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## ACT! Report File Names and Descriptions

### Question

You would like to know the names of the report templates in ACT! for Windows or ACT! Premium for Workgroups and what their functions are.

### Answer

ACT! places 36 report templates into the default Report directory upon installation. Reports are stored in the Reports folder of your database. The reports are divided into four different types. Below is a list of the report file names and their descriptions grouped by type:

Report Name	File name	Description
<b>Contact Reports</b>		
<b>Contact Report</b>	Contact Report.rep	All contact information including Notes, history, and Activities for each contact.
<b>Contact Directory</b>	Contact Directory.rep	Primary address and Home address for each Contact.
<b>Phone List</b>	Phone List.rep	Company name, Company Phone number, Phone extension, and Mobile phone number for each Contact.
<b>Activities</b>	Activities.rep	Information about the Activities scheduled with each Contact during a specified date range.
<b>History Summary</b>	History Summary.rep	List of Tasks completed by each Contact during a specified date range, including: Calls made, Meetings held, and opened Opportunities.
<b>History Summary Classic</b>	History Summary Classic.rep	Total number of attempted Calls, completed Calls, Meetings held, and Letters sent for each Contact during a specified date range.
<b>History - Time Spent</b>	History - Time Spent.rep	Total time spent completing Activities.
<b>Contact Status</b>	Contact Status.rep	Information about the Contact status, including the Last Reach, Last E-mail, and the last time the Contact record was edited.
<b>Source of Referrals</b>	Source of Referrals.rep	Referred By information for each Contact.
<b>*Task List</b>	Task List.rep	Calls, Meetings, and To-do's scheduled with each contact during a specified date range.
<b>*Email List</b>	Email List.rep	Lists Contact Names and their Primary E-mail addresses.
<b>*Notes-Histories</b>	Notes-Histories.rep	Notes and History items for each Contact during a specified date range.
<b>Group Reports</b>		
<b>Group Membership</b>	Group Membership.rep	List of all Groups and their Members.
<b>Group Summary</b>	Group Summary.rep	Notes, Histories, Activities, and Opportunities for all Groups.
<b>Group Comprehensive</b>	Group Comprehensive.rep	All information (including Notes, Histories, Activities, and Opportunities) for each Group and Subgroup.
<b>Group List</b>	Group List.rep	List of all Groups.
<b>Company Reports</b>		
<b>Company Membership</b>	Company Membership.rep	List of all Companies and their Members.

<b>Company Summary</b>	Company Summary.rep	Notes, Histories, Activities, and Opportunities for all Companies.
<b>Company Comprehensive</b>	Company Comprehensive.rep	All information (including Notes, Histories, Activities, and Opportunities) for each Company.
<b>Company List</b>	Company List.rep	List of all Companies.
<b>Company Directory</b>	Company Directory.rep	List of Company addresses and Phone numbers.
<b>Sales Reports</b>		
<b>Totals By Status</b>	Opportunities by Status.rep	Opportunity totals.
<b>Adjusted for Probability</b>	Opportunities Adjusted for Probability.rep	All Opportunities by Contact, with totals.
<b>*Lost Opportunities by Competitor</b>	Lost Opportunities by Competitor.rep	Lost Opportunities listed by competitor.
<b>*Lost Opportunities by Reason</b>	Lost Opportunities by Reason.rep	Lost Opportunities listed by reason.
<b>*Lost Opportunities by Record Manager</b>	Lost Opportunities by Record Manager.rep	Lost Opportunities listed by record manager.
<b>Pipeline Report</b>	Pipeline Report.rep	All Opportunities by Contact and Stage.
<b>Opportunities by Record Manager</b>	Opportunities by Record Manager.rep	Opportunities, Closed/Won Sales, and Lost Sales by Record Manager.
<b>*Opportunities by Company</b>	Opportunities by Company.rep	Complete information for each Company with an Opportunity or a Closed Sale.
<b>Opportunities by Contact</b>	Opportunities by Contact.rep	Complete information for each Contact with an Opportunity or a Closed Sale.
<b>*Opportunities by Group</b>	Opportunities by Group.rep	Complete information for each Group with an Opportunity or a Closed Sale.
<b>*Opportunities Referred By</b>	Opportunities Referred By.rep	Opportunities listed by who referred the Opportunity.
<b>*Sales by Reason</b>	Sales by Reason.rep	Opportunities listed by the reason.
<b>*Gross Margin by Contact</b>	Gross Margin by Contact.rep	Total dollar amount of margin of sales listed per Contact.
<b>*Gross Margin by Product</b>	Gross Margin by Product.rep	Total dollar amount of margin of sales sorted by Product
<b>*Gross Margin by Record Manager</b>	Gross Margin by Record Manager.rep	Total dollar amount of margin of sales sorted by Record Manager.
<b>**Opportunity Graph</b>	Not Applicable	Forecasted or Closed Opportunities, in a bar or line graph. For more information, see "Creating an opportunity graph," under ACT! Online Help.
<b>**Opportunity Pipeline</b>	Not Applicable	The number of Opportunities at each stage of the sales process, in a graphical form. For more information, see "Creating an opportunity pipeline," under ACT! Online Help.

\* Reports you can access from Other Contact Reports, Other Group Reports, Other Company Reports, and Other Opportunity Reports.

\*\*There is no report file associated with this function - this is a hard-coded non-editable formatted display type of report.