admin	Start Time	End Time	Status X Status X	Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006           Total Time = 0           Total Time = 0           Test1000 (1 Fe           Due Date	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Record) Activity Type	Contact Test Contact10 Contact Test Contact100	Opportunity Test Opportunity10 Opportunity Test Opportunity100	Activity Owner Admin Activity Owner Admin Activity Owner Admin	Start Time Start Time Start Time	End Time End Time End Time	Status X Status X Status X Status	Completed Date Completed Date Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006           Total Time = 0           Test1000 (1 F           Due Date           22-Apr-2006           Total Time = 0           Due Date           22-Apr-2006           Test1000 (1 F           Due Date           22-Apr-2006	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Record) Activity Type Appointment Request	Contact Test Contact10 Contact Test Contact100 Contact Test Contact1000	Opportunity       Test Opportunity10       Opportunity       Test Opportunity100       Opportunity       Test Opportunity100	Activity Owner Admin Activity Owner Admin Activity Owner Admin Activity Owner Admin	Start Time Start Time Start Time	End Time End Time End Time	Status X Status X Status X Status X	Completed Date Completed Date Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006           Total Time = 0           Test1000 (1 F           Due Date           22-Apr-2006           Total Time = 0           Due Date           22-Apr-2006           Total Time = 0	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Activity Type Appointment Request Hr 0 min	Contact Test Contact10 Contact Test Contact100 Contact Test Contact1000	Opportunity         Test Opportunity10         Opportunity         Test Opportunity100         Opportunity         Test Opportunity100	Activity Owner Admin Activity Owner Admin Activity Owner Admin Activity Owner Admin	Start Time Start Time Start Time	End Time End Time End Time	Status X Status X Status X Status X	Completed Date Completed Date Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006           Total Time = 0           Test1000 (1 F           Due Date           22-Apr-2006           Total Time = 0           Due Date           22-Apr-2006           Total Time = 0	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Activity Type Appointment Request Hr 0 min	Contact Test Contact10 Contact Test Contact100 Contact Test Contact100	Opportunity         Test Opportunity10         Opportunity         Test Opportunity100         Opportunity         Test Opportunity100	Activity Owner Admin Activity Owner Admin Activity Owner Admin Activity Owner Admin	Start Time Start Time Start Time	End Time End Time End Time	Status X Status X Status X Status X	Completed Date Completed Date Completed Date
Due Date           22-Apr-2006           Total Time = 0           Test100 (1 Re           Due Date           22-Apr-2006           Total Time = 0           Test1000 (1 F           Due Date           22-Apr-2006           Total Time = 0           Total Time = 0	Activity Type Appointment Request Hr 0 min Cord) Activity Type Appointment Request Hr 0 min Activity Type Appointment Request Hr 0 min	Contact Test Contact10 Contact Test Contact100 Contact Test Contact1000	Opportunity         Test Opportunity10         Opportunity         Test Opportunity100         Opportunity         Test Opportunity100	Activity Owner Admin Activity Owner Admin Activity Owner Admin Activity Owner Admin	Start Time Start Time Start Time	End Time End Time End Time	Status X Status X Status X Status X Status X	Completed Date Completed Date Completed Date

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 Activit	ties by Lead				Accounts	Search 🗧
Report Options						
Select Lead	Activity Type	Status	Interval	Start Date	End Date	
Test Lead10 - Test Ac Test Lead100 - Test A Test Lead1000 - Test A Test Lead1000 - Test A Test Lead1002 - Test A Test Lead1003 - Test A Test Lead1004 - Test A	210 ▲ All 2c1000 Acc1000 Acc1000 Acc10002 Acc1003 Acc1003 Acc1005 ▼	I AII	Custom		8	- <del>8</del>
🗌 Show Graphical	Report also.					
🗐 Generate Repo	rt 🔣 Export to Excel	•				
Generated Repo	rt.					📇 Print Report
Report Summarized L	ov Leads					
Activity Type - All, S	tatus - All					
Test lead 10 Te	at Apol 0 (0 Decend)				Status	:: X - Not Completed 🖌 - Completed
Test Leadin - Te	STACCTO (O Record)					
Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
Test Lead1441 -	Test Acc1441 (0 Record)					
Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
			No records match	ed.		
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 match	ed.		
lotal lime = U Hr U	min					
Test Lead1443 -	Test Acc1443 (0 Record)					
Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
T-1-1 T 0.11-0	_•		No records match	ed.		
i otal i ime = U Hr U	min					
Test Lead1444 -	Test Acc1444 (0 Record)					
Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
Total Time = 0 Hr 0	min		No records match	ed.		
	T 14 1445 (0 5					
Test Lead 1445 -	Test Acc1445 (U Record)					
Due Date	Activity Type	Activity Owner	Start Time	End Time	Status	Completed Date
Total Time = 0 Hr 0	min		No records match	ed.		

