

## Running Common Sales Reports

There are various reports available via the Reports folder tree. We have cited some of the more common sales reports. You can refer to the **Report Descriptions** report to view all of the reports available and a brief description of each.

### Marketing Reports

- › **Marketing Source Orders** – shows order county and revenue detail and/or summary information for marketing sources
- › **Top Customer List** – shows top customers based on and sorted by orders opened, orders closed, revenue (total revenue), or premium (title and endorsements)
- › **Trending by {Selection}** – shows monthly opened/closed order county and revenue for twelve months prior to selected date

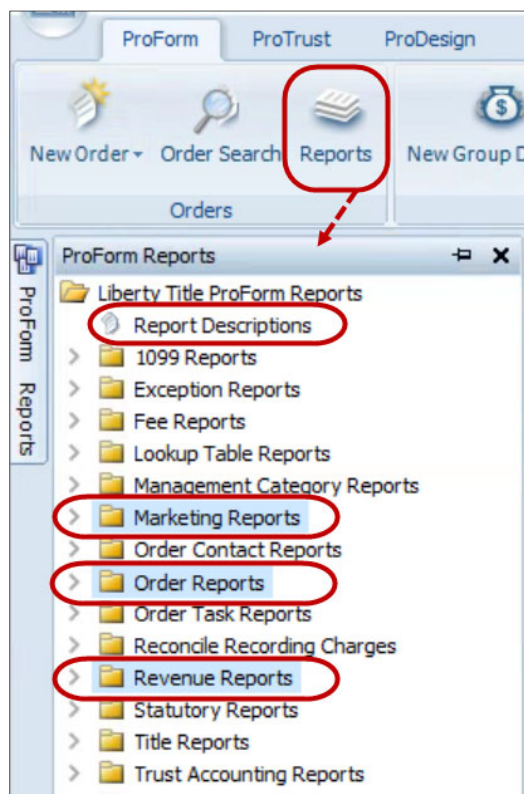
### Order Reports

- › **Opened/Closed Orders by {Selection}** – shows information for orders opened/closed in selected date range
- › **Order County/Revenue Summary** – shows daily (or selected range) and MTD order statistics and projections in three sections: Opened Counts, Closed Counts and Revenue

### Revenue Reports

One of the more common revenue reports is the,

- › **Profit Center Recap** – shows daily, MTD and YTD opened/closed order counts, revenue amounts and closing ratio




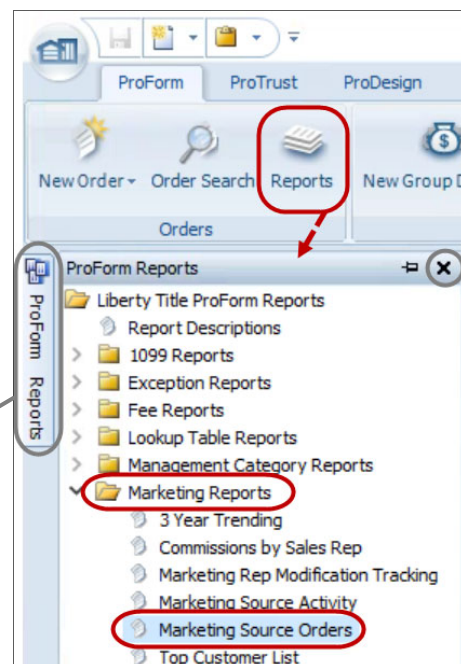
You can select the details shown on the report by your selections (i.e., date range, group/sort by, etc.) on the specific reports parameter window. The report can be printed, published or saved/exported as an Excel file for later viewing.

As an example, outlined on the next page are the steps for generating a Marketing Source Order Report and exporting the report to Excel.

### Generating a Marketing Source Order Report

1. Click the **Reports** button
2. Expand the **Marketing Reports** folder
3. Double-click the **Marketing Source Orders** report

NOTE: The **ProForm Reports** tab is pinned to the program and remains on the screen until you click the **Close**  icon to close the tab.



4. Enter/select the report criteria

- a) **Report type**
- b) **Date range from** = enter the beginning date
- c) **Date range through** = enter the ending date
- d) **Format type**; select **Excel Export** if you wish to view as an Excel file later
- e) **Details-[Group 1, Group 2]**; determines the level of detail (i.e., Escrow Officer, Marketing Source name and/or address, etc.)
- f) **Details-Sort by**, select an option to sort on (i.e., liability, order number, or summarize at a summary level)
- g) **Summary-[Group 1, Group 2, Sort by, Show only X rows]** allows you to group your data multiple ways; when sorting on multiple selections, if nothing is selected all is shown

