



OVERVIEW OF STANDARD REPORTS



Overview of Standard Reports

Overview

Swyft has a series of standard reports for managing a client's field reps. The information on the reports is a direct result of actions taken by the field reps or information provided by the client.

1. Accounts in Database
2. Accounts Not Dispositioned
3. Appointments
4. Assignments
5. Disposition Distance Exceptions
6. Presentment Details
7. Presentments by Result Reason
8. Sold Activity
9. Users and Team

A sample of each report from Mobile Demo is provided with its purpose. Mobile Demo would be replaced with the client name. Each report can be exported into several formats:

- XML file with report data
- CSV (commas delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

For those reports which date ranges are appropriate, the client can select the specific date range for the report. The default date range is the current day.

Overview of Standard Reports

1. Accounts in Database

This report provides the address of each account in the database. The user would select either a customer or prospect and enter a two digit code for a state. This is a point in time report and has no date parameters. The information is either from client data file uploads, interfaces or input through the Add Contact feature of Swyft Mobile. If added through Add Contact the customer ID sequence will be different than those through data file uploads or interfaces.

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CustomerType Prospect State KY

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Accounts In Database Mobile Demo

Swyft ID	Customer ID	Customer Type	Name	Address	Street Name	House Number	City	State	Zip	Latitude
628426	628426	Prospect	2404 LARKIN RD	2404 LARKIN RD	LARKIN	2404	LEXINGTON	KY	40503	38.00
628427	628427	Prospect	2412 LARKIN RD	2412 LARKIN RD	LARKIN	2412	LEXINGTON	KY	40503	38.00
628428	628428	Prospect	2432 LARKIN RD	2432 LARKIN RD	LARKIN	2432	LEXINGTON	KY	40503	38.00
628429	628429	Prospect	2438 LARKIN RD	2438 LARKIN RD	LARKIN	2438	LEXINGTON	KY	40503	38.00
628430	628430	Prospect	2416 LARKIN RD	2416 LARKIN RD	LARKIN	2416	LEXINGTON	KY	40503	38.00
628431	628431	Prospect	2408 LARKIN RD	2408 LARKIN RD	LARKIN	2408	LEXINGTON	KY	40503	38.00
628432	628432	Prospect	2037 HEATHER WAY	2037 HEATHER WAY	HEATHER	2037	LEXINGTON	KY	40503	38.00
628433	628433	Prospect	2049 HEATHER WAY	2049 HEATHER WAY	HEATHER	2049	LEXINGTON	KY	40503	38.00
628434	628434	Prospect	2033 HEATHER WAY	2033 HEATHER WAY	HEATHER	2033	LEXINGTON	KY	40503	38.00
628435	628435	Prospect	2012 HEATHER WAY	2012 HEATHER WAY	HEATHER	2012	LEXINGTON	KY	40503	38.00
628436	628436	Prospect	2028 HEATHER WAY	2028 HEATHER WAY	HEATHER	2028	LEXINGTON	KY	40503	38.00
628437	628437	Prospect	2024 HEATHER WAY	2024 HEATHER WAY	HEATHER	2024	LEXINGTON	KY	40503	38.00
628438	628438	Prospect	2020 HEATHER WAY	2020 HEATHER WAY	HEATHER	2020	LEXINGTON	KY	40503	38.00
628439	628439	Prospect	2016 HEATHER WAY	2016 HEATHER WAY	HEATHER	2016	LEXINGTON	KY	40503	38.00

Overview of Standard Reports

2. Accounts Not Dispositioned

This report would be helpful in identifying which customers or prospects have not been visited by field reps. The address of each account in the database that has not had an outcome indicated by a field rep. The user would select either a customer or prospect and enter a two digit code for a state. This is a point in time report and has no date parameters.