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.

Reports     Ad       Report Option     Accounts     0       Test10     Image: Additional statement of the stateme	ctivities by Oppo ons portunities	Activity Type	Status	Interval		Accoun	ts 💌	Search 🗧												
Report Option Accounts O Test10 • A	ons pportunities All Fest Opportunity10	Activity Type	Status	Interval																
Accounts 0	pportunities	Activity Type	Status	Interval		Report Options														
Test10 🔹 🛛	All Test Opportunity10			incorrer	Start Date	End Dat	e													
		A⊪	All	Custom 💆		8														
Show Grap	ohical Report also.																			
📋 Generate F	圓 Generate Report																			
Generated R	leport.							📇 Print Report												
Report Summari	ized by Opportunity																			
Account - Test1	IO, Activity Type - A	II, Status - All																		
						Stat	us: X - Not	Completed 🗸 - Completed												
Test Opportu	inity10 (1 Record)																			
Due Date	Activity Type	Contac	ct Activ	vity Owner Start	Time End	Time	Status	Completed Date												
22-Apr-2006	Appointment Requ	iest Test Co	ntact10 Admir	n			x													
Total Time = 0 I	Hr O min																			
	Home   Accounts   Contacts   Opportunities   Activities   Campaigns   Leads   Forecasts   Reports																			

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		
Reports	Activities by User							Accounts	•	Search +
Report Opt	ions									
Select User	Activity Type	Status	Interval	Star	Date	End Dat	e			
Admin			Custom	_	¥	8		1		
John Smith Robert Smith Sheila Jone			Custon				~			
🗖 Show Gr	aphical Report also.									
🗐 Generate	e Report 🔣 Exp	ort to Excel								
Generated	Report.									📇 Print Report
Report Summa	arized by User									
Activity Type	- All, Status - All									
								Status:	X - Not	Completed 🗸 - Completed
John Smith	(0 Record)									
Due Date	Activity Type	Account/Company	Contact	Opportunit	y Sta	rt Time	End T	ime S	tatus	Completed Date
			Nor	ecords matcl	ned.					
Total Time =	0 Hr 0 min									
Robert Smi	th (2 Records)									
Due Date	Activity Type	Account/Company	Contact	Opportu	inity	Star	Time	End Time	Statu	s Completed Date
02-May-2006	Administration	Test1452	Test Contact1452	Test Opp	ortunity1452				х	
28-Apr-2006	Administration	Test1452	Test Contact1452	Test Opp	ortunity1452				х	
Total Time =	0 Hr 0 min									
Sheila Jone	e (0 Record)									
Due Date	Activity Type	Account/Company	Contact	Opportunit	y Sta	rt Time	End Ti	me S	tatus	Completed Date
			Nor	ecords matc	ned.			1		,
Total Time =	0 Hr 0 min									
		Home Account	ts   <u>Contacts</u>   <u>Opportunit</u>	ies   <u>Activities</u>   ]	Campaigns   Lea	ads   Forecas	ts   <u>Reports</u>			
			Empowering e-Bu	siness hu ANGI	EB Technologi	25				

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.

