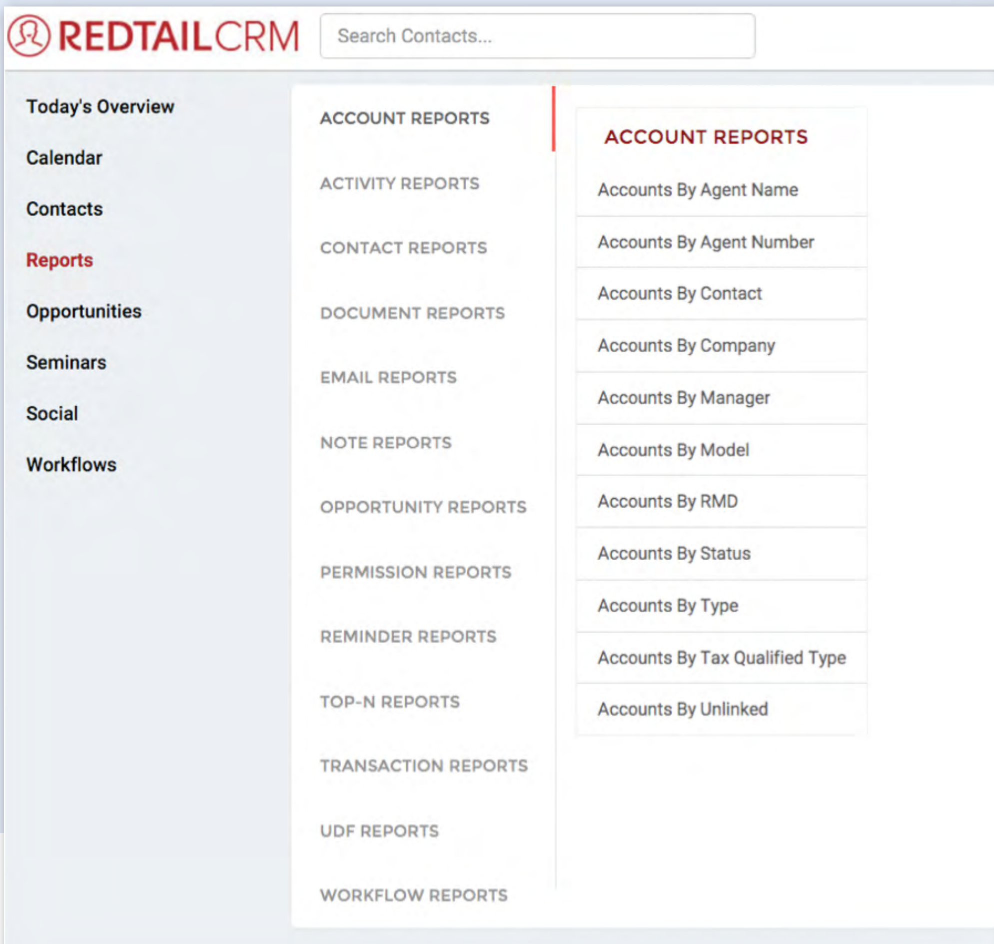
REDTAIL UNIVERSITY FOR NEW USERS

Reports: Realtime Data

Check employee productivity, reward clients for loyalty, incentivize client referrals, access the state of your sales pipeline—real time data to do real life things.



Pull up a list, filter to specific data, send a group to search, export to Excel or take information to a PDF!

