

CONSTELLATION1

Top 5

**Constellation1
CRM Reports**

Constellation1 CRM allows you to efficiently manage contact and lead information. This guide highlights the top 5 reports available in the platform for users.

Agent Activity Report

The Agent Activity Report provides details on leads, contacts, and marketing activity by agent.

Reports

Reports provides a set of pre-built reports that can be viewed, exported and printed.

Choose Report (Tip: Click the drop-down arrow to select a report.)

Agent Activity Report This report will give you details on leads, contacts, and marketing activity by agent.

Select Parameters

Office: ABC Realty Oceanside User: Christine Markuson

Date Selector: 08/25/2015 to 09/25/2015 Run Report

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Agent Activity Report From 9/25/2015 to 9/25/2015

Office Name	Agent Name	Leads Accepted	Leads Declined	Leads Retracted	Leads Manually Added	Leads Managed	Average Acceptance Time	Shortest Acceptance Time	Longest Acceptance Time	Logins
ABC Realty Oceanside 9100002	Christine Markuson 1234	2	2	0	0	43				92
	Office Total	2	2	0	0	43				92
Total		2	2	0	0	43				92

Page 1 of 1 Report generated by Christine Markuson on 9/25/2015

Agent Activity - Legend

Office Name	The office name for the associated agent
Office ID	The internal office code for the office name
Agent Name	The agent's name
Agent ID	The internal agent ID for the agent
Leads Accepted	The number of leads the agent has accepted in the reporting period
Leads Declined	The number of leads declined by the agent in the reporting period
Leads Retracted	The number of leads retracted from the agent in the reporting period
Leads Manually Added	The number of leads manually added by the agent in the reporting period
Leads Managed	The number of leads the agent has edited in the reporting period
Average Acceptance Time	The average time from when a lead is routed to when it is manually accepted by the agent
Shortest Acceptance Time	The shortest time from when a lead is routed to when it is manually accepted by the agent
Longest Acceptance Time	The longest time from when a lead is routed to when it is manually accepted by the agent
Logins	The number of times the agent logged in
Last Login	The last time the agent logged in
Time Logged In	The total time the agent was logged in
Average Session Time	The average session Time for the agent
Contacts Added	The number of contacts added in the reporting period
Contact Status Changes	The number of contact status changes in the reporting period
CMAs Created	The number of CMAs created in the reporting period
CMAs Emailed	The number of CMAs emailed in the reporting period
Flyers Created	The number of flyers created in the reporting period
Flyers Emailed	The number of flyers emailed in the reporting period
APMs Created	The number of APMs created in the reporting period
APMs Changed	The number of APMs modified in the reporting period
APM Activity Subscribed	The number of APMs subscribed in the reporting period
APM Activity Unsubd	The number of APMs unsubscribed in the reporting period
Buyers Tour Created	The number of buyer tours created in the reporting period
Buyers Tour E-Mailed	The number of buyer tours emailed in the reporting period

Agent Lead Activity Report

The Agent Lead Activity Report will show information on an agent’s lead activity.

Reports

Reports provides a set of pre-built reports that can be viewed, exported and printed.

Choose Report (Tip: Click the drop-down arrow to select a report.)

Agent Lead Activity Report This report will show information on an agent’s lead activity.

Select Parameters

Office: User:

Date: to Run Report

Select a date range

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Agent Lead Activity Report From 11/20/2010 to 12/14/2010

Broker Name	Agent Name	Office Name	Lead Source	New Leads	Leads Accepted	Leads Not Accepted	Lead Validated Within 24hrs	Percentage Validated	0 - 4hrs	0 - 4 hrs %	4 - 8hrs	4 - 8 hrs %
Albuquerque Office ID:	Emilie Chavez Agent ID:	Paseo Office ID:	User Website	1	1	0	0		0	0.00%	0	0.0
	Bonnie Kelly Agent ID:	Paseo Office ID:	User Website	1	1	0	0		0	0.00%	0	0.0
	Arthur Miller Agent ID:	Paseo Office ID:	User Website	1	1	0	0		0	0.00%	0	0.0
Total				3	3	0	0		0	0.00%	0	0.0