									Search					
Report	s Negl	ected Le	eads						Account	· 8	]	Search 🗧		
Report	Options													
View		Industry		Lead Sourc	e Statu:	s Ratin	g No Activity	since						
All Leads	•	All	•	All	- All	- All	•							
📋 Gene	erate Rep	ort 🖾	Export to E	хсеl										
Genera	ted Repo	ort.										📇 Print Report		
Neglect	ed Lead	s (9997 R	ecords)											
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		

Home | Accounts | Contacts | Opportunities | Activities | Campaigns | Leads | Forecasts | Reports Empowering e-Business by ANGLER Technologies

#### 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.

										Sear	ch		
Reports	Leads by	y Source								Acco	unts 💌		Search 🗧
Report O	ptions												
Lead Sourc	ce Inde	ustry	ę	itatus I	Rating V	iew	Interval			9	itart Date	End Date	
All Advertiseme Direct Mailer Direct Sales	ent rs : Visit			Ali 💽	All 💽 🖡	All Leads 🔹	Created	Custom		•		8	
, Show (	Graphical Re	eport also.											
🗐 Genera	ate Report	🔣 Ехр	ort to Ex	cel									
Generatin	ng Report.												Print Report
Report Sum	marized by L	ead Source	2										
Industry - A	II, Status - A	II, Rating	All, Lead:	s - All Leads									
Advertise	ment (3333	Records)											
Name	Company	Job Title	Industry	Phone	Mobile	Fax	Email		Status	Rating	Lead Owner	r Created Date	Last Activity
Mr. Test Lead9968	Test Acc9968	Test Job9968	Software	912345566665	09876543232	2 98765434333333	3 <u>test9968@</u> a	angleritech.com	Contacted	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9971	Test Acc9971	Test Job9971	Software	912345566665	09876543232	2 98765434333333	3 <u>test9971@</u> a	angleritech.com	Qualified	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9974	Test Acc9974	Test Job9974	Software	912345566665	09876543232	2 98765434333333	3 <u>test9974@a</u>	angleritech.com	Qualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9977	Test Acc9977	Test Job9977	Software	912345566665	09876543232	2 98765434333333	3 <u>test9977@</u> a	angleritech.com	Unqualified	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead998	Test Acc998	Test Job998	Software	912345566665	09876543232	2 98765434333333	3 <u>test998@ar</u>	ngleritech.com	Unqualified	Hot	Mr. Admin	21-Apr-2006	
Mr. Test Lead9980	Test Acc9980	Test Job9980	Software	912345566665	09876543232	2 98765434333333	3 <u>test9980@</u> a	angleritech.com	Contacted	Warm	Mr. Admin	21-Apr-2006	
Mr. Test Lead9983	Test Acc9983	Test Job9983	Software	912345566665	09876543232	2 98765434333333	3 <u>test9983@</u> a	angleritech.com	Contacted	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9986	Test Acc9986	Test Job9986	Software	912345566665	09876543232	2 98765434333333	3 <u>test9986@a</u>	angleritech.com	Qualified	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9989	Test Acc9989	Test Job9989	Software	912345566665	09876543232	2 98765434333333	3 <u>test9989@a</u>	angleritech.com	Contacted	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9992	Test Acc9992	Test Job9992	Software	912345566665	09876543232	2 98765434333333	3 <u>test9992@a</u>	angleritech.com	Unqualified	Cold	Mr. Admin	21-Apr-2006	
Mr. Test Lead9995	Test Acc9995	Test Job9995	Software	912345566665	09876543232	2 98765434333333	3 <u>test9995@a</u>	angleritech.com	Unqualified	Inactive	Mr. Admin	21-Apr-2006	
Mr. Test Lead9998	Test Acc9998	Test Job9998	Software	912345566665	09876543232	2 98765434333333	3 <u>test9998@</u> a	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.

