We are currently updating our site; thank you for your patience.

CRM BASICS
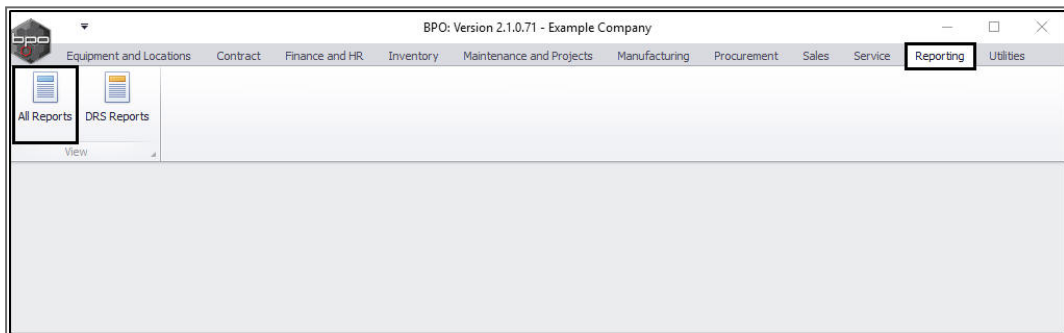
REPORTING

To view certain CRM reports, you will have to access them via the All Reports functionality in Nucleus Service.

