

# Common Reports And Uses

This article discusses some of the most commonly utilized reports in PlayMaker.

1. Advanced AE Summary Report
2. Daily Visit Report
3. Detailed AE Account Activity Report

## Advanced AE Summary Report

The Advanced AE Summary report provides a snapshot by marketer of the number of accounts called upon and referrals received.

**Advanced AE Summary Report**  
A summary of account activity and referrals generated by the Account Executive.

Business Line:

Select Territory:  from

Role:

Include Parent Accounts:

Sort By:

Your report returned **106** results:

USER	CALLS SCHEDULED CURRENT WEEK	COMPLETED SALES CALLS WITH NOTES WTD	COMPLETED SALES CALLS LAST WEEK	COMPLETED SALES CALLS WITH NOTES LAST WEEK	TOTAL NUMBER OF ACCOUNTS	ACCOUNTS WITH NO COMPLETED EVENTS 30 DAYS	ACCOUNTS WITH NO COMPLETED EVENTS 90 DAYS	REFERRALS LAST WEEK	ADMISSIONS LAST WEEK	WTD PENDING	WTD ADMITS	MTD ADMITS	ADMITS LAST MONTH	CURRENT YTD ADMITS	PRIOR YEAR ADMITS
<a href="#">View Calendar</a> Aaron Fox	0	0	0	0	1	1	1	0	0	0	0	0	10	16	0

## Daily Visit Report

The Daily Visit report gives a snapshot of sales activities for a specific period of time, which can be filtered to display all events for a particular account or a particular marketer.

## Daily Visit Report

What are my open/completed daily sales activities?

Select Territory:  from

Date Range:

Marketer/User:    Me

Role:

Account:

Sort By:

Your report returned 10 results:

CONTACT DATE	TIME IN	TIME OUT	USER	ACCOUNT NAME	CONTACT FREQUENCY	VISIT TYPE	CALL / VISIT NOTES	COMPLETED
09/06/2017	6:08am	6:38am	Sally Tucker	CENTER FOR INTERNAL MEDICINE	Weekly	Strategic		Not completed
09/06/2017	9:55am	10:25am	Sally Tucker	ADOPTION BY FAMILY THERAPY	Weekly	Sales Call		Not completed
09/06/2017	9:30am	10:30am	Krissy Kaylor	ALDEN NORTH SHORE REHABILITATION & HCC		Meeting		Not completed

## Detailed AE Account Activity Report

The Detailed AE Account Activity report provides the count of referrals or admits and information on the most recent activity with that referral source.

Run the report for each marketer and sort by referrals for the past 30 days descending to see accounts that are producing and whether a marketer has recently visited that referral source.

**Detailed AE Account Activity Report**  
Provides a detailed overview of accounts by user.

Business Line:

Marketer/User:    Me

Include Parent Accounts:

Targeted:

Account Rating:

Visit Frequency:

Inactivity Threshold:

Sort By:

Your report returned 42 results:

ACTIONS	NAME	TARGETED	NUMBER OF ASSOCIATED CONTACTS	SHARED OWNERS	RATING	PRIMARY REFERRING PERSON	NOTES	VISIT FREQUENCY	LAST COMPLETED EVENT	EVENT TYPE	SUBJECT	CONTACTS	CALL/VISIT NOTES	PRIOR YEAR TOTAL ADMITS	ALL REFERRALS YTD	ALL ADMITS YTD	ALL REFERRALS LAST 30 DAYS	ALL ADMITS LAST 30 DAYS
<input type="checkbox"/> <a href="#">View Account</a> <a href="#">New Event</a>	SANCTUARY AT ST MARYS	Yes	0	Jane Berman										2	4	3	4	3
<input type="checkbox"/> <a href="#">View Account</a> <a href="#">New Event</a>	BROOKCREST	Yes	0	Jane Berman										1	3	1	3	1
<input type="checkbox"/> <a href="#">View Account</a> <a href="#">New Event</a>	ALPHARETTA CARDIOLOGY LLC		1	Jane Berman					05/18/2016	Sales Call	test	MARLENE BLAISE	test	132	3	3	3	3
<input type="checkbox"/> <a href="#">View Account</a> <a href="#">New Event</a>	MICHIGAN CHRISTIAN HOME	Yes	0	Jane Berman										1	2	0	2	0

If your organization identifies accounts as "Targeted" or classifies each with an Account Rating, this report can be further refined to focus on just those that matter most.

Or, if you are more focused on the individual contacts, as opposed to their associated accounts, the *Detailed AE Contact Activity Report* will offer similar information at the contact level.

### **Common Uses for these Reports**

Marketers and their managers use this information to calculating Return on Investment (ROI). By comparing the number of sales calls (or events) to the number of referrals that are generated the marketer can identify if their time and effort is paying off.

Another common use for these reports is call planning. Whether used to monitoring scheduled events or identify accounts with little or no recent activity, a marketer and manager can build out a plan for the coming weeks and months.