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CustomerType
State

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Accounts Not Dispositioned Mobile Demo

Swyft ID	Customer ID	Customer Type	Name	Address	Street Name	House Number	City	State
628427	628427	Prospect	2412 LARKIN RD	2412 LARKIN RD	LARKIN	2412	LEXINGTON	KY
628428	628428	Prospect	2432 LARKIN RD	2432 LARKIN RD	LARKIN	2432	LEXINGTON	KY
628429	628429	Prospect	2438 LARKIN RD	2438 LARKIN RD	LARKIN	2438	LEXINGTON	KY
628430	628430	Prospect	2416 LARKIN RD	2416 LARKIN RD	LARKIN	2416	LEXINGTON	KY
628431	628431	Prospect	2408 LARKIN RD	2408 LARKIN RD	LARKIN	2408	LEXINGTON	KY
628432	628432	Prospect	2037 HEATHER WAY	2037 HEATHER WAY	HEATHER	2037	LEXINGTON	KY
628433	628433	Prospect	2049 HEATHER WAY	2049 HEATHER WAY	HEATHER	2049	LEXINGTON	KY
628434	628434	Prospect	2033 HEATHER WAY	2033 HEATHER WAY	HEATHER	2033	LEXINGTON	KY
628435	628435	Prospect	2012 HEATHER WAY	2012 HEATHER WAY	HEATHER	2012	LEXINGTON	KY
628436	628436	Prospect	2028 HEATHER WAY	2028 HEATHER WAY	HEATHER	2028	LEXINGTON	KY
628437	628437	Prospect	2024 HEATHER WAY	2024 HEATHER WAY	HEATHER	2024	LEXINGTON	KY
628438	628438	Prospect	2020 HEATHER WAY	2020 HEATHER WAY	HEATHER	2020	LEXINGTON	KY

Overview of Standard Reports

3. Appointments

This report will identify all appointments set up by an individual field rep by another for field reps using the Swyft Mobile Advanced Scheduling feature. The Appointments are for those which have not as yet has an outcome indicated. In summary format, each field rep and the number of appointments outstanding are identified. By selecting the + sign the detail: appointment time and address is viewable. This is a point in time report and has no date parameters. The Appointment Manager module has a calendar view of all appointments.

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Appointments Mobile Demo

Team: Lexington North

User ID	Name	Count						
mob.cquinif	Quinif, Casey	7						
Details	Appointment Time	Swyft ID	Customer Key	Address 1	Address 2	City	State	Zip
	1/6/2015 10:00 AM	667421	667421	349 MADISON PL		LEXINGTON	KY	40508
	1/15/2015 11:30 AM	100000432	8373b9d1a243c3aa	144 Medical Center Drive		Copperhill	TN	37317
	1/22/2015 1:00 PM	703457	703457	514 W SHORT ST	APT 103	LEXINGTON	KY	40507
	2/2/2015 1:00 PM	2092425	2092425	735 W HIGH ST		LEXINGTON	KY	40508
	2/2/2015 4:00 PM	708056	708056	300 MADISON PL	APT C	LEXINGTON	KY	40508
	2/4/2015 9:00 AM	667332	667332	308 MADISON PL		LEXINGTON	KY	40508
	2/10/2015 10:00 AM	708051	708051	311 MADISON PL	APT 2	LEXINGTON	KY	40508
mob.jcannan	Cannan, Jim	4						
Details	Appointment Time	Swyft ID	Customer Key	Address 1	Address 2	City	State	Zip
mob.mjuhlik	Uhlik, Mj	4						
Details	Appointment Time	Swyft ID	Customer Key	Address 1	Address 2	City	State	Zip
mob.mjuhlikg	Uhlik, Maryjane	11						
Details	Appointment Time	Swyft ID	Customer Key	Address 1	Address 2	City	State	Zip
mob.swilkes	Wilkes, Scott	3						
Details	Appointment Time	Swyft ID	Customer Key	Address 1	Address 2	City	State	Zip
	Total:	29						


Overview of Standard Reports

4. Assignments

This report will identify assignments that are set up with the Assignment Manager module and agree with the Current Assignment tab. The Assignments are for those which have not as yet has an outcome indicated or an outcome that the client has determined should remain with the field rep. In summary format, each field rep and the number of assignments outstanding are identified. By selecting the + sign the detail: address is viewable. This is a point in time report and has no date parameters.