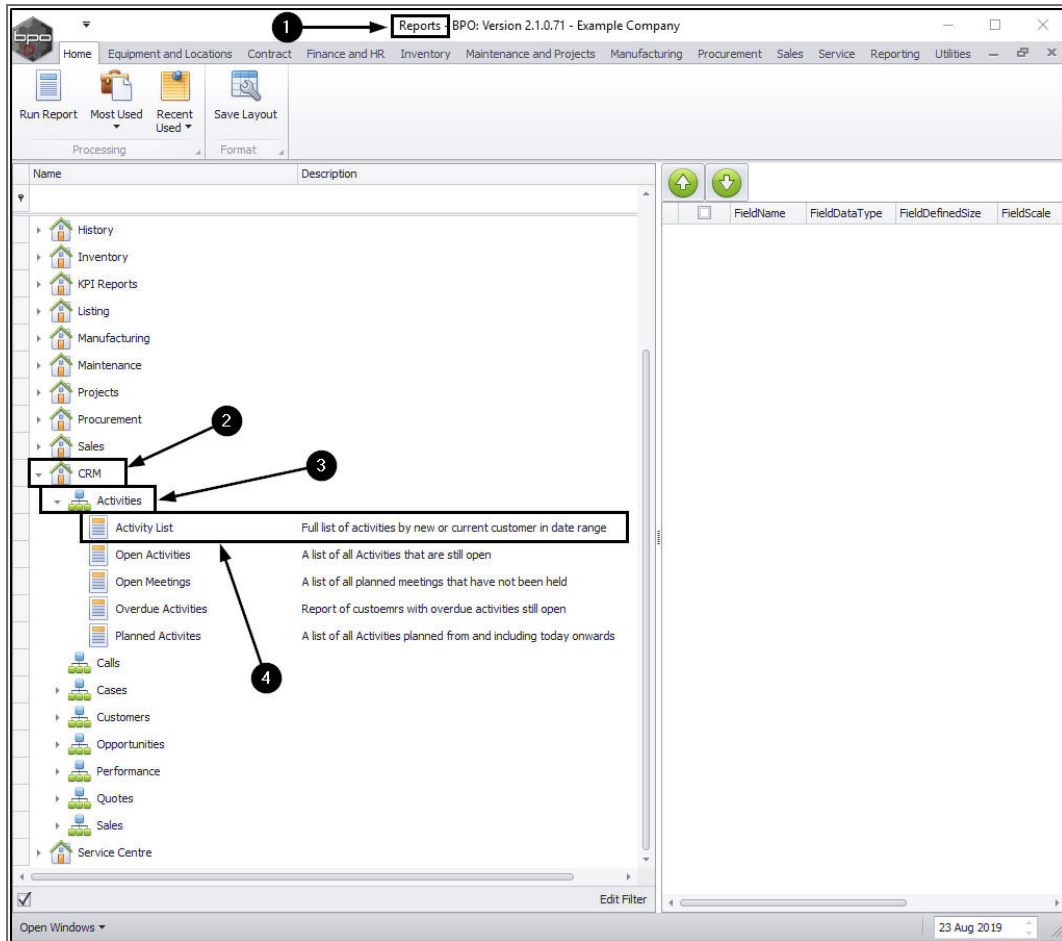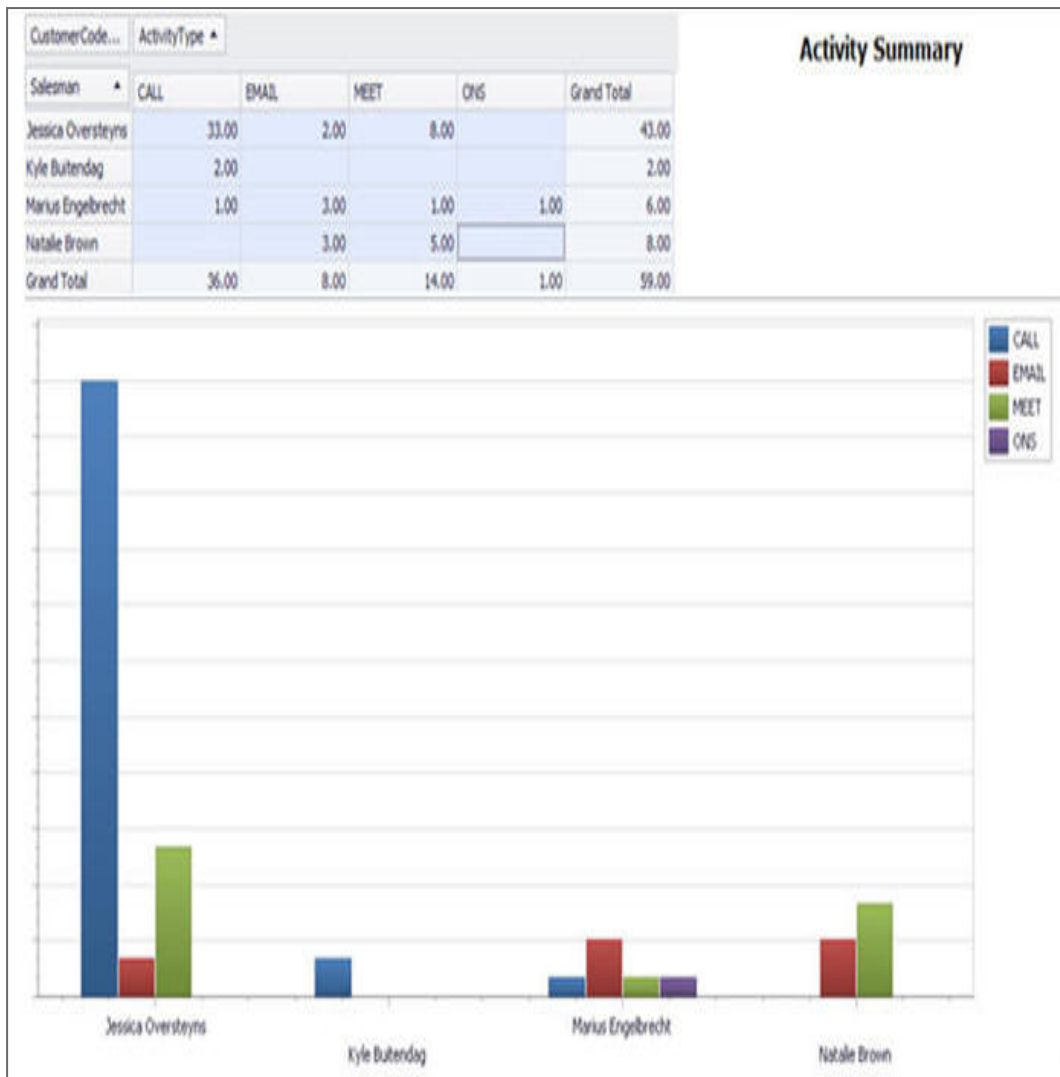**Ribbon Access:** Nucleus Service > Reporting > All Reports

REPORTS – ACTIVITIES

1. In the **Reports** listing screen;
2. Search for and select the **CRM** tree view icon.
3. The CRM sub-report layer will open, select the **Activities** tree view icon.
4. The Activities sub-report layer will open, select **Activity List** from the list of reports.

A summary of the activities by salesperson and activity type will be displayed. From this you can easily see who is working and who is not.

Sales people can be remunerated based on activities, and with this dashboard you can corroborate the activities done.

