

Appointment report (lead report)

A sample lead report is shown on the right. This report is generated each time we have a lead or an appointment for your campaign. This report is typically released around 8 am CST each morning and will be sent via email along with the all calls report.

The **contact section** includes basic fields such as contact name, company, address, phone, email address, etc.

The **user fields** section shows additional data that might be helpful including sic code, sic header (type of business), number of employees, and county. User fields may be unique to each campaign.

The **call history section** details the activities that have led to the appointment and includes specific notes and history that will be helpful in conducting the appointment.

The **activity section** shows the recommended action for you. In the sample report, we see that our client needs to conduct an in-person appointment on 2-12-19 at 10 am. **This is the most important section.**

If you have any questions regarding the daily reports, please contact your Program Manager.


Alpha Beta Company

Lead/Appointment Report

Contact Information

Company	Simply Simon Manufacturing	Address	1234 Main Street
Contact	Roger Gonzales		
Title			Anytown, State Zip
Phone	(123) 456-7890	Ext.	
Mobile Phone		E-mail	rogersg@simplysimon.com
Salutation	Roger	Web Site	

Current Status

ID/Status	Lead generated	Last Results	
-----------	----------------	--------------	--

User Fields

User 1		User 6	
User 2		User 7	
User 3		User 8	
User 4		User 9	
User 5		User 10	

Call and Email History

Date Range: All Dates

Result	Date	Time	Regarding	Details
Call Completed	1/29/2019	1:51 PM	Linda receptionist said that Roger is the best contact. I left voice mail for Roger.	
Call Completed	2/7/2019	1:18 PM	Talked with Roger. He handled facilities. He asked about specific types of equipment that we sell. They have 15,000 square feet under air with 14 units. Not having specific issues right now but currently, leader has really slow response time and service contract is due in 60 days.	

Address confirmed. Appointment set for Tuesday at 10 am.

Activities

Date Range: All Dates

Type	Date	Time	Durati	Priority	Regarding & Details
Call	2/12/2019	10:00 AM	1 hour	Low	

2/7/2019
Page 1 of 1