

Gold-Vision Standard Reports

Report Name	Item Area	Report Output	Selectable Options
Accounts Last Updated	Accounts	Shows the last action against all Accounts (or by selection) – this could be someone accessing the Account, updating it, creating a new Contact or sending an email relating to that Account.	Refine the report by Account Manager, Account Type 1 or view only Events older than 1, 3 or 6 months.
Activities Dashboard	Accounts	Shows all activities created against all accounts for all users (or by selection) – dashboard view allows you to review activities created and closed over a timeline.	Refine the report by Team, User or activity type.
Activities Gantt Chart	Accounts	Shows all activities created against all accounts for all users (or by selection) – Gantt chart view showing activities due over a timeline with percentage of completion.	Refine the report by start date, due date, Team or user.
Activity Notes Summary	Accounts	Notes added to Activities – summarises the notes added to individual Activities (all the Notes are shown for each Activity).	Notes selectable by Activity Owner, creation date of Notes, Activity Status and Type.
Campaign Progress	Campaigns	Graphical and tabular output showing the status of Campaign follow-up Activities based on the different Campaign Activity Stages.	Selection of a specific campaign to report on (or all) and/or by a specific user.
Duplicate Accounts	Accounts	A list of possible duplicate Accounts in the system. Checks for Accounts that may be duplicates – checking is carried out on Account names, Postcodes and main telephone numbers.	No selectable options.
Duplicate Contacts	Contacts	A list of possible duplicate Contacts in the system. Duplicate checking is based on Name, Email address and Mobile phone number.	No selectable options.

Opportunities Last Updated	Opportunities	Tabular output of Opportunities including Opportunity name, Account, Value, Probability, Stage and the last event that occurred against that Opportunity (for example accessing the Opportunity, adding a Note, creating an Activity against it). Based on the last event date the Opportunities are traffic lighted from green (recent activity) to red (no activity for a long time).	Refine the output by Opportunity Owner, Stage, Probability, Age and Status (if the Opportunity is Open or Closed).
Opportunities Next Activity	Opportunities	Shows the next due Activity (ordered by Due Date) for Opportunities. Opportunity information including name, Account, Opportunity Type, Value, Probability, Stage and Estimated Close Date is also shown.	Select to view the next Activities based on Opportunity criteria – by Owner or by Team, by Opportunity Type, Stage, Probability and whether the Opportunities are Open or Closed.
Opportunities Recent Events	Opportunities	Tabular output of Opportunities with Values, Account, Owner, Type, Stage, Probability and the last updated date. Each Opportunity line is expandable to show the most recent events against that item – these include accesses and updates to the Opportunity, Activities created or updated and links or notes added. When there are Notes, these are displayed in full in the report.	Refine the list by Opportunity Owner, State (Open or Closed) and how recent the events are.
Projects Last Updated	Projects	Tabular output of Projects with Account name, Owner, Stage and the details of the last event relating to that Project. Events included are Projects accessed or updated, Activities updated, created or accessed and Notes or links added.	Refine by Project Owner, Stage and Status (Open/Closed) plus select to show only events older than 1, 3 or 6 months as well as all data.
Projects Next Activity	Projects	Shows the next due Activity (ordered by Due Date) for Projects. Project information including name, Account, Type, Value and Stage is also shown.	Select to view the next Activities based on Project criteria – by Owner or by Team, by Project Type, Stage and whether the Projects are Open or Closed.
Sales By Month	Opportunities	Sales by month view showing all closed won sales for all accounts. Shows values for this year, last year and the previous year in a bar chart report.	Refine the report by Team, user, source or type.

Sales Conversions	Opportunities	Opportunities conversion report. Shows conversion of overall created, open, won and lost opportunities. Shows percentage conversion rate as well as total value across all opportunities.	Refine by date, team, user, opportunity type and source.
Sales Pipeline	Opportunities	Graphical output showing total open and closed Opportunity values for current month, next month and month after. Tabular output of Opportunities plus details on Owner, Stage, Estimated Close Date, Values and Margins split out by month of Estimated Close Date.	True/False options for displaying Open, Closed Won and Closed Lost Opportunities and for showing This Month, Next Month and Month After. Account Manager can also be selected to show only Opportunities for Accounts managed by that user.
User Activity	Users	Report layout output showing all activities, projects and opportunities worked on by user in Gold-Vision during a specified period.	Refined by user from a specific date.
User and Team Memberships	Users	Tabular output of object membership information – shows who is an owner of an item or a member of that item (plus what Role they have for members).	Refine the view to a specific User or Team, by the Object Type (i.e. Account, Activity, etc) and by the Role relating to that item.