Transaction Reports

1. **Closed Seller Transactions YTD** added to Company Reports Folder
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $ - Sell Side
   b. Filters: All Transactions, Closing Date = Current FY, Phase=Post Closing, Transaction Side= Seller
   c. Group: Owner Name
   d. Report Type: Transactions
2. **Closed Buyer Transactions YTD** added to Company Reports Folder
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $ - Sell Side
   b. Filters: All Transactions, Closing Date = Current FY, Phase=Post Closing, Transaction Side= Buyer
   c. Group: Owner Name
   d. Report Type: Transactions
3. **My Closed Seller Transactions YTD** added to Agent Reports Folder
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $ - Sell Side
   b. Filters: My Transactions, Closing Date = Current FY, Phase= Post Closing, Transaction Side= Seller
   c. Group: Owner Name
   d. Report Type: Transactions
4. **My Closed Buyer Transactions YTD** added to Agent Reports Folder
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $ - Sell Side
   b. Filters: My Transactions, Closing Date = Current FY, Phase= Post Closing, Transaction Side= Buyer
   c. Group: Owner Name
   d. Report Type: Transactions
5. **Closed Buyer Transactions YTD** added to Propertybase Company Reports.
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Buy Side, Sale Commission Split $- Buy Side
   b. Filters: All Transactions, Closing Date= Current FY, Phase=Post-Closing, Transaction Side=Buyer
   c. Group: Owner Name
   d. Report Type: Transactions
6. **Closed Seller Transactions YTD** added to Propertybase Company Reports.
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $- Sell Side
   b. Filters: All Transactions, Closing Date= Current FY, Phase=Post-Closing, Transaction Side=Seller
   c. Group: Owner Name
   d. Report Type: Transactions

7. **Pending Buyer Transactions YTD** added to Propertybase Company Reports
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Buy Side, Sale Commission Split $- Buy Side
   b. Filters: All Transactions, Closing Date: All Time, Phase=Pre-Closing, Transaction Side=Buyer, and Status<> Cancelled
   c. Group: Owner Name
   d. Report Type: Transactions
8. **Pending Seller Transactions YTD** added to Propertybase Company Reports
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell-Side, Sale Commission Split $- Sell Side
   b. Filters: All Transactions, Closing Date: All Time, Phase=Pre-Closing, Transaction Side=Seller, and Status<> Cancelled
   c. Group: Owner Name
   d. Report Type: Transactions
9. **My Pending Buyer Transactions** added to Propertybase Agent Reports folder.
   a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Buy Side, Sale Commission Split $- Buy Side
   b. Filters: My Transactions, Closing Date: All Time, Phase=Pre-Closing, Transaction Side=Buyer, and Status <> Cancelled
   c. Group: Owner Name
   d. Report Type: Transactions
10. **My Pending Seller Transactions** added to Propertybase Agent Reports folder.
    a. Columns: Transaction Name, Sale Price, Sale Commission Split % - Sell Side, Sale Commission Split $- Sell Side
    b. Filters: My Transactions, Closing Date: All Time, Phase=Pre-Closing, Transaction Side=Seller, and Status <> Cancelled
    c. Report Type: Transactions
11. **My Call Outcomes (Last 30 Days)** added to Propertybase Agent Reports folder.
    a. Columns: Date, Contact
    b. Filters: My Activities, Last 30 Days, Completed Activities, Tasks, Call Outcome<> to ""
    c. Group: Call Outcome
    d. Report Type: Tasks And Events
12. **My Transactions YTD** added to Propertybase Agent Reports Folder
    a. Filters: My Transactions, Closing Date= Current Year, Phase=Post-Closing
    b. Grouped by Closing Date (Month)
    c. Columns= Name, Transaction Side, Salesprice, Commission due
    d. Report Type: Transactions
13. **My Pending Transactions** added to Propertybase Agent Reports Folder
    a. Filters: My Transactions, Closing Date= All Time, Phase=Pre-Closing
    b. Grouped by Closing Date (Month)
    c. Columns= Name, Transaction Side, Salesprice, Commission due
    d. Report Type: Transactions
14. **My Pending & Closed Transactions** added to Propertybase Agent Reports Folder
    a. Filters: My Transactions, Closing Date= All Time, Phase=Pre-Closing **&&&** Post-Closing

b. Grouped by Closing Date (Month)
c. Columns= Name, Transaction Side, Salesprice, Commission Due
d. Report Type: Transactions