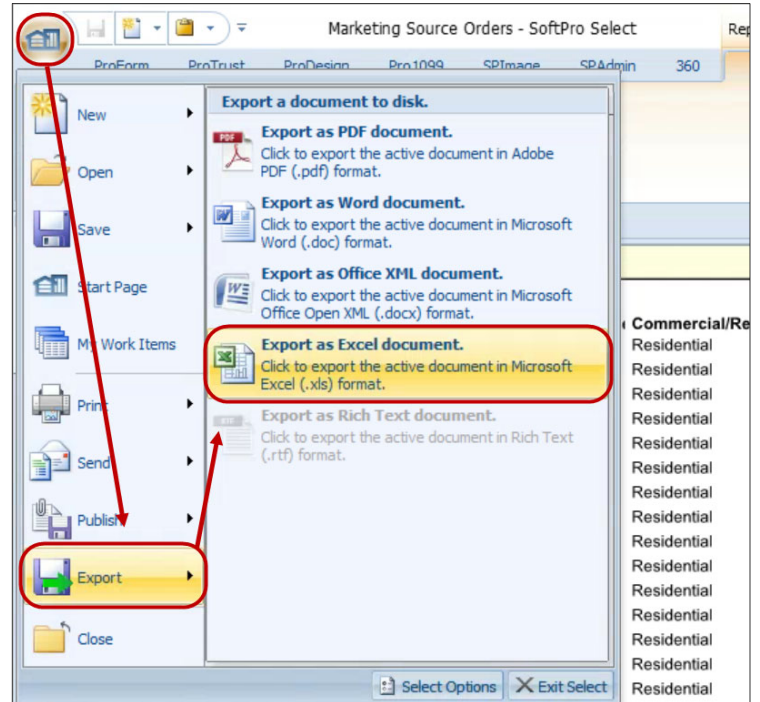
Marketing Source Orders	
Report type:	Opened
Date range from:	03/01/2020
Date range through:	03/19/2020
Format type:	Excel Export
Details-Group 1:	Marketing Source Company
Details-Group 2:	Escrow Officer/Closer
Details-Sort by:	Use "Summary-Sort by" select
Details-Show order type totals:	<input type="checkbox"/>
Summary-Group 1:	Escrow Officer/Closer
Summary-Group 2:	Marketing Source Company
Summary-Sort by:	Orders Opened

5. Click the **OK** button to generate the report

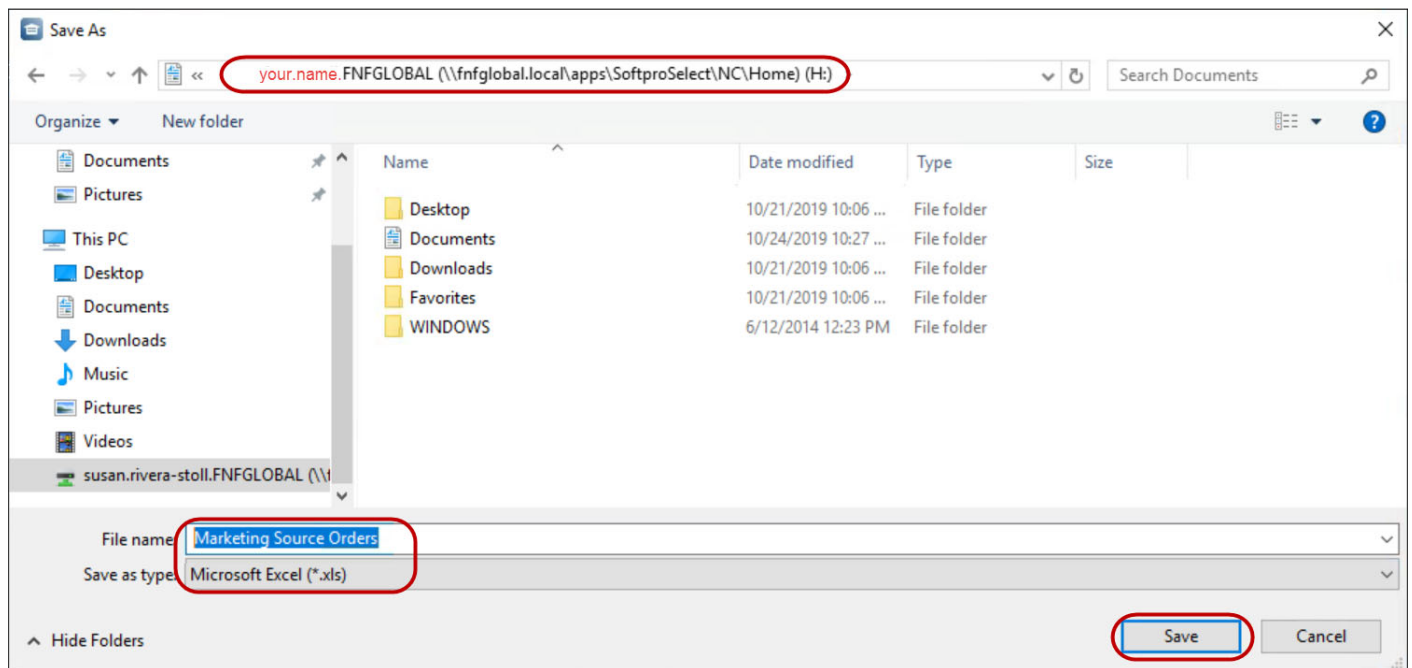
### Exporting the Report to Excel

If you selected **Format type = Excel Export**,

1. Click the **SoftPro** icon
2. Select **Export > Export as Excel document**



3. If this is the first time you are exporting, verify the path shows your **Home** drive; our example shows the **H-**drive as the **Home** drive. Your operation may or may not use the **H-**drive.



4. In the **File name** drop-down, enter your desired report name
5. In the **Save as type** drop-down, verify (or select) **Microsoft Excel (\*.xls)**
6. Click the **Save** button