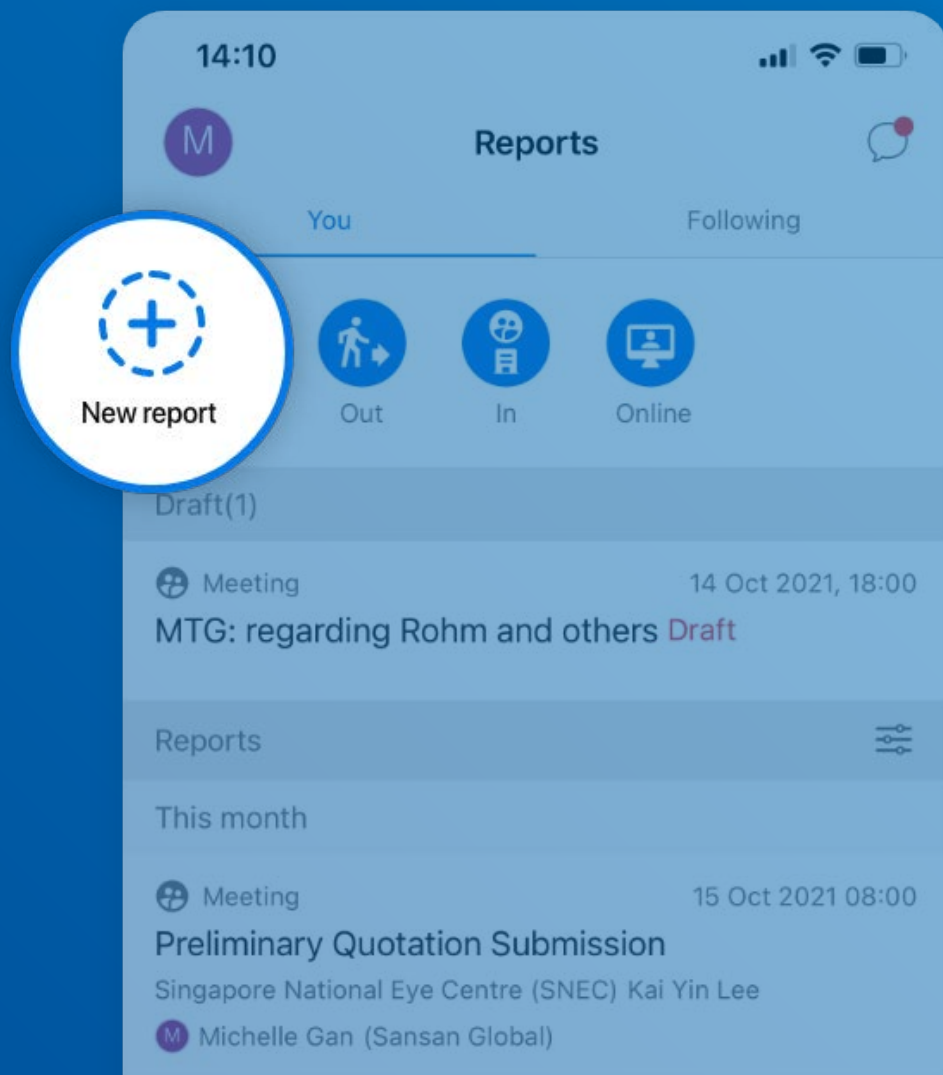


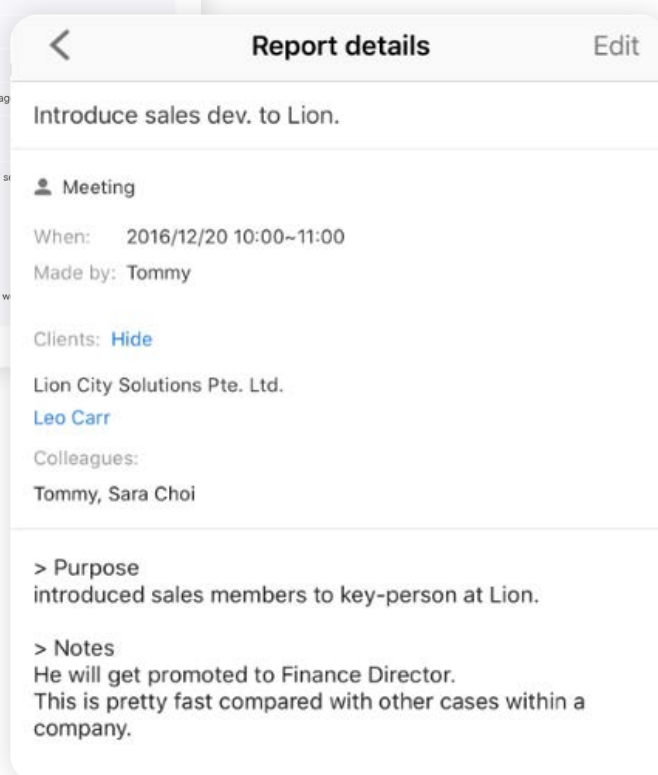
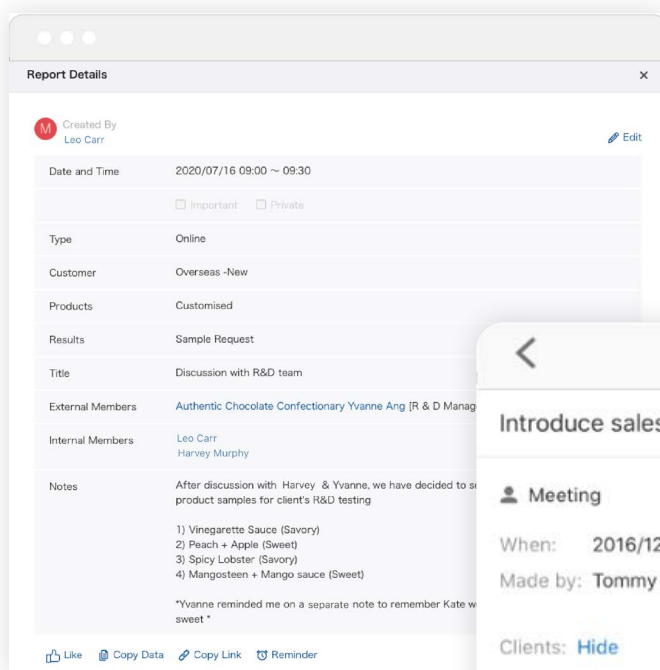
Sansan Reports

