SQUIRREL
BUSINESS HUB

Wondering what's possible with reports in Zoho CRM?

Below is a list of common reports requested by our clients, please indicate which are of interest to you...

Lead / Prospect module

Lead Conversion - average number of days	☐	Leads by status	☐
Leads grouped by source / referrer	☐	Lead activity by salesperson	☐

Opportunities module

Sales pipeline grouped by stage	☐	Sales per salesperson grouped by stage	☐
Opportunities by lead source	☐	Sales by business division & bid manager	☐
Won vs Lost Opportunities in a period	☐	Reason for lost Opportunities	☐
Compare sales periods - Previous vs Current FY	☐	Pipeline by Probability	☐
Sales by industry, geographical, product/service	☐	30, 60, 90 Day Pipeline	☐
Forecasting - set budgets and track progress	☐	Sales Cycle Duration	☐

Customers

Top 10 customers by value	☐	Customers by industry	☐
Customer type breakdown i.e. Trade vs Retail	☐	Customer last activity time	☐

Activities / Quotes

Activities		Quotes	
Historic activity - calls made, meetings held	☐	Quotes by status or stage	☐
Planning activity - scheduled tasks/calls/events	☐	Quotes by salesperson	☐

Flexible options, tailored to you...ask a Squirrel how!

Your reports can be set up to include data sets from different time periods i.e. weekly, monthly, quarterly and annual. You choose the fields or data you'd like included in the report, how you'd like the data summarised, then set them up to be displayed on a dashboard, emailed to you or you can download and print.