									Sear	ch					
Report	s Lead	s by Stat	us						Acco	unts 💽		Search 🗧			
Report	Options														
Status	Indu	istry		Lead Source	Rating	View	Interval		9	Start Date	End Date				
All Open Contacter Qualified Unqualifie	all		•	All	r All 💌	All Leads	Created	Custom			] 😽 [	•			
🗌 Show	□ Show Graphical Report also.														
Genera	ted Repo	ort.										Print Report			
Report Su Industry -	ummarized All, Lead	<u>by Status</u> Source - A	II, Rating	- All, Leads - Al	l Leads										
Open (2	464 Recor	ds)													
Name	Company	Job Title	Lead Sc	urce Industry	Phone	Mobile	Fax	Email	Rating	Lead Owner	r Created Date	Last Activity			
Mr. Test	Test	Test	Direct Mr.	lere Drefessional	010045500005	000705400000	00705404000000								
Lead9961	Acc9961	Job9961	Directime	Services	312343366663	030703432322	367634343333333	test9961@angleritech.com	Inactive	Mr. Admin	21-Apr-2006				
Lead9961 Mr. Test Lead9977	Acc9961 Test Acc9977	Job9961 Test Job9977	Direct Sa Visit	es Software	912345566665	098765432322	987654343333333 9876543433333333	test9951@angleritech.com test9977@angleritech.com	Inactive Warm	Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead998	Acc9961 Test Acc9977 Test Acc998	Job9961 Test Job9977 Test Job998	Direct Sa Visit Direct Sa Visit	es Software	912345566665 912345566665	098765432322 098765432322	987654343333333 987654343333333 987654343333333	test9957@angleritech.com test9977@angleritech.com test998@angleritech.com	Inactive Warm Hot	Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead998 Mr. Test Lead9981	Acc9961 Test Acc9977 Test Acc998 Test Acc9981	Job9961 Test Job9977 Test Job998 Test Job9981	Direct Ma Visit Direct Sa Visit Advertise	es Software nent Financial	912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322	987654343333333 987654343333333 987654343333333 987654343333333	test9951@angleritech.com test9977@angleritech.com test998@angleritech.com test9981@angleritech.com	Inactive Warm Hot Cold	Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead998 Mr. Test Lead9981 Mr. Test Lead9982	Acc9961 Test Acc9977 Test Acc998 Test Acc9981 Test Acc9982	Job9961 Test Job9977 Test Job998 Test Job9981 Test Job9982	Direct Ma Visit Direct Sa Visit Advertise Direct Ma	es Software es Software nent Financial Services	912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322	987654343333333 987654343333333 987654343333333 987654343333333 987654343333333	test9951@angleritech.com test9977@angleritech.com test9988@angleritech.com test9981@angleritech.com test9982@angleritech.com	Inactive Warm Hot Cold Cold	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead998 Mr. Test Lead9981 Mr. Test Lead9982 Mr. Test Lead9985	Acc9961 Test Acc9977 Test Acc998 Test Acc9981 Test Acc9982 Test Acc9985	Job9961 Test Job9977 Test Job998 Test Job9981 Test Job9982 Test Job9985	Direct Ma Visit Direct Sa Visit Advertise Direct Ma Direct Ma	es Software es Software ment Financial illers Professional Services	912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322	987654343333333 987654343333333 987654343333333 987654343333333 987654343333333 987654343333333	test9951@angleritech.com test9997@angleritech.com test998@angleritech.com test9981@angleritech.com test9982@angleritech.com test9985@angleritech.com	Inactive Warm Hot Cold Cold Inactive	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead9980 Mr. Test Lead9982 Mr. Test Lead9985 Mr. Test Lead9987	Acc9961 Test Acc9977 Test Acc998 Test Acc9981 Test Acc9982 Test Acc9985 Test Acc9985	Job9961 Job9961 Job9977 Test Job998 Test Job9981 Test Job9982 Test Job9985 Test Job9987	Direct Ma Visit Direct Sa Visit Advertise Direct Ma Direct Ma Advertise	services software es Software ment Financial ilers Professional Services ment Financial	312345566665 312345566665 312345566665 312345566665 312345566665 312345566665 312345566665	096765432322 096765432322 096765432322 096765432322 096765432322 096765432322 096765432322	98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333	test9951@angleritech.com test9977@angleritech.com test998@angleritech.com test9981@angleritech.com test9982@angleritech.com test9985@angleritech.com	Inactive Warm Hot Cold Inactive Hot	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead9980 Mr. Test Lead9981 Mr. Test Lead9982 Mr. Test Lead9982 Mr. Test Lead9987 Mr. Test Lead9987 Mr. Test Lead9982	Acc9961 Test Acc9977 Test Acc9981 Test Acc9981 Test Acc9982 Test Acc9985 Test Acc9987 Test Acc9987	Test Job9981 Test Job9977 Test Job998 Test Job9982 Test Job9985 Test Job9985 Test Job9987 Test Job9987 Test Job9987	Direct Ma Visit Direct Sa Visit Advertise Direct Ma Advertise