

Prospect Notes

Last Modified on 01/18/2023 5:24 pm EST

The Prospect Notes Report is designed to print a listing of Ticket (Service or Inspection) and/or Job scheduled appointments for Technicians and/or Installers. This report may be generated for a single date or a date range.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

Report Selections

Salesperson - The default is to display data for all Salespersons. If the data for only certain salespersons is desired, you may highlight the first salesperson, then depress the CTRL key and highlight additional salesperson names within the list.

- *Hide Inactive Sales people* - This option is not selected by default. If inactive Salespersons are not to be included in the report, select this option.

- *Show Each Salesperson* - This option is not selected by default. If this option is selected, a new page will print for each Salesperson selected.

Department - The default is to display data for all Departments. If the data for only certain departments is desired, you may highlight the first department, then depress the CTRL key and highlight additional departments within the list.

- *Hide Inactive Departments* - This option is not selected by default. If inactive Departments are not to be included in the report, select this option.

- *Show Each Department* - This option is not selected by default. If this option is selected, a new page will print for each Department selected.

Date Range - Select the date range to include notes. The date used in this report is the date on which the note was saved.

Sort By - The report default is to sort by Company Name. Other sorting options are Prospect Name, Status and Follow-up Date.