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Agent Lead Activity - Legend

Office Name	The office name for the associated agent
Office ID	The internal office code for the office name
Agent Name	The agent's name
Agent ID	The internal agent ID for the agent
Lead Source	The lead source(s) for the leads listed
New Leads	The number of leads added within the reporting period
Leads Accepted	The number of leads accepted by the agent
Leads Not Accepted	The number of leads not accepted by the agent
Leads Validated within 24 hours	The number of leads with updated lead status
Percentage Validated	The percentage of leads that have an updated lead status
0 - 4 hrs	The lead status has been updated under 4 hours
0 - 4 hrs %	The percentage of lead status updated under 4 hours
4 - 8 hrs	The lead status has been updated from 4 to 8 hours
4 - 8 hrs %	The percentage of lead status updated from 4 to 8 hours
8 - 24 hrs	The lead status has been updated from 8 to 24 hours
8 - 24 hrs %	The percentage of lead status updated from 8 to 24 hours
Actioned 24+ hrs	The lead status was updated after 24 hours
Unactioned	The lead status has not been updated

Lead Activity Report

This Lead Activity Report will give you details on the incoming leads tied to properties by office and agent.

Reports
Reports provides a set of pre-built reports that can be viewed, exported and printed.

Choose Report (Tip: Click the drop-down arrow to select a report.)

Lead Activity Report This report gives you details on the incoming leads tied to properties by office and agent.

Select Parameters

Office: ABC Realty Oceanside User: Christine Markuson

Date Selector: 08/25/2015 to 09/25/2015 [Run Report](#)

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Lead Activity Report From 8/25/2015 to 9/25/2015

Office Name	Agent Name	Lead Name	Current Lead Status	Current City	Current Zip	# Visits *	Last Activity Dtm *	Total Properties Viewed *	Total Properties Saved	Total Property Inquiries	Top 3 Zip Saved	Average Saved Value (000's)
ABC Realty Oceanside 9100002	Christine Markuson 1234	Abby Abigail	Hot	Anytown	92656	5	9/15/2015 10:48:37 AM	0	3	0	92604 92620	1,166
		Dan Buyer		Anywhere	85258	0		0	0	0		0
		Priest Kallawadia				0		0	0	0		0
		RF Cover P405319274229				0		0	0	2		0
		Office Total					5		0	3	2	
Company Total						5		0	3	2	1,166	

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Lead Activity - Legend

- Office Name: The Office name for the associated agent
- Office ID: The internal office code for the office name
- Agent Name: The agent's name
- Agent ID: The internal agent ID for the agent
- Lead Name: The registered lead name
- Current Lead Status: The lead status
- Current City: The current city for the registered lead
- Current Zip: The current zip for the registered lead
- # Visits*: The number of visits by the registered lead in the reporting period
- Last Activity Dtm*: The last time the registered lead visited the website
- Total Properties Viewed*: The total number of properties viewed by the registered lead in the reporting period
- Total Properties Saved: The total number of properties saved by the registered lead in the reporting period
- Total Property Inquiries: The total number of property inquiries by the registered lead in the reporting period
- Top 3 Zip Saved: The top three zip codes of properties saved by the registered lead in the reporting period
- Average Saved Value (000's): The average value (in thousands) of properties saved by the lead in the reporting period
- Under \$100k Viewed/Saved: The number of properties viewed/saved under \$100,000 by the lead in the reporting period
- \$100 - \$200k Viewed/Saved: The number of properties viewed/saved between \$100,000 and \$200,000 by the lead in the reporting period
- \$200 - \$300k Viewed/Saved: The number of properties viewed/saved between \$200,000 and \$300,000 by the lead in the reporting period
- \$300 - \$400k Viewed/Saved: The number of properties viewed/saved between \$300,000 and \$400,000 by the lead in the reporting period
- \$400 - \$600k Viewed/Saved: The number of properties viewed/saved between \$400,000 and \$600,000 by the lead in the reporting period
- \$600 - \$1M Viewed/Saved: The number of properties viewed/saved between \$600,000 and \$1 million by the lead in the reporting period
- Over \$1M Viewed/Saved: The number of properties viewed/saved over \$1 million by the lead in the reporting period
- Total Time on Site*: The total time the registered lead spent on the website during the reporting period
- Shortest Time on Site*: The shortest time the registered lead spent on the website during the reporting period
- Longest Time on Site*: The longest time the registered lead spent on the website during the reporting period
- Average Daily Use*: The registered lead's average daily use

