Contact Message Report

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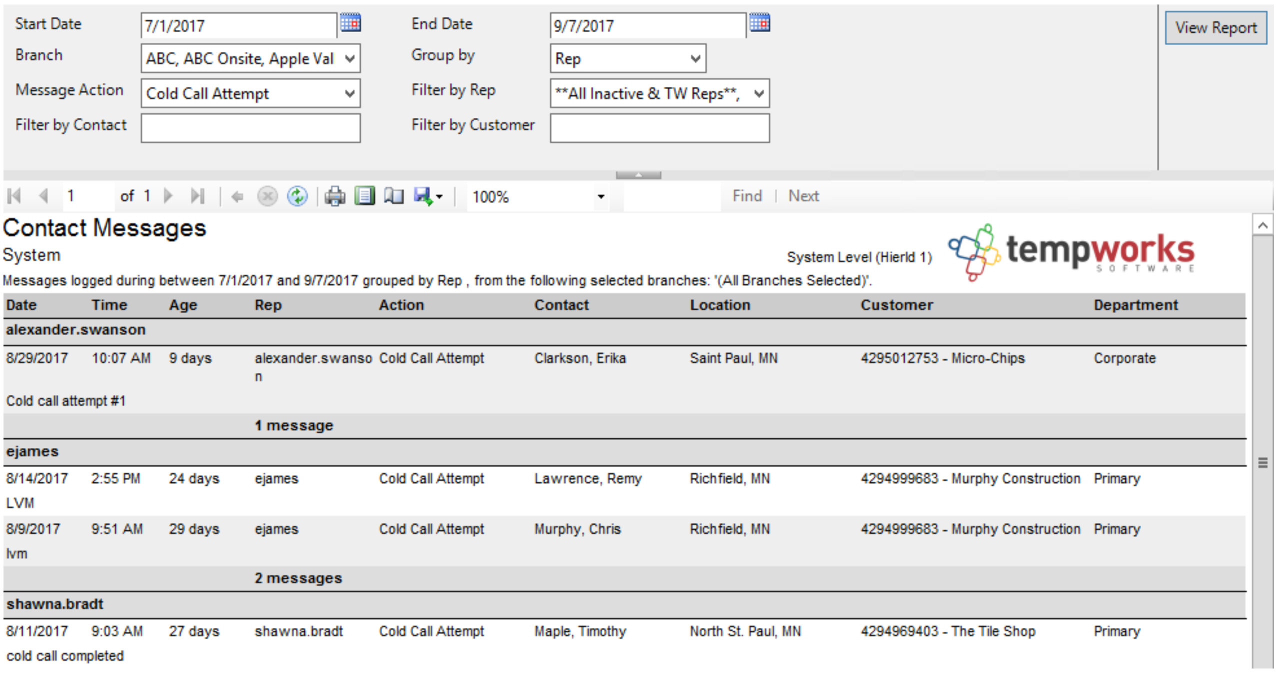
Contact Messages

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...



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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