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Assignments
Mobile Demo

Team: Lexington North

User ID	Name	Count				
mob.cquinif	Quinif, Casey	508				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
mob.jcannan	Cannan, Jim	36				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
mob.jnelson	Nelson, James	3				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
	11/7/2014	20645 N Pima Road	Suite 230	Scottsdale	AZ	85255
	11/7/2014	8777 N Gaimey Dr	#181	Scottsdale	AZ	852658
	11/7/2014	North Scottsdale Rd		Scottsdale	AZ	85255
mob.mjuhlik	Uhlik, Mj	374				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
mob.mjuhlikg	Uhlik, Maryjane	34				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
mob.swilkes	Wilkes, Scott	699				
Details	Assignment Date	Address 1	Address 2	City	State	Zip
	Total:	1654				

1/13/2015 4:08:39 PM

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5. Disposition Distance Exceptions

This report will identify those accounts for which an outcome was not indicated within a mile of the particular address. This report may not be applicable for all clients based on their business process. The distance exceptions noted could be logical but it is up to the client to draw that conclusion. In the example, meetings can be set up via phone call without being near the specific address. This report has date parameters.

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StartDate EndDate [View Report](#)

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Disposition Distance Exceptions Mobile Demo

Start Date: 1/13/2015 End Date: 1/13/2015

User ID	Account #	Presented On	Description	Distance (mi)
mob.jcannan				
	629126	1/13/2015 3:28:05 PM	Follow Up: Schedule a Meeting	2.293
	bae33377c0bfc450	1/13/2015 3:34:36 PM	Scheduling: Advanced Scheduling	1998.849

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6. Presentments by Result / Reason

This report will summarize all accounts that have an outcome indicated for a given time period. The outcomes are client specific and are a combination of Results and then the Reasons within those Results. The Reasons are viewable in the Mobile App. The report includes each user within a team set up for the client. The user selects the time frame and the channel and interaction type. Some clients may have more than once channel/interaction type depending upon their business process. Reports are available for each combination that client has set up.

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StartDate: 1/1/2015 EndDate: 1/13/2015 View Report

InteractionChannel: Field Reps InteractionType: Sales

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Presentments By Result/Reason Mobile Demo

Role: Business Sales

Team: Lexington North

Start Date: 1/1/2015 End Date: 1/13/2015

	*1 Opp Available	*2 Guide Displayed	*3 Total Dispositions	Follow Up	Not Interested	Scheduling	Sold		Unable to Present	Update Account	Update Assessment
				Schedule a Meeting	Not Interested	Advanced Scheduling	Product	Service	Unable to Present	Update Account	Update Assessment & Schedule
Cannan	0	8	2	1	0	1	0	0	0	0	0
Nelson	0	0	0	0	0	0	0	0	0	0	0
Quinif	0	16	10	5	2	2	0	0	1	0	0
Uhtik	0	19	9	2	0	7	0	0	0	0	0
Wilkes	0	15	3	2	0	0	1	0	0	0	0
Totals	0	58	24	10	2	10	1	0	1	0	0

1/13/2015 4:12:23 PM

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7. Presentment Details


This is the detail report summarized for the Appointments, Presentments by Result/Reason and Sold Activity reports. If applicable, clients can export the report to load to their own reporting database. The report is date driven and combines the field rep information, date of outcome, the outcome itself and the address of the account.

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StartDate: 1/1/2015 EndDate: 1/13/2015

