

Contact Message Report

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Contact Messages

Purpose:

This report allows you to audit the messages logged on your customer contact records. It is a great report for reviewing rep communication with contacts as well as the details of those contacts made. This can allow the user to essentially run a report for any criteria that service reps consistently log as messages with the corresponding message action. I.E. cold call attempts, interviews scheduled, LMTC, etc...

The screenshot shows the 'Contact Messages' report interface. At the top, there are filter fields for Start Date (7/1/2017), End Date (9/7/2017), Branch (ABC, ABC Onsite, Apple Val), Group by (Rep), Message Action (Cold Call Attempt), Filter by Rep (**All Inactive & TW Reps**), Filter by Contact, and Filter by Customer. A 'View Report' button is on the right. Below the filters is a navigation bar with '1 of 1' and 'Find | Next'. The main content area is titled 'Contact Messages' and 'System'. It shows a summary of messages logged during the specified date range, grouped by Rep. The data is presented in a table with columns: Date, Time, Age, Rep, Action, Contact, Location, Customer, and Department.

Date	Time	Age	Rep	Action	Contact	Location	Customer	Department
alexander.swanson								
8/29/2017	10:07 AM	9 days	alexander.swanson	Cold Call Attempt	Clarkson, Erika	Saint Paul, MN	4295012753 - Micro-Chips	Corporate
Cold call attempt #1								
1 message								
ejames								
8/14/2017	2:55 PM	24 days	ejames	Cold Call Attempt	Lawrence, Remy	Richfield, MN	4294999683 - Murphy Construction	Primary
LVM								
8/9/2017	9:51 AM	29 days	ejames	Cold Call Attempt	Murphy, Chris	Richfield, MN	4294999683 - Murphy Construction	Primary
lvm								
2 messages								
shawna.bradt								
8/11/2017	9:03 AM	27 days	shawna.bradt	Cold Call Attempt	Maple, Timothy	North St. Paul, MN	4294969403 - The Tile Shop	Primary
cold call completed								

Parameters:

1. Start Date: Starting message logged date of your desired date range.
2. End Date: Ending message logged date of your desired date range.
3. Branch: A drop down list of all branches in the user's current hierarchy. Is a multi-value parameter so they can select all branches, just one specific branch or any combination of different branches in the list.
4. Group By: A list of different fields to group the data into on the report. Has the following options:

- a. (none)
- b. Branch
- c. Customer
- d. Date
- e. Rep
- f. Message Action

5. Message Action: A drop down list of message actions. Is a multi-value parameter, therefore you can select all action codes, just one specific code or all action codes.

6. Filter by Rep: A drop down list of reps who logged the message. Is a multi-value parameter, therefore you can select all reps, just one specific rep or all reps.

7. Filter by Contact: Filters for a given contact's messages logged on their file.

8. Filter by Customer: Filters on the customer name for the customer that the contact is linked to.

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