Salesman	CALL	EMAIL	MEET	ONS	Grand Total
Jessica Oversteyns	33.00	2.00	8.00		43.00
Kyle Buitendag	2.00				2.00
Marius Engelbrecht	1.00	3.00	1.00	1.00	6.00
Natalie Brown		3.00	5.00		8.00
Grand Total	36.00	8.00	14.00	1.00	59.00

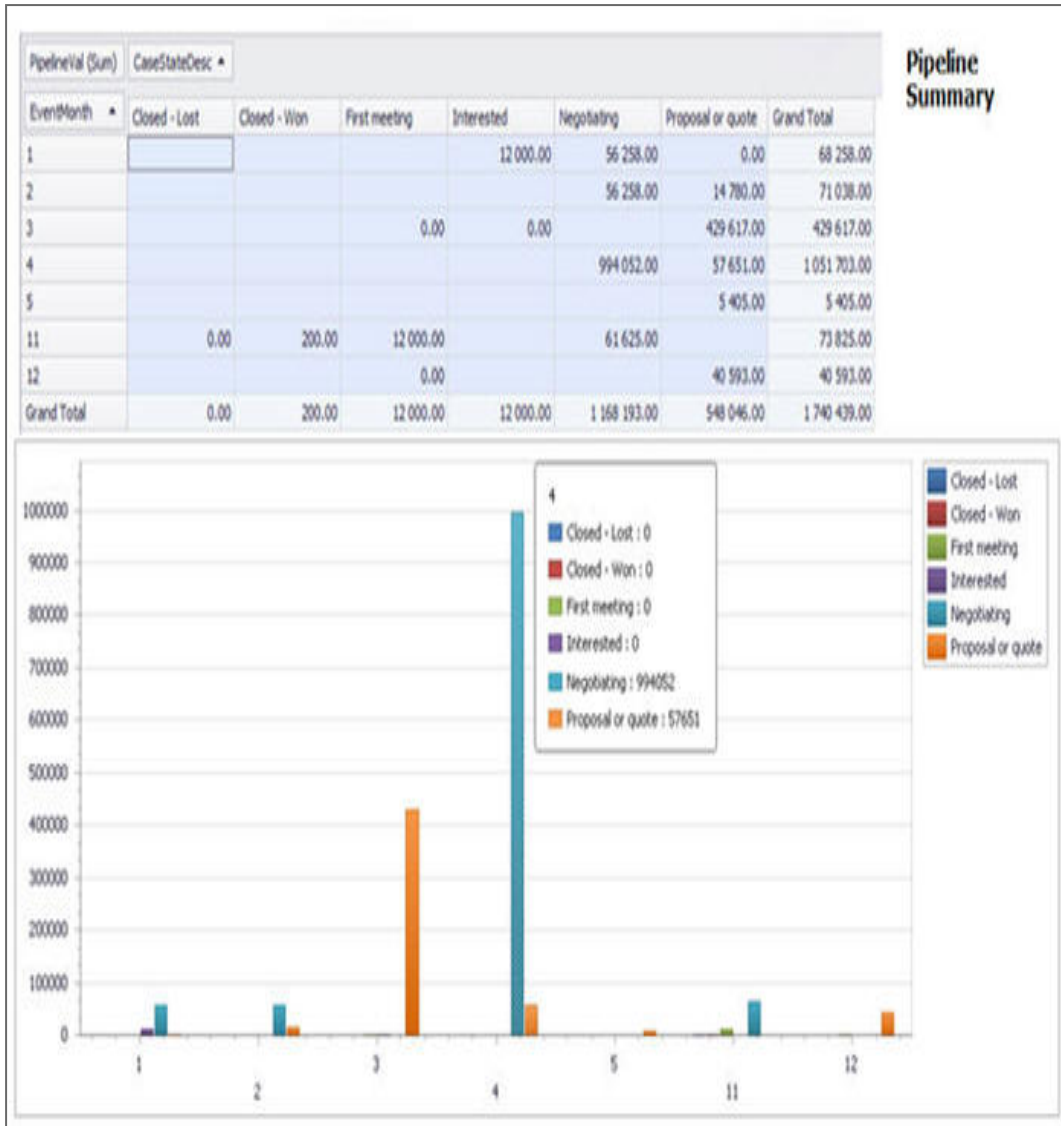# REPORTS – PIPELINE SUMMARY

1. In the **Reports** listing screen;
2. Search for and select the **CRM** tree view icon.
3. The CRM sub-report layer will open, select the **Opportunities** tree view icon.
4. The Opportunities sub-report layer will open, select **Pipeline Summary** from the list of reports.
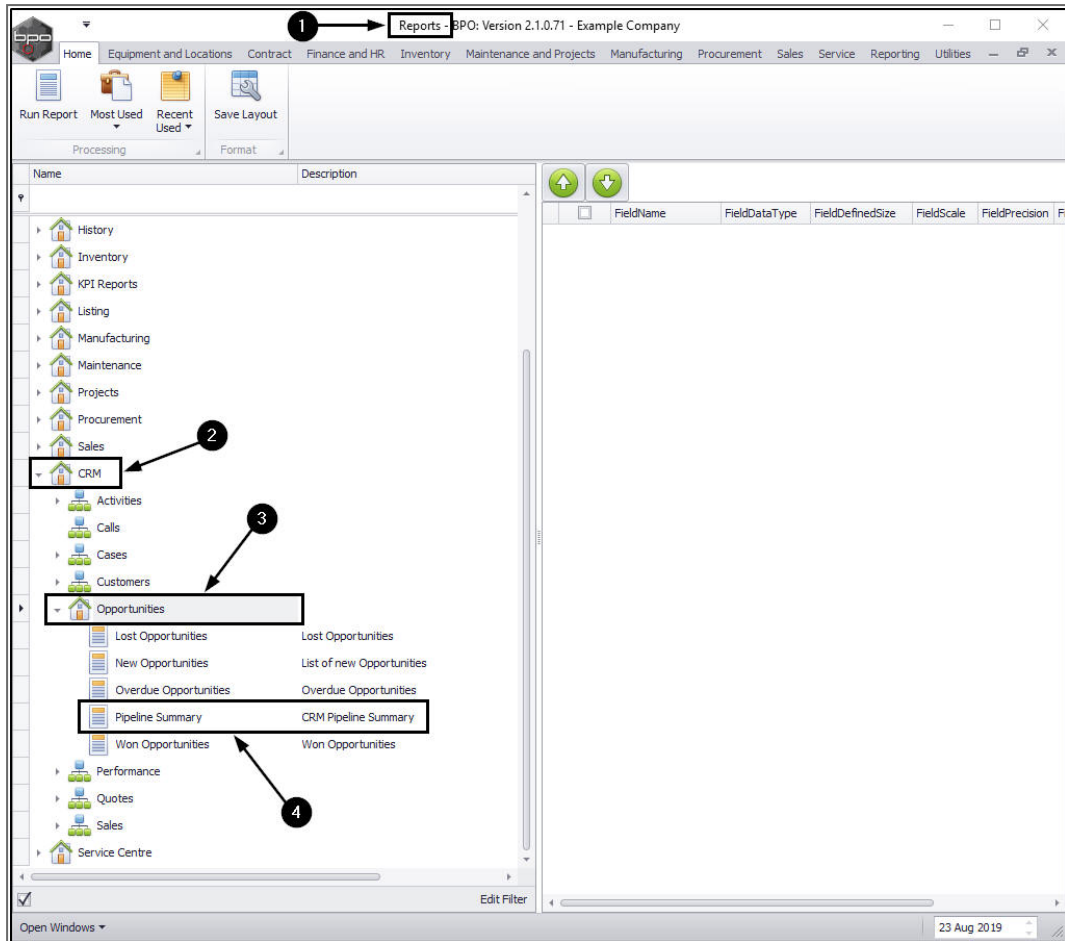
A summary of all the deals in the pipeline and the potential value of the deals will be displayed. If the deal GP is R100,000 and the sales stage is 50% then it will count R50,000 into the pipeline.

This report also takes the **estimated completion** date into account.

PipelineVal (Sum)	CaseStateDesc ▲						
EventMonth ▲	Closed - Lost	Closed - Won	First meeting	Interested	Negotiating	Proposal or quote	Grand Total
1				12 000.00	56 258.00	0.00	68 258.00
2					56 258.00	14 780.00	71 038.00
3			0.00	0.00		429 617.00	429 617.00
4					994 052.00	57 651.00	1 051 703.00
5						5 405.00	5 405.00
11	0.00	200.00	12 000.00		61 625.00		73 825.00
12			0.00			40 593.00	40 593.00
Grand Total	0.00	200.00	12 000.00	12 000.00	1 168 193.00	548 046.00	1 740 439.00

Pipeline Summary

CRM.000.002