Direct Sa Visit	services software es Software ment Financial ilers Professional Services ment Financial services ent Financial	912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322	98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 987654343333333 987654343333333 987654343333333	test9951@angleritech.com test9997@angleritech.com test998@angleritech.com test9982@angleritech.com test9985@angleritech.com test9985@angleritech.com test9992@angleritech.com	Inactive Warm Hot Cold Inactive Hot Cold	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead9977 Mr. Test Lead9980 Mr. Test Lead9981 Mr. Test Lead9985 Mr. Test Lead9985 Mr. Test Lead9982 Mr. Test Lead9922 Mr. Test Lead9932 Mr. Test Lead9934	Acc9961 Test Acc997 Test Acc998 Test Acc9980 Test Acc9985 Test Acc9987 Test Acc9987 Test Acc9982 Test Acc9982 Test Acc9982	Test Job9961 Test Job9977 Test Job9981 Test Job9982 Test Job9985 Test Job9987 Test Job9987 Test Job9987 Test Job9994	Direct Ma Direct Sa Visit Direct Sa Visit Advertise Direct Ma Advertise Direct Sa Visit Direct Sa Visit	services software es Software nent Financial ilers Professional Services nent Financial es Software es Software ilers Professional	912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322	98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333	test9951@angleritech.com test9997@angleritech.com test9987@angleritech.com test9982@angleritech.com test9985@angleritech.com test9987@angleritech.com test9992@angleritech.com	Inactive Warm Hot Cold Inactive Hot Cold Inactive	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead937 Mr. Test Lead938 Mr. Test Lead9382 Mr. Test Lead9932 Mr. Test Lead9932 Mr. Test Lead9932 Mr. Test Lead99392 Mr. Test Lead9992	Acc9961 Test Acc9977 Test Acc998 Test Acc9982 Test Acc9985 Test Acc9997 Test Acc9992 Test Acc9994 Test Acc9994 Test Acc995	Test           Job9961           Test           Job998           Test           Job998           Test           Job998           Test           Job998           Test           Job998           Test           Job9982           Test           Job9982           Test           Job9987           Test           Job9992           Test           Job9992           Test           Job9994           Job9995	Direct Ma Direct Sa Visit Advertise Direct Ma Direct Ma Advertise Direct Sa Visit Direct Sa Visit	services software es Software ment Financial ilers Professional Services ment Financial es Software ilers Professional Services es Software services	912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322	98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333	test9951@angleritech.com test9997@angleritech.com test998@angleritech.com test9982@angleritech.com test9982@angleritech.com test9982@angleritech.com test9992@angleritech.com test9992@angleritech.com	Inactive Warm Hot Cold Inactive Hot Cold Inactive Inactive	Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006				
Lead9961 Mr. Test Lead997 Mr. Test Lead9980 Mr. Test Lead9981 Mr. Test Lead9982 Mr. Test Lead9982 Mr. Test Lead9982 Mr. Test Lead9992 Mr. Test Lead9992 Mr. Test Lead99995 Mr. Test Lead9995	Acc9961 Test Acc9977 Test Acc9981 Test Acc9982 Test Acc9982 Test Acc9985 Test Acc9987 Test Acc9997 Test Acc9994 Test Acc9994 Test Acc9995	Test         Job9961           Job9961         Test           Job998         Test           Job998         Test           Job9980         Test           Job9982         Test           Job9985         Test           Job9985         Test           Job9987         Test           Job99898         Test           Job99895         Test           Job99894         Test           Job9995         Test           Job9995         Test           Job9995         Test	Direct Ma Visit Direct Sa Visit Advertise Direct Ma Direct Ma Advertise Direct Sa Visit Direct Sa Visit Direct Sa Visit	services software es Software nent Financial ilers Professional Services nent Financial es Software es Software es Software es Software es Software	912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665 912345566665	098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322 098765432322	98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333 98765434333333	test9951@angleritech.com test9997@angleritech.com test998@angleritech.com test9982@angleritech.com test9982@angleritech.com test9982@angleritech.com test9992@angleritech.com test9992@angleritech.com test9995@angleritech.com	Inactive Warm Hot Cold Inactive Hot Inactive Hot	Mr. Admin Mr. Admin	21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 21-Apr-2006 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.

