

Customized Reporting Solution

Business information systems are a repository of valuable data – however the data is not always available in a structured manner that allows managers to make informed decisions. A customized reporting solution solves that problem because it presents the data in a format that the managers need. Benefits of a customized reporting solution include:

- Presents the data in an organized manner for your operation
- Consolidates the data you need into one report so that managers can make informed decisions
- Expands your ERP and CRM reporting systems
- Filter, group, and summarize the data that is important to you

Customized Reporting Solution Developed by Dynamic Consulting

Here is an example of a customized reporting solution for a CRM system. The criteria (such as Project Names, Account Names, etc.) are different for each report giving the user very flexible selection and filtering options. Some reports can also be automatically emailed to co-workers and/or customers reducing paperwork.

Custom Reports - v1.1.2

BlockTimeDetailTimeLogs-v1.0.1.rpt
 EngineerTimeLogsByEngineer-v1.0.1.rpt
 EngineerTimeLogsByTerritory-v1.0.1.rpt
 JournalNotes-v1.0.0.rpt
 OpportunityVendorReferral-v1.0.3.rpt
 PartnerCommissions-v1.0.3.rpt
 ProjectCoordinationMatrix-v1.0.0.rpt
 ProjectsPercentageComplete-v1.0.6.rpt
 SalesRepresentativesCommissions-v1.0.3.rpt

Estimated Completion: From 2/ 1/2010 To 2/28/2010 Date Created: From 3/ 1/2010 To 3/31/2010 Sort Field: Project Number

Project Names: [All] Selected: 3 OP PC's, Annual Trend Renewal, Articulating LCD Wall Arm, Backup Solution, Backup Tape Drive

Account Names: [All] Selected: 1st Avenue Merchant, 1st Choice Computer Supply, 1st Group Titles, A Plus Supply, AAA Computer Supply

Sales Representatives: [All] Selected: Brian May, Buster Jones

Owner Names: [All] Selected: Brian May, Buster Jones

**Dynamic Consulting
Project Status Report - % Complete**

Estimated Completion Date: From 2/1/2010 to 2/28/2010 Sort: Project Number Date Printed: 04/10/2010
 Date Closed: ALL DATES
 Project Names: ALL PROJECTS
 Account Names: ALL ACCOUNTS
 Sales Representatives: ALL REPRESENTATIVES
 Owner Names: ALL OWNERS

Project #	Project Name	Account Name	Sales Rep on Account	Estimated Completion	Date Created	Owner Name	Status
219	FD PC's & Network Maintenance	Schroe Equipment	Mary Maul	02/05/2010	08/28/2009	Jim West	Waiting on Engineer Time
Service Orders for Project: 219				Est. Date	Budgeted Hours	Actual Hours	% Complete
50962082	New	Project - Pre-Install		11/17/2009	0.00	0.00	0.00%
50962749	New	Project - Installation		12/31/2009	6.50	0.00	0.00%
50963073	New	Project - Installation		12/31/2009	6.00	0.00	0.00%
PROJECT TOTAL:					12.50	0.00	0.00%

Project #	Project Name	Account Name	Sales Rep on Account	Estimated Completion	Date Created	Owner Name	Status
295	New Network	Dental Assoc of Rice Lake	Buster Jones	02/15/2010	11/05/2009	Phil Scala	Scheduled
Service Orders for Project: 295				Est. Date	Budgeted Hours	Actual Hours	% Complete
5100529	Open	Project - Cabling			32.00	6.00	18.75%
5100908	New	Project - Live Day		01/28/2010	0.00	0.00	0.00%
50962631	Open	Project - Project Management/Const. Meetings		11/05/2009	0.00	1.00	0.00%
50962915	Open	Project - Installation			61.75	39.25	64.34%
50963090	New	Project - Installation		01/28/2010	8.00	0.00	0.00%
PROJECT TOTAL:				Total Travel Hours: 3.50	101.75	46.25	45.45%

An information system is only powerful and useful if the users can retrieve the data in a format that makes sense to them for their operation and department. A customized reporting solution provides that power and flexibility.



PO Box 8006
 Green Bay, WI 54308
 (920) 883-9048
www.Dynamic-Consulting.net