REPORT TYPE:	DESCRIPTION:	BEST PRACTICE APPLICATIONS & IDEAS:	REPORT PULLS DATA FROM:
Account Reports "Money Report"	Cast a net over information being fed in through a data aggregator or custodian.	Listed data: • Open/closed/pending accounts • Tax Qualified accounts of clients 55, 65 and 70.5 • Accounts missing from contact records	Accounts tab within a contact's record
Activity Reports "Past, Present, & Future Report"	Activities are always used for things that are GOING to happen. See what's ahead for the office, or look into past items, by isolating a list of activities by date frame, assignee, subject or user.	Filterable data: • See activities assigned to you as you've been out of the office • Check the activities assigned to a colleague going on medical leave • Discover team workload by pulling upcoming activities for the month • Run team reports to see any outstanding (uncompleted) activities	Activities tab within a contact's record
Contact Reports "People Report"	Segment through contacts to target a specific group of clients and position them for success.	Listed data: • Clean up duplicate records in your database • Show where a bulk of business is sourced from • "What contacts haven't we touched base with in the past 6 months?" —Answer this question quickly and easily with adjustable timeframes	Contact details tab within a contact's record Activities and notes within a contact's record Know Your Client tab within a contact's record
Document Reports "File Report"	Documents housed within Redtail's free document storage section. **Not a paperless solution*	Filterable Data: • Pull up a list of database documents with the same name, time frame or document type • Print an Excel of the documents within a contact's record or database wide	Document tab within a contact's record
Email Reports "Correspondence Report"	Automatically link your email correspondence to your contact records. *An additional Redtail service*	Filterable Data: • Pull up a list of clients you emailed about a common subject and follow-up with them • Assess frequency of emails sent or received to a client • Download the original email sent to a client from a colleague's email address	Email History tab within a contact's record
Notes Report "Client Communication Report" ***User Favorite***	It's great to keep history but it's even better to recall history. Help your office answer: "Who did we talk to? When did we talk to them? What did we talk about?"	Filterable Data: • Type in a word or phrase, like "insurance", and pull up all notes with that word entered • Check employee productivity by checking entries made to database by specific users • Pull up history for the past year that has a certain category- like client reviews or trade requests	Notes, completed activities and completed workflows
Opportunities Report "Sales Pipeline Report"	Big picture look at potential business in sales pipeline.	Filterable Data: • Pull up a monthly sales report to see pipeline stages and see if you need to hit the field for more prospects • Hold the office accountable for business won and lost by showing a book of business Closed Won or Closed Lost	Opportunity Stages dropdown within the Opportunities tab

continued

REDTAIL UNIVERSITY FOR NEW USERS

REPORT TYPE:	DESCRIPTION:	BEST PRACTICE APPLICATIONS & IDEAS:	REPORT PULLS DATA FROM:
Permission Reports "Privacy Report" *Accessible by database owner only! Database owner cannot be permissioned from a contact*	The view of Contact records restricted to specific users or teams.	Filterable data: • Make sure viewing permissions are set correctly • View notes permissioned with confidential information like account commission or an internal employee review • See a list of clients that are accessed database wide that may have slipped through the cracks	Permissions tab within a contact's record Permissions dropdown on the notes tab within a contact's record
Reminder Reports "Dates Report"	Actionable items not necessarily reflected or created on your calendar but important things to remember.	Filterable Data: • See client review reminders that need to be scheduled or reviews that have slipped through the cracks • Reward client loyalty by setting up incentives for milestones • Remember account renewal dates to pitch a new service or continue current services • Improve client relationships with Birthday, Anniversary, and other reminders	Account details within the Accounts tab on a contact's record Contact details box within a contact record's overview page Workflow Tasks within the Seminars tab Workflow Tasks within the Workflows tab
Top N Reports "Rank Report"	Top clients in your database deserve a higher level of customer service.	Filterable data: • Companies who hold the highest assets under management • Assets under management for your top 5, 10, 20, 30, 50 or 100 clients • Incentivize referrals by rewarding top referring clients	Contact details box within a contact record's overview page
Transaction Reports "Trades Report"	Monitor trades pending or posted to your database records.	Filterable data: • Isolate trades made for certain stocks • See trades that are pending or waiting to post • Show every buy or sell transaction for the year	Transactions tab within a contact's record
User Defined Fields Reports "Relationship Building Report"	Customizable fields, created by you, to track individualized answers for a client. UDFs help build upon your client relationships with key pieces of info that YOU decide to collect.	Filterable data: • Send grandma's super secret snickerdoodle recipe to client who prefer snickerdoodle cookies • Pull up client drink preferences to stock the fridge before client reviews • Find all your veterans to send them a correspondence for Veterans Day • Organize and report on YOUR fields. The sky's the limit!	User Defined Fields tab within a contact's record
Workflow Reports "Process Management Report"	Find the workflows in progress or the individual to-do tasks that need to be completed.	Filterable data: • Find clients in the middle of an onboarding process to send them referral cards • Find workflows or tasks that are due in the upcoming week to get a jump start • Find the to-do tasks assigned to a team member who is out of the office for a week	Active workflows within the Workflows tab

REDTAIL

REDTAIL Technology
800.206.5030
www.redtailtechnology.com