



Reports

Get a clear view of your business performance with CRM analytics covering revenue, pipeline health, team activities, and sales conversion — all in one place.

Key Features

- **Time Period Filter:** Switch between 7 Days, 30 Days, 90 Days, or 1 Year to focus on the timeframe that matters (applies to Overview, Revenue, Activities, and Conversion tabs)
- **Overview:** Eight KPI cards at a glance — revenue collected, outstanding invoices, new accounts, new projects, win rate, average deal size, activities logged, and won/lost counts — plus a period summary table and a win rate circle showing your project outcome ratio
- **Revenue:** Monthly revenue bar chart with horizontal breakdowns by top 10 accounts and by project type
- **Pipeline:** A live snapshot of all active projects by stage (Proposed, Contracted, Planning, In Production, On Hold) and project type, an upcoming 90-day start timeline, and an aging table that flags stale proposals
- **Activities:** Daily activity bar chart, task completion rate, activity breakdown by type, and most-active accounts in the selected period
- **Conversion:** Quote funnel (Total → Accepted → Declined), contract signing rate, average

days to close, and a 12-month conversion trend table

How to Use

1. Open the **Reports** page from the sidebar
2. Select a **time period** at the top — 7 Days, 30 Days, 90 Days, or 1 Year
3. Click a **report tab** — Overview, Revenue, Pipeline, Activities, or Conversion — to switch views
4. The page updates instantly when you change the period or tab

Tips

- Start with **Overview** for a quick health check — the win rate circle gives you an instant read on how many projects ended in a win vs. a loss
- The **Pipeline** tab is always a live view of your current active work; the time period filter does not apply here
- In the **Pipeline** aging table, any proposal or planning-stage project that hasn't moved in more than 30 days is flagged in red — your cue to follow up
- The **Conversion** trend table color-codes each month's quote acceptance rate: green (50%+), yellow (25–49%), or red (under 25%), so improving or declining close rates are easy to spot at a glance
- Use **Activities** to identify quiet periods and confirm that key accounts are getting consistent attention
- Revenue breakdowns by account and project type help you identify your most profitable client segments