InteractionChannel: Field Reps InteractionType: Sales

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Presentment Details

Mobile Demo

Start Date: 1/1/2015 End Date: 1/13/2015

Time Stamp	Swyft ID	User ID	User Name	Team Name	Customer Key	Street Address	City	State	Postal Code	Program	Disposition Result
1/2/2015 10:43:41 PM	729803	mob.mjuhlikg	Uhlik Maryjane	Lexington North	729803	1014 CHURCHILL DR	LEXINGTON	KY	40505	Advanced Scheduling	Scheduling
1/2/2015 10:54:34 PM	674214	mob.mjuhlikg	Uhlik Maryjane	Lexington North	674214	914 HIGHLAND PARK DR	LEXINGTON	KY	40505	Advanced Scheduling	Scheduling
1/2/2015 11:00:54 PM	100000479	mob.mjuhlikg	Uhlik Maryjane	Lexington North	73a227ef75752b57	1017 CHURCHILL DR	Lexington	KY		Account Information	Follow Up
1/2/2015 11:02:55 PM	729855	mob.mjuhlikg	Uhlik Maryjane	Lexington North	729855	232 CASTLEWOOD DR	LEXINGTON	KY	40505	Advanced Scheduling	Scheduling
1/2/2015 11:10:34 PM	100000487	mob.mjuhlikg	Uhlik Maryjane	Lexington North	98d71b218b86d481					Advanced Scheduling	Scheduling
1/5/2015 8:11:17 AM	2083998	mob.cquinif	Quinif Casey	Lexington North	2083998	630 W HIGH ST	LEXINGTON	KY	40508	Account Information	Not Interested
1/5/2015 8:11:28 AM	708058	mob.cquinif	Quinif Casey	Lexington North	708058	300 MADISON PL	LEXINGTON	KY	40508	Account Information	Unable to Present
1/5/2015 8:12:31 AM	708115	mob.cquinif	Quinif Casey	Lexington North	708115	309 MADISON PL	LEXINGTON	KY	40508	Account Information	Not Interested
1/5/2015 9:49:16 AM	706252	mob.cquinif	Quinif Casey	Lexington North	706252	630 W HIGH ST	LEXINGTON	KY	40508	Advanced Scheduling	Scheduling
1/5/2015 9:54:20 AM	667421	mob.cquinif	Quinif Casey	Lexington North	667421	349 MADISON PL	LEXINGTON	KY	40508	Account Information	Follow Up
1/5/2015 12:31:31 PM	1977333	mob.swilkes	Wilkes Scott	Lexington North	1977333	1536 ALEXANDRIA DR	LEXINGTON	KY	40504	Account Information	Follow Up
1/7/2015 11:30:58 AM	699627	mob.cnelson	Nelson Charles	Lexington South	699627	515 W MAIN ST	LEXINGTON	KY	40507	Advanced Scheduling	Scheduling
1/7/2015 11:32:45 AM	2071034	mob.cnelson	Nelson Charles	Lexington South	2071034	522 W SHORT ST	LEXINGTON	KY	40507	Advanced Scheduling	Scheduling
1/8/2015 3:29:30 PM	100000331	mob.mjuhlikg	Uhlik Maryjane	Lexington North	107a97a15a7391b2	233 Main Street	Copperhill	TN	37317	Advanced Scheduling	Scheduling
1/9/2015 9:41:07 AM	2092039	mob.cquinif	Quinif Casey	Lexington North	2092039	733 W HIGH ST	LEXINGTON	KY	40508	Advanced Scheduling	Scheduling
1/9/2015 11:20:08 AM	699624	mob.cnelson	Nelson Charles	Lexington South	699624	515 W MAIN ST	LEXINGTON	KY	40507	Account Information	Follow Up

Overview of Standard Reports

8. Sold Activity

This report includes only those accounts that a sold outcome was indicated. This report is data driven.

StartDate
 EndDate

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Sold Activity Mobile Demo

Time Stamp	User ID	Result	Reason	Customer ID	Customer Name	Channel	Type	Program
1/9/2015 2:20:00 PM	mob.swilkes	Sold	Product	100000497	Ed Smith	Field Reps	Sales	Sale
1/13/2015 4:54:56 PM	mob.mjuhlik	Sold	Product	703470	510 W SHORT ST APT 102	Field Reps	Sales	Sale

1/13/2015 5:10:25 PM

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9. Current Users and Teams

This report identifies all users on the platform and their team. In some cases, a Swyft Company ID will be included in the report but they will not show up in reporting.



Current Users and Teams Mobile Demo

User ID	Name	Team ID	Team Name
mob.afarmer	Farmer	39000	Lexington South
mob.cnelson	Nelson	39000	Lexington South
mob.jcannangt	Cannan	39000	Lexington South
mob.mfitzpatrick	FitzPatrick	39000	Lexington South
mob.mjipad	Uhlik	39000	Lexington South
mob.mju	Uhlik	39000	Lexington South