

## 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.

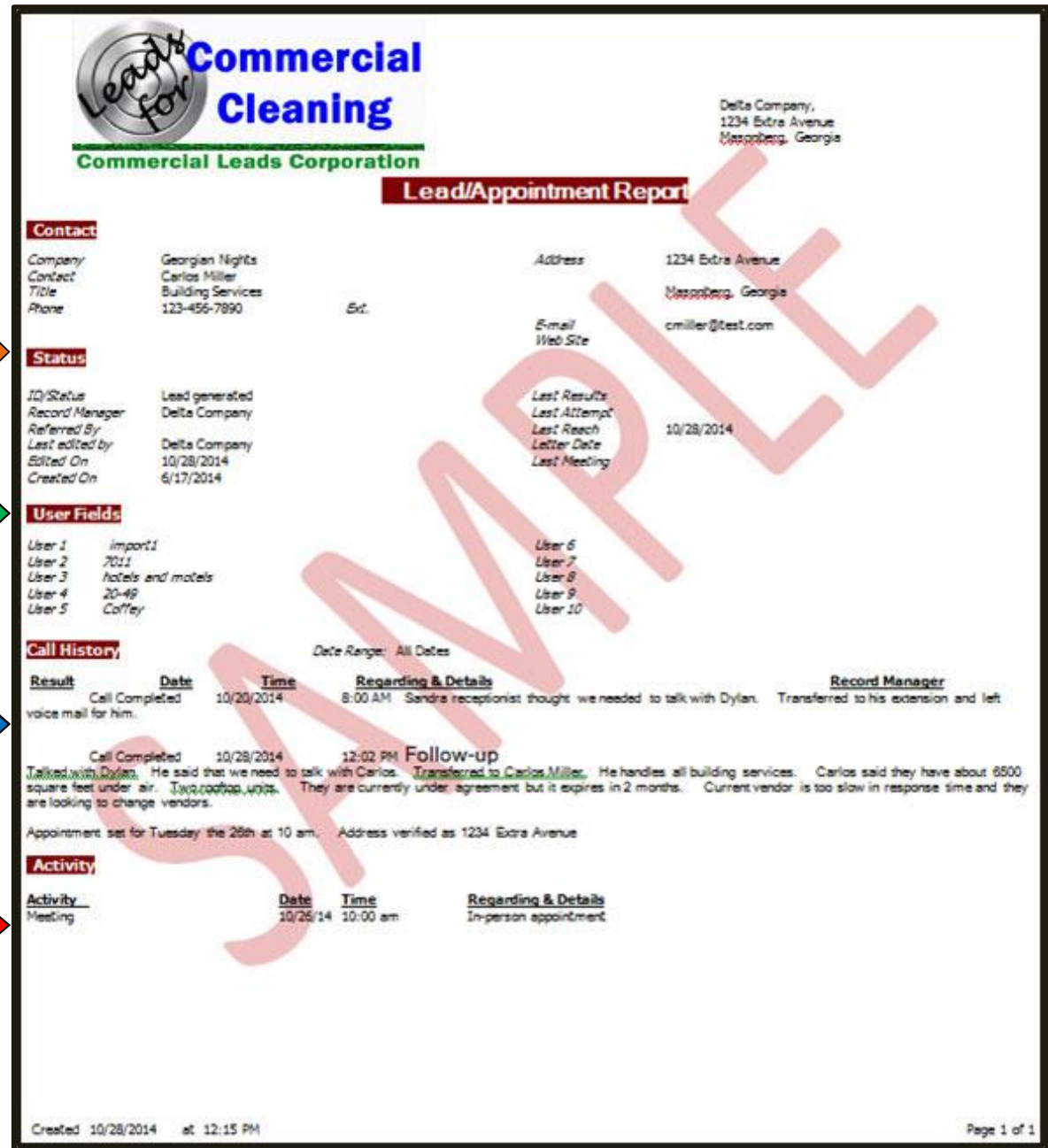
The **contact section** includes basic fields such as contact name, company, address, phone, email address, etc.

The **user fields section** shows additional data that might be helpful. In this sample, the user fields contains the 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 10-26 at 10 am. **This is the most important section.**

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



**Lead/Appointment Report**

Delta Company, 1234 Extra Avenue, Marietta, Georgia

**Contact**

Company	Georgian Nights	Address	1234 Extra Avenue
Contact	Carlos Miller		Marietta, Georgia
Title	Building Services		
Phone	123-456-7890	Ext.	
		Email	cmiller@test.com
		Web Site	

**Status**

ID/Status	Lead generated	Last Results	
Record Manager	Delta Company	Last Attempt	
Referred By	Delta Company	Last Reach	10/28/2014
Last edited by	Delta Company	Letter Date	
Edited On	10/28/2014	Last Meeting	
Created On	6/17/2014		

**User Fields**

User 1	import1	User 6	
User 2	7011	User 7	
User 3	hotels and motels	User 8	
User 4	20-49	User 9	
User 5	Coffey	User 10	

**Call History** Date Range: All Dates

Result	Date	Time	Regarding & Details	Record Manager
Call Completed	10/20/2014	8:00 AM	Sandra receptionist thought we needed to talk with Dylan.	Transferred to his extension and left voice mail for him.
Call Completed	10/28/2014	12:02 PM	Follow-up	
<p>Talked with Carlos. He said that we need to talk with Carlos. Transferred to Carlos Miller. He handles all building services. Carlos said they have about 6500 square feet under air. They are currently under agreement but it expires in 2 months. Current vendor is too slow in response time and they are looking to change vendors.</p> <p>Appointment set for Tuesday the 26th at 10 am. Address verified as 1234 Extra Avenue</p>				

**Activity**

Activity	Date	Time	Regarding & Details
Meeting	10/26/14	10:00 am	In-person appointment

Created 10/28/2014 at 12:15 PM Page 1 of 1