*Requires Who's Online and Most Active Contacts

Lead Assignment Report

This Lead Assignment Report will show lead routing and assignment details by office and agent.

Reports

Reports provides a set of pre-built reports that can be viewed, exported and printed.

Choose Report (Tip: Click the drop-down arrow to select a report.)

Lead Assignment Report ▼ This report will show lead routing and assignment details by office and agent.

Select Parameters

Office: ▼ User: ▼

Date Selector: 📅 to 📅 Run Report

Select a date range Select a date range

1 of 1 ▶ Select a format ▼ Export

Lead Assignment Report

	Assignment Date	Capture Date	Lead Type	Lead
Leads Assigned to Organization:	ABC Realty Oceanside-Of-101483-web01 9100002			
Leads Assigned by:	System			
Leads Assigned to:	Christine Markuson 1234			
	8/25/2015 10:46:12 PM	8/25/2015 10:46:09 PM	n/a	RFCover P405319274229
Assignee Total:	1			
Assigner Total:	1			
Office Total:	1			

Lead Assignment - Legend

Lead Assigned to Organization	The company the lead is assigned to
Lead Assigned By	Who assigned the lead (system, means it was assigned based on automatic lead routing rules)
Lead Assigned To	Who the lead was assigned to
Assignee total	How many leads were assigned by this user
Assigned Total	How many leads were assigned to this user
Office Total	How many leads were assigned to users in this office
Assignment Date	The date and time the lead was assigned
Capture Date	The date and time the lead was received in the system
Lead Type	The lead type
Lead	The name of contact/lead

Lead Information Report

The Lead Information Report provides detailed information on leads, including contact preferences and referral source by office and agent.

Reports

Reports provides a set of pre-built reports that can be viewed, exported and printed.

Choose Report (Tip: Click the drop-down arrow to select a report.)

Lead Information Report This report will give you details on leads including preference and referral source by office and agent.

Select Parameters

Office

Contact LastName

Lead Type

 Absentee Owner
 Active Listing
 Business Associate

User

Source

 Android Mobile Company Website - Registration
 Company Website - 30DaysMarketTrend
 Company Website - 60DaysMarketTrend

Date Selector to Run Report

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Select a format
Export

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Lead Information Report

Request Date/Time : 9/24/2015 5:22:15 PM	Contact Name : Buyer Dan
Home Phone Number :	Requester Email : david.gray@realestatedigital.com
Work Phone Number :	Best Time to Contact : No Preference
Prefers Response By : No Preference	Lead Status :
Referral Source : rDesk	
Existing Customer : Yes	
Mailing Address : 111 Main Street Anywhere AZ 85258	
Most Recent Note :	

Lead Information - Legend

Request Date/Time	The date and time lead was captured in the system
Contact Name	The contact's name
Requester Email	The contact's email address
Home Phone Number	The contact's home phone number
Work Phone Number	The contact's work phone number
Best Time to Contact	The best time to contact the lead
Prefers Response By	The contact's preference for being reached by phone or email
Lead Status	The lead status
Referral Source	The lead source
Existing Customer	If the contact is already in the system
Mailing Address	The contact's mailing address
Most Recent Note	The most recent note entered on the contact's record