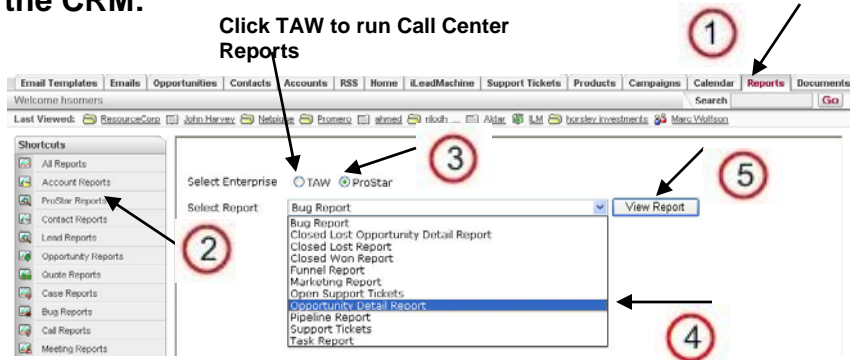


Running ProStar Report within the CRM:

1. At CRM screen, click Reports tab
2. Report Shortcuts, click ProStar Reports (3rd option in list)
3. Check Prostar Reports Radio Button
4. Select Opportunity Detail Reports from Select Report drop down.

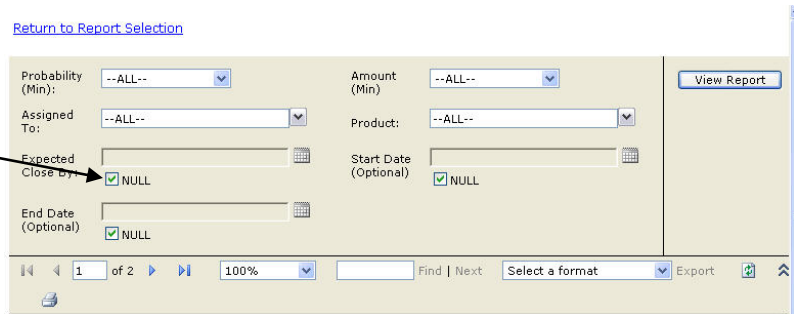
Click TAW to run Call Center Reports



NOTE: You can also select the Funnel and Pipeline Reports from same drop down list.

5. Click View Report
6. You will be prompted to enter filter criteria. Can leave to default, **EXCEPT:** Select Null for Expected Close By: (See below figure).

Can leave to default as shown:
EXCEPT: Select Null for Expected Close By:
 You can select all drop downs for enhanced drill options.



7. The system may take a few minutes, but the report is being generated.

NOTE: The below report has some information removed to avoid showing actual data.

Open Date	Last Modified	User	Product	Account	Opportunity	Weighted	%	Expected Sales	Sales Stage	Expected Close
8/3/2006	2/26/2007								Decision Delaye	4/29/2007
8/31/2006	3/2/2007								Confirmed Inter	4/27/2007
9/3/2006	3/1/2007								Demo Set 40%	4/30/2007
9/15/2006	3/1/2007								Decision Delaye	4/30/2007
10/5/2006	2/16/2007								Decision Delaye	6/1/2007

- Opportunity Detail Report showing:**
- The date Opportunity was opened
 - Last Modified Date
 - The User
 - The Product
 - The Account Name
 - The Opportunity
 - Weighted
 - % to Close
 - Expected Sales in Dollars
 - Current Sales Stage
 - Expected Close Date

Exporting the Report:

1. Select a format from the Select a Format drop down list to save the report to your local drive. (Most users select Excel)
2. Click Export
3. You will be prompted to Open or Save the file
4. Recommend you Open to ensure this is what you want
5. Within Excel you:
 - Change to font
 - Change color
 - Apply filters
 - Create Charts
 - Etc.