15. **All Pending & Closed Transactions** added to Propertybase Company Reports Folder
   a. Filters: All Transactions, Closing Date= All Time, Phase=Pre-Closing **&&&** Post-Closing
   b. Grouped by Closing Date (Month)
   c. Columns= Name, Transaction Side, Salesprice, Commission Due
   d. Report Type: Transactions

16. **All Call Outcomes (Last 30 Days)** added to Propertybase Company Reports folder.
   a. Columns: Date, Contact
   b. Filters: All Activities, Last 30 Days, Completed Activities, Tasks, Call Outcome<> to ""
   c. Group: Call Outcome
   d. Report Type: Tasks And Events

17. **All Pending Transactions** added to Propertybase Company Reports Folder
   a. Filters: All Transactions, Closing Date= All Time, Phase=Pre-Closing
   b. Grouped by Closing Date (Month)
   c. Columns= Name, Transaction Side, Salesprice, Commission due
   d. Report Type: Transactions

18. **My Closed Transactions (YTD)** added to Propertybase Agent Reports Folder
   a. Columns: Transaction Name, Address, City, Sale Price, Commission Due
   b. Filters: My Transactions, Closing Date= Current Year, Status<> Cancelled, Phase=Post-Closing
   c. Grouped by Transaction Side

19. **All Closed Transactions (YTD)** added to Propertybase Company Reports Folder
   a. Columns: Transaction Name, Address, City, Sale Price, Commission Due
   b. Filters: All Transactions, Closing Date= Current Year, Status<> Cancelled, Phase=Post-Closing
   c. Grouped by Transaction Side
   d. Report Type: Transactions

20. **All Cancelled Transactions (YTD)** added to Propertybase Company Reports Folder
   a. Columns: Transaction Name, Address, City, Sale Price, Commission Due
   b. Filters: All Transactions, Closing Date= ALL TIME, Status=Cancelled,
   c. Grouped by Transaction Side

21. **My Cancelled Transactions (YTD)** added to Propertybase Company Reports Folder
   a. Columns: Transaction Name, Address, City, Sale Price, Commission Due
   b. Filters: My Transactions, Closing Date= ALL TIME, Status=Cancelled,
   c. Grouped by Transaction Side
   d. Report Type: Transactions

22. **All Contacts on Lead Rating Follow Up**
   a. Columns: Full Name, Lead Rating, Next Follow Up Date, Last Attempted Contact, Last Contacted, Contact Owner
   b. Filters: All Contacts, Created Date=ALL TIME, Lead Rating= A,B,C,D
   c. Report Type: Contacts

23. **AllContacts on LeadRating F/U by Mobile**

a. Columns: Full Name, Lead Rating, Next Follow Up Date, Last Attempted Contact, Last Contacted, Contact Owner
   b. Filters: All Contacts, Created Date=ALL TIME, Lead Rating= A,B,C,D
   c. Grouped: Mobile Phone
   d. Report Type: Contacts
24. **My Seller Inquiries**
   a. Columns: Inquiry ID, First Name, Last Name, Phone, Email, Price- Min, Price- Max, Size- Min, Size- Max, Bathrooms- Min, Bathrooms- Min, City
   b. Filters: My Inquiries, Created Date= ALL TIME, Inquiry Type= Seller
   c. Grouped by Created Date
   d. Report Type: Inquiries with Contact
25. **My Investor Inquiries**
   a. Columns: Inquiry ID, First Name, Last Name, Phone, Email, Price- Min, Price- Max, Size- Min, Size- Max, Bathrooms- Min, Bathrooms- Min, City
   b. Filters: My Inquiries, Created Date= ALL TIME, Inquiry Type= Investor
   c. Grouped by Created Date
   d. Report Type: Inquiries with Contact
26. **My Client List**
   a. Columns: First Name, Last Name, Email, Phone, Created Date
   b. Filters: My Contacts, Created Date=All Time
   c. Report Type: Contacts
27. **My Call Outcomes (Last Calendar Month)** added to Propertybase Agent Reports folder.
   a. Columns: Date, Contact
   b. Filters: My Activities, Last Month, Completed Activities, Tasks, Call Outcome<> to ""
   c. Grouped: Call Outcome
   d. Report Type: Tasks And Events
28. **My Call Outcomes (this Month)** added to Propertybase Agent Reports folder.
   a. Columns: Date, Contact
   b. Filters: My Activities, This Month, Completed Activities, Tasks, Call Outcome<> to ""
   c. Grouped: Call Outcome
   d. Report Type: Tasks And Events