

The MosaicCRM Reports module includes a dynamic report form to monitor the source of where each pipeline opportunity originated. With the Report Configuration tools, you can pinpoint any number of variables by User, Group, Time and Source. The results will illustrate the origination and progress through the sales stages and the associated sales value and forecasted close dates.

1: Opportunity Source Module – Dynamic Configuration Criteria

Report Configurations

- Go to Reports, Completed Sales section and select 'Opportunity Source'
- Select by individual Owner
- Select by Group or ALL
- Select by specific source or ALL sources
- Select by Date Range

2: Results – Reconfigure and Sort by Header

The report allows you to re-configure the results by clicking on the header: Account, Product, Opportunity Source, Stage, e.g. Owner. The report will re-sort and provide the results broken down by the Owner.

Account	Product	Opportunity Source	Stage	Close Date	Value	Prob	Net Value	Owner
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011	24,750.00	1%	247.50	bgreskowiak
Yellow Submarine Marketing	Trucksides	Past client-new opportunity	Prospect	04/01/2011	141,409.00	1%	1,414.09	bgreskowiak
Chrysalis	Trucksides	Contract Renewal	Proposal Negotiated	01/21/2011				
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011				
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011				
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011				
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011				
RPM Advertising	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011				
Billups Worldwide Cincinnati	Trucksides	New client	Proposal Presented	03/01/2011				
Laird Christianson Advertising	Trucksides	Leasing-Call in	Proposal Presented	04/01/2011	39,200.00	1%	392.00	bgreskowiak
Laird Christianson Advertising	Trucksides	Leasing-Call in	Proposal Presented	04/01/2011	19,600.00	1%	196.00	bgreskowiak
Direct Partners	Trucksides	New client	Proposal Presented	02/15/2011	64,350.00	1%	643.50	bgreskowiak
Dubbs & O'Meara	Trucksides	Trade/Sponsorship	Proposal Presented	04/01/2011	16,500.00	1%	165.00	bgreskowiak
VML Kansas	Trucksides	Past client-new opportunity	Proposal Presented	01/31/2011	15,200.00	1%	152.00	bgreskowiak
M & I Bank	Trucksides	Past client-new opportunity	Proposal Presented	05/02/2011	88,852.00	1%	888.52	bgreskowiak
Bojangles	Trucksides	New client	Proposal Presented	06/15/2011	20,130.00	1%	201.30	bgreskowiak
Chrysalis	Trucksides	Contract Renewal	Proposal Negotiated	01/21/2011	46,270.00	1%	462.70	bgreskowiak
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011	24,750.00	1%	247.50	bgreskowiak
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011	38,500.00	1%	385.00	bgreskowiak
Yellow Submarine Marketing	Trucksides	Current client-new market opportunity	Proposal Presented	03/01/2011	57,750.00	1%	577.50	bgreskowiak
CW 50 DC	Trucksides	New client	Proposal Presented	03/15/2011	50,400.00	1%	504.00	bgreskowiak
DC Dept of Health	Trucksides	New client	Proposal Presented	04/01/2011	23,100.00	1%	231.00	bgreskowiak
Laird Christianson Advertising	Trucksides	Leasing-Call in	Proposal Presented	04/01/2011	25,200.00	1%	252.00	bgreskowiak
Cox Communications		Leasing-Call in	Proposal Presented	03/01/2011	16,000.00	1%	160.00	bgreskowiak
Direct Partners	Trucksides	New client	Proposal Presented	02/15/2011	28,600.00	1%	286.00	bgreskowiak
Adworks	Trucksides	Past client-new opportunity	Proposal Presented	04/15/2011	135,400.00	1%	1,354.00	bgreskowiak
Opportunity Total : 26					Value Total : 1,136,799.00		Net Value Total : 11,367.99	

Configure by Header

- The report allows you to re-configure the results by clicking on any Header.