

Trams ClientBase Marketing Dashboard Report

This report can be run for the agency or for each agent.

New Client Profiles - Number of new client profiles created for the date range input.

Client Profiles Updated - Number of client profiles updated for the date range input. Profiles created in the same period are ignored.

Total Client Profiles - Count of client profiles that are currently active.

With E-mails - Percentage of total client profiles that are currently active with e-mail addresses.

E-mails with Marketing Permission - Percentage of client profiles that are currently active that have e-mails addresses with marketing permissions.

With Marketing Codes - Percentage of client profiles that are currently active with marketing codes.

With Complete Address - Percentage of client profiles that are currently active with complete addresses.

With Mailers last 30 Days - Percentage of client profiles that are currently active with mailer sent out in the last 30 days.

Top 10 Marketing Codes - Displays the top 10 marketing codes descending by percentage for client profiles that are currently active

Mailer Analysis - Pie chart displays mailer types as a percentage of all mailers with activity dates for the date range input, Below the pie chart, the total mailer count is displayed.

Client Profiles Sent CBMS Promos - **Sent** is a count of client profiles that are currently active with mailers with a subject starting with Promo sent for the date range input. **Opens** are a count of client profiles that are currently active with mailers with a subject starting with Promo open for the date range input. **Clicks** are a count of client profiles that are currently active with mailers with a subject starting with Promo Click for the date range input. **ResCards** are a count of client profiles that are currently active with mailers with a subject starting with Promo Click for the date range input and a rescard created during the same date range.