



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.



Rich Enterprises, Inc.

Delta Company,
 1234 Extra Avenue
 Marietta, Georgia

Lead/Appointment Report

Contact	Company: Georgian Nights Contact: Carlos Miller Title: Building Services Phone: 123-456-7890	Address: 1234 Extra Avenue Marietta, Georgia E-mail: cmiller@test.com Web Site:															
Status	ID/Status: Lead generated Record Manager: Delta Company Referred By: Last edited by: Delta Company Edited On: 10/28/2014 Created On: 6/17/2014	Last Results: Last Attempt: 10/28/2014 Last Reach: Letter Date: Last Meeting:															
User Fields	User 1: import1 User 2: 7011 User 3: hotels and motels User 4: 20-49 User 5: Coffey	User 6: User 7: User 8: User 9: User 10:															
Call History	Date Range: All Dates																
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