



## 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.



Delta Company,  
 1234 Extra Avenue  
 Marietta, Georgia

### Lead/Appointment Report

**Contact**

Company	Georgian Nights
Contact Title	Carlos Miller
Title	Building Services
Phone	123-456-7890

**Status**

JD/Status	Lead generated
Record Manager	Delta Company
Referred By	Delta Company
Last edited by	Delta Company
Edited On	10/28/2014
Created On	6/17/2014

**User Fields**

User 1	import1
User 2	7011
User 3	hotels and motels
User 4	20-49
User 5	Coffey

Address

1234 Extra Avenue  
 Marietta, Georgia

Ext.

E-mail  
 cmiller@test.com

Web Site

Last Results  
 Last Attempt  
 Last Reach  
 Letter Date  
 Last Meeting

10/28/2014

User 6  
 User 7  
 User 8  
 User 9  
 User 10

**Call History** Date Range: All Dates

Result	Date	Time	Regarding & Details	Record Manager
Call Completed voice mail for him.	10/20/2014	8:00 AM	Sandra receptionist thought we needed to talk with Dylan.	Transferred to his extension and left
Call Completed Talked with Dylan. He said that we need to talk with Carlos. 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.	10/28/2014	12:02 PM	Follow-up Transferred to Carlos Miller. He handles all building services. Carlos said they have about 6500 square feet under air. JWS/CP/PP/WT/MS	

Appointment set for Tuesday the 26th at 10 am. Address verified as 1234 Extra Avenue

**Activity**

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

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