

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 your 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.

The screenshot shows a software interface for 'Custom Reports - v1.1.2'. It features a sidebar with a list of report templates, a main area with filter options for 'Estimated Completion', 'Date Created', 'Sort Field', 'Project Names', 'Account Names', 'Sales Representatives', and 'Owner Names', and a 'Configure' button. Below the interface is a detailed report titled 'Dynamic Consulting Project Status Report - % Complete'.

Dynamic Consulting Project Status Report - % Complete
 Date Printed: 04/10/2010
 Estimated Completion Date: From 2/1/2010 to 2/28/2010
 Sort: Project Number
 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				Status	Description	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				Status	Description	Est. Date	Budgeted Hours	Actual Hours	% Complete
5100529	Open	Project - Cabling	01/28/2010	32.00	6.00	18.75%			
5100908	New	Project - Live Day	0.00	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	01/28/2010	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.



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