



## Agency Operations Reports



### Daily

- **Review Profile Quantity (Profile Reports)**
  - Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0
  - Go to **Reports|Statistics|User Stats**
- **Review Profile Quality (Profile Reports)**
  - Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0
  - Go to **Reports|Profile Reports|Statistics|Completed Field Statistics** (if you have not setup Required Fields profile fields, this is a way to see if these fields are being completed by each agent)
  - Go to **Reports|Profile Reports|List|Detailed or 3 Line summary**. Check that each profile has marketing data, review the profiles for missing data.
  - Click *Columns*, add *Create by Agent* and/or *Primary Agent* plus any specific fields you are interested in viewing.
  - Go to **Reports|Profile Reports|Current Query Results** to print out a "What you see is what you get report."
- **Past Due Reminders (Activity Reports)**
  - Level 1 Query Open Reminders Date: From = (Leave Blank) To =-1,0,0 and Agent Field blank.
  - Go to **Reports|Statistics|User Stats** and sort by **Type**
  - Click *Columns*, and add *Create by Agent* plus any specific fields you are interested in viewing (Activity Remarks)
  - Go to **Reports|Activity Reports|Current Query Results or Reports|Activity Reports|List|Detail**
- **New Trip Inquiries (Activity)**
  - Level 2 Activity Query, Check Reminders, Create Date: From =-1,0,0 To =-1,0,0, with Subject *New Trip Inquiry Follow-up*
  - Go to **Reports|Activity Reports|List in Summary or Detail, or Reports|Activity Reports|Statistics|User Stats**
- **New Trip Inquiries (Res Card Reports)**
  - Level 2 Query Res Cards with Sales Cycle *Under Consideration* From =-1,0,0 To =-1,0,0
  - Go to **Reports|Res Card Reports|Res Cycle Report** sorted by Agent
  - Level 2 Query Res Cards, Active Status From=-1,0,0 TO=-1,0,0
  - Go to **Reports|Res Card Reports|Statistics** and sort by *Reservation Cycle*.



## Weekly

- **Welcome New Customers (Profile Reports)**
  - Level 2 Query Profile Create Date: From =Mon To =0,0,0
  - Go to **Reports|Profile Reports|Client Survey**. Print to include with *Welcome to the Agency* letter
- **Publish Weekly Statistics (Profile Reports)**
  - Level 2 Query Profile Modified Date: From =Mon To =0,0,0
  - Go to **Reports|Profile Reports|Statistics|User Stats**
- **Review Completed Reminders (Activity Reports)**
  - Level 2 Query Reminders Completed From =Mon To =0,0,0
  - Go to **Reports|Activity Reports|Statistics|User Stats** sort by Subject
  - View results of completed reminders by going to **Reports|Activity Reports|Lists|Detail**
- **Review Activities Created (Activity Reports)**
  - Level 1 Query All Notes, Mailers, Reminders, From =Mon To =0,0,0 and Login Name blank
  - Go to **Reports|Activity Reports|Statistics|User Stats** sorted by Type or Subject
- **Welcome Home Customers (Activity Report)**
  - Level 2 Activity Query Open Reminders From =Mon To =0,0,0 with Subject *Welcome Home*
  - Go to **Reports|Activity Reports|Statistics|User Stats** to check if agents are creating reminders
- **Review Bookings Not Paid Yet (Res Card Reports)**
  - Level 2 Res Card, Deposit Due From =Mon To =0,0,0 and Invoiced = No
  - Go to **Reports|Res Card Reports|Current Query Results**
  - Go to **Reports|Res Card Reports|Vendor Booking Report** to review vendors booked to see if any non-preferred vendors have been booked.



## Monthly Routine

- **New Customer Analysis (Profile Reports/Res Card Reports)**
  - Where did they come from? (Level 2 Query Create Date From=1,-1,0 To=31,-1,0)
  - Go to **Reports|Profile Reports|Statistics|Referred by Stats**
  - Did they book anything? (Level 2 Res Card Query Create Date From=1,-1,0 To =31,-1,0)
  - Go to **Reports|Res Card Reports|Reservation Cycle**
  - Did we get Surveys? Was data updated? (Level 2 Query Profile Create Date From=1,-1,0 To =31,-1,0 and and Survey Received customized More Field or Marketing Code)
  - Go to **Reports|Profile Reports|List|3 Line Summary**

- **Current Customer Analysis (Profile Reports)**
  - Where are the niches? Query All Leisure Clients and go to **Reports|Profile Reports|Statistics|Marketing Code Stats**
  - \*What are upcoming birthdays? Level 2 Query in Family Member|Employee tab, and put in present Month in FROM/TO dates. Make sure columns selected are Passenger Last Name and First Name. Go to **Reports|Profile Reports|Lists or Reports|Profile Reports|Current Query Results**
  - \*Special Dates - query All Clients and go to **Reports|Profile Reports|Statistics|Special Date Stats**

\* Check out enhanced Birthday and Special Reports on our website at [www.trams.com](http://www.trams.com), **Products|TRAMS Crystal Reports**.

- **Marketing Activity Analysis (Activity Reports)**
  - Query All Marketing Activities for month and go to **Reports|Activity Reports|Activity Stats** sorted all ways
  - Query all Mailers for month with response date to see how successful were mailings for the month
  - Go to **Reports|Activity Reports|Lists|Summary**
- **Res Card Analysis (Res Card Reports)**
  - Query all Res Cards for month and go to **Reports|Res Card Reports|Reservation Card Cycle** (What cycle are they in and are there any cancellations?)
  - Go to **Reports|Res Card Reports Final Payment Report**
  - Go to **Reports|Res Card Reports Vendor/Service Provider** (What vendors or service providers are they booking? What are destination/vendor trends?)
  - Query *Source of Booking* using the Mailer name, and go to **Reports|Res Card Reports|Client Booking Reports**.



## Inventory Manager Reports

We cannot assign a time frame to run the Inventory Reports since this depends on when you need to review blocked space.

- **Query for Utilization Date and Check Status of Group Space**
  - Go to **Reports|Inventory Reports|Res Card List** to view *Reservation Cycle*
  - Go to **Reports|Inventory Reports|Current Query List** to review usage status. Can also print to distribute to staff.

- **Query for Specific Inventory Space**
  - Go to **Reports|Inventory Reports|3 Line Summary** and verify agency has client details such as address, phone, etc.
  - Go to **Reports|Inventory Reports|Res Card List for details of client bookings**
  
- **TRAMS Crystal Report Passenger Manifest**
  - Query passengers by Group Name
  - Go to **www.trams.com|Products|TRAMS Crystal Reports to print out Passenger Manifest**. Check cabin assignments, travelers, and passenger details