Performance Each Account Officer

Report Module Guide: Performance Each AO

Module Location

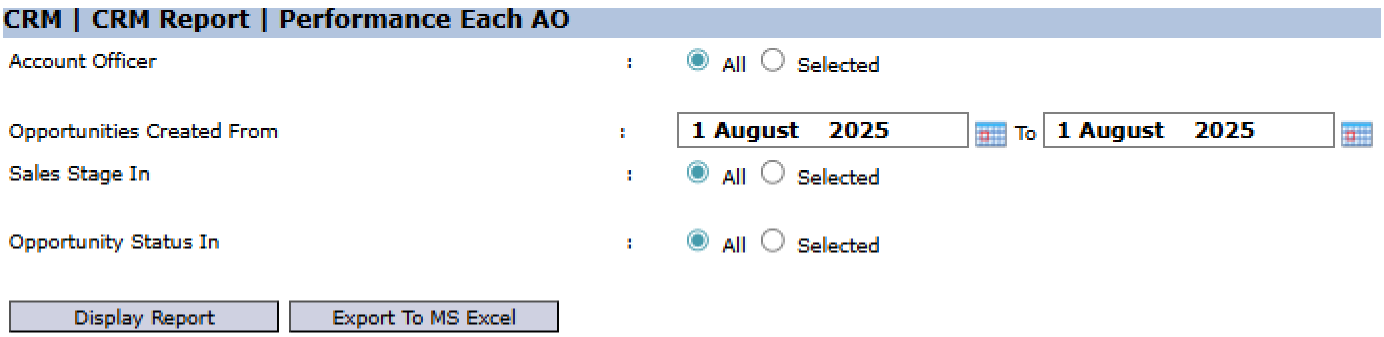
CRM > CRM Report > Performance Each AO

Module Objective

The **Performance Each AO** (Account Officer) report module is used to generate a report that analyzes the performance of each salesperson. This report summarizes their activities and work results based on the opportunity data they manage. It is an important tool for sales managers to conduct evaluations, provide coaching, and measure team achievements.

1. Report Parameters

The main page of this module is a form containing various parameters to customize the performance report that will be generated.


CRM | CRM Report | Performance Each AO

Account Officer : All Selected

Opportunities Created From : 1 August 2025 To 1 August 2025

Sales Stage In : All Selected

Opportunity Status In : All Selected

Display Report | Export To MS Excel

Here is an explanation for each parameter:

- **Account Officer**:
  - Select **All** to display the performance report for all salespeople, or select **Selected** to choose one or more specific salespeople to be evaluated.
- **Opportunities Created From / To**:
  - Specify the opportunity creation date range to define the performance evaluation period (e.g., August 1, 2025).
- **Sales Stage In**:
  - Filter the report to only display opportunities that are in a specific sales stage. Select **All** to include all stages.
- **Opportunity Status In**:
  - Filter the report based on the final status of the opportunities. For example, select **"Won"** to see the win-rate, or **"Lost"** to see failed opportunities. Select **All** to include all statuses.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Select all the parameters you need to focus the report. For example, to see a salesperson's winning performance last month, select the **Account Officer's** name, set the date range to the previous month, and set the **Opportunity Status In** to **"All"**.

Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report**: To preview the performance report directly on your screen. 

- **Export To MS Excel**: To download the report data in an Excel file format.

Tips & Important Notes

- This report is a primary evaluation tool for **Sales Managers** to objectively assess the performance of each member of their team based on data.

- To see how many deals a salesperson won in a specific period, set the date range and filter the **Opportunity Status In** to **"Won"**.

- The accuracy of this report is highly dependent on the salesperson's discipline in managing data in the **Opportunity Module**, especially in updating its status to **"Won"** or **"Lost"** when a deal is concluded.

Revision #2
Created 1 August 2025 10:23:12 by Muhammad Ali Akbar
Updated 15 August 2025 13:14:23 by Muhammad Ali Akbar