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| TULCO OILS | CRM – Reports<br>SOP 149<br>Revision B, 10/30/2020<br>Approved by: Don Stanton |

**PURPOSE:**

Within CRM, there are six named reports and three user defined reports available. The six named reports are Addresses, Contact Notes Detail, Contact People, News Feeds, Phone Numbers, and Standard. The user defined reports can be changed under System > Options > Contacts.

**PROCESS:**

1. Navigate to CRM > CRM Reporting.
2. In the Report Type drop-down, choose the report type to be run.
   *Note:* User can enter additional information in the pre-filters if known (i.e. Bill-To Company, Sales Rep, CRM Note Type, etc.)
3. Click the View button in header.
4. The report will populate the appropriate information and can be viewed.

REVISIONS

| Rev | Date | Change |
|---|---|---|
| I/R | 01/24/18 | New |
| A | 3/21/18 | Formatting |
| B | 10/30/20 | Change to v16 Menu names |