

HOW TO FILTER REPORTS USING A SUB CATEGORY

This guide will show you how to prepare a call report or call spend summary and filter it down using sub-categories. Please note: You will need to set up sub-categorization fields with the sales-i data team to enable this feature. Contact: data@sales-i.com for more information on how to do this.





02 From the available options on the left hand side, click **Reporting**.

Please Note: Different user types will have different options available within the control panel.

Click CRM Reporting





There are various reporting options available.

Select the **VIEW REPORT** button under either the Call Outcome Report or Call Spend Summary option depending on what you wish to see.

porting.		
Opportunities Charts	Call Spend Summary	Call outcome Report utcome Cha
This provides a visual representation of you opportunities.	View total sales and activity for each customer.	This report lists the number of calls each sales user has made and logged in sales-i.
VIEW REPORT	VIEW REPORT	ORT
	nor activities. Opportunities Charts This provides a visual representation of yoo opportunities. VIEW REPORT	porting. n° activities. Call Spend Summary This provides a visual representation of you opportunities. View total sales and activity for each customer. View REPORT

	o sales-i CRM	Reporting	
	CALL OUTCOME	REPORT	
Welcome	lter		
Sales Opportunities			
Opportunities Charts	Please choose whe	ther you want to see	what calls a user has m
	Sales Rep Name	Total Calls Made ▼	Total Calls Allocated
Call Spend Summary	Paul Wright	574 (Click for detail)	580 (Click for detail)
Call Outcome Report	Mike Worthington	226 (Click for detail)	192 (Click for detail)
	Chris Samuel	183 (Click for detail)	182 (Click for detail)
Call Outcome Charts	Oliver Copland	158 (Click for detail)	159 (Click for detail)
	sales-i admin	132 (Click for detail)	114 (Click for detail)
	Angie Wagner	111 (Click for detail)	112 (Click for detail)
	Paul Black	101 (Click for detail)	71 (Click for detail)
	Alex Witcpalek	92 (Click for detail)	93 (Click for detail)

15	Click Filter to show filter options allowing you
))	to customise your report*.

sales-i CRM Reporting

*Depending on your setup, you may see only your own details or multiple users.

06 Select the Start Date and End Date that you wish to see data for.

You can filter by User, or simply leave the settings as default to view all users for your account. You can also change the Analysis Field, Call Type, Call Outcome and Next Action to suit your needs.

You can select **Categorisation** to view your companies sub categories and filter by them.

When you're done, click the green Apply Filters button.

You will now see your chosen results Click on one to open up further information including the option to export or print the information.

1 Income				categorisation:	All		
User:	A				🔺 All		. Date:
End Date:				Call Type:	Power > CSR / SSG	•	Call outcor
Next Action:	n	o filter selected		\$	Power > CSR		
					Power > Other		
lease choose w	hether you want	to see what calls a u	iser has made or wha	at calls a user is allocated to.	Power > SSG - All		
					Power > SSG - Balkamp		
Sales Rep Name	Total Calls Made ▼	Total Calls Allocated			10101-000 2200		
Paul Wright	574 (Click for detail)	580 (Click for detail)					
Mike Worthington	226 (Click for detail)	192 (Click for detail)					
Chris Samuel	183 (Click for detail)	182 (Click for detail)					
Oliver Cardend	158 (Click for detail)	159 (Click for detail)					
Oliver Copland							
sales-i admin	132 (Click for detail)	114 (Click for detail)					
sales-i admin Angie Wagner	132 (Click for detail) 111 (Click for detail)	114 (Click for detail) 112 (Click for detail)					
sales-i admin Angie Wagner Paul Black	132 (Click for detail) 111 (Click for detail) 101 (Click for detail)	114 (Cick for detail) 112 (Cick for detail) 71 (Cick for detail)					
sales-i admin Angie Wagner Paul Black Alex Witcpalek	132 (Click for detail) 111 (Click for detail) 101 (Click for detail) 92 (Click for detail)	114 (Cick for detail) 112 (Cick for detail) 71 (Cick for detail) 93 (Cick for detail)					
sales-i admin Angie Wagner Paul Black Alex Witcpalek Sean Bennison	132 [Click for detail] 111 [Click for detail] 101 [Click for detail] 92 [Click for detail] 89 [Click for detail]	114 (Cick for detail) 112 (Cick for detail) 71 (Cick for detail) 93 (Cick for detail) 44 (Cick for detail)					