	_									Searc	h				
Report	s Leads	by User								Accou	nts 🗾				
Report	Options				o						0 D .	E 10			
Users	Lea	d Source	Industry		Status	Hating	View	Interval			Start Date	End Da			
Admin John Smi Robert St Sheila Jo	h nith ne		▲ All	×	AI	All 💽	All Leads 💽	Created	Custom	×		- <del>10</del>			
🗆 Sho	Show Graphical Report also.														
🗐 Gene	🛢 Generate Report 🛛 🖾 Export to Excel														
Genera	ted Repo	rt.										Print Report			
Report St	ummarized b	vy Lead Ov	iner												
Lead Sou	rce - <mark>All</mark> , In	dustry - All	, Status - <mark>All</mark>	Rating - All, I	.eads - All Lead	ls									
Admin	9997 Reco	rds)													
Name	Company	Job Title	Lead Sourc	e Industry	Phone	Mobile	Fax	Email	Status	Rating	Created Date	e Last Activity			
Mr. Test Lead9993	Test Acc9993	Test Job9993	Advertisemen	: Financial	912345566665	098765432322	987654343333333	test9993@anglerite	<u>ech.com</u> Open	Warm	21-Apr-2006				
Mr. Test Lead9994	Test Acc9994	Test Job9994	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9994@anglerit	<u>ech.com</u> Unqua	ified Inactive	21-Apr-2006				
Mr. Test Lead9995	Test Acc9995	Test Job9995	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9995@anglerite	<u>ech.com</u> Unqua	ified Inactive	21-Apr-2006				
Mr. Test Lead9996	Test Acc9996	Test Job9996	Advertisemen	Financial	912345566665	098765432322	987654343333333	test9996@angleriti	<u>ech.com</u> Unqua	ified Hot	21-Apr-2006				
Mr. Test Lead9997	Test Acc9997	Test Job9997	Direct Mailers	Professional Services	912345566665	098765432322	987654343333333	test9997@angleriti	<u>ech.com</u> Open	Hot	21-Apr-2006				
Mr. Test Lead9998	Test Acc9998	Test Job9998	Direct Sales Visit	Software	912345566665	098765432322	987654343333333	test9998@angleriti	ech.com Qualifie	ed Hot	21-Apr-2006				
Mr. Test Lead9999	Test Acc9999	Test Job9999	Advertisemen	Financial	912345566665	098765432322	987654343333333	test9999@angleriti	<u>ech.com</u> Unqua	ified Cold	21-Apr-2006				
John Sr	nith (0 Rec	ord)													
Name	Company	Job Ti	itle Lea	d Source	Industry	Phone M	lobile Fax E	mail Status	Rating	Created Date	e Last	Activity			
						No reco	ds matched.								
Robert	Smith (0 R	ecord)													
Name	Company	Job Ti	itle Lea	d Source	Industry	Phone No record	lobile Fax E ds.matched.	Email Status	Rating	Created Date	e Last	Activity			
Sheila .	Jone (0 Re	cord)													
Namo	Company	lob Ti	itle Lea	1 Source	Industru	Phone I	tobile Eav E	mail Statue	Bating	Created Date	o last	Activitu			
Traille	company	300.1	Lea	- Source	muusuy	No reco	ds matched.	man status	mauny	Greated Date	Last	Activity			
				Home   Acc	ounts   <u>Contacts</u>	Opportunities   4	Activities   Campaigns	Leads   Forecasts	Reports						

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.