Keep track of your company's meetings and communications



What are Sansan reports?

Reports leverage your centralized contacts and centralized teams when you're all onboard with Sansan.



Benefits of using reports

Reports solve the straightforward but ever-present problem of keeping track of meetings and customers.

They integrate with your centralized connections and centralized teams so you can reference the contact and colleagues, and you can record details of your interactions.

- Always know what stage a deal's at
- Know who spoke with whom, when, and about what
- Know your company's history with a contact/client
- Revisit past negotiations and start new ones
- Hand off accounts when employees move on

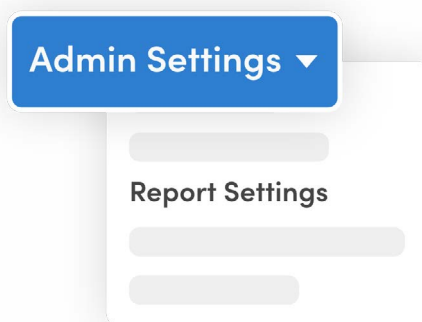


Create report

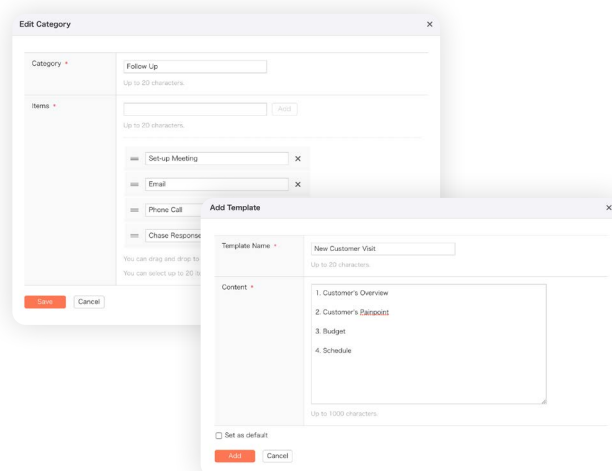
Creating categories and templates for reports

Your Sansan admin can start the reports function by setting standard formats.

1 Click on **Reports Settings** under Admin Settings.



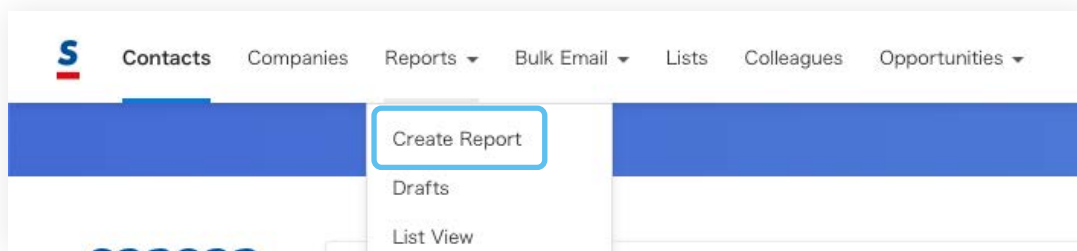
2 Create your custom categories (up to 3) and templates (up to 20).



How to create reports

Your entire team or organization can now start making, searching, and following reports.

1 From the home screen, choose **Create Report**.



2 Create a report.

1. Choose the meeting purpose, objective, and outcome.

2. Add stakeholders involved.

3. Add notes.

4. Add attachments (photos, files, videos, voice recordings, etc.).

5. Add reminders for the next actions.

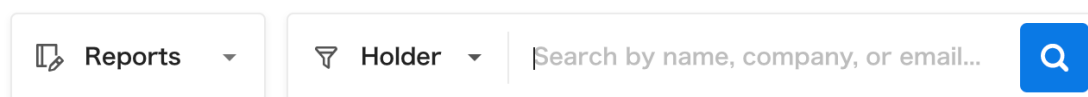
6. Forward the report to relevant colleagues.

Subject: Appointment for Demo
 Location: Ngee Ann
 Notes: New Customer Visit
 1. Customer's Overview
 2. Customer's Painpoint
 Attachment: Drag and drop files here or Select file
 Reminders: 2019/11/15 09:00
 External Members: Perry Reed, Leo Carr
 Internal Members: Sara Choi, Ethan Martinez, William Dorsey, John Smith

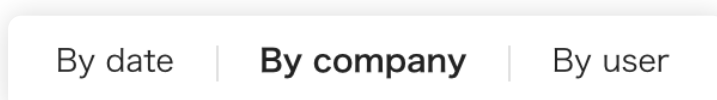
How to search for reports

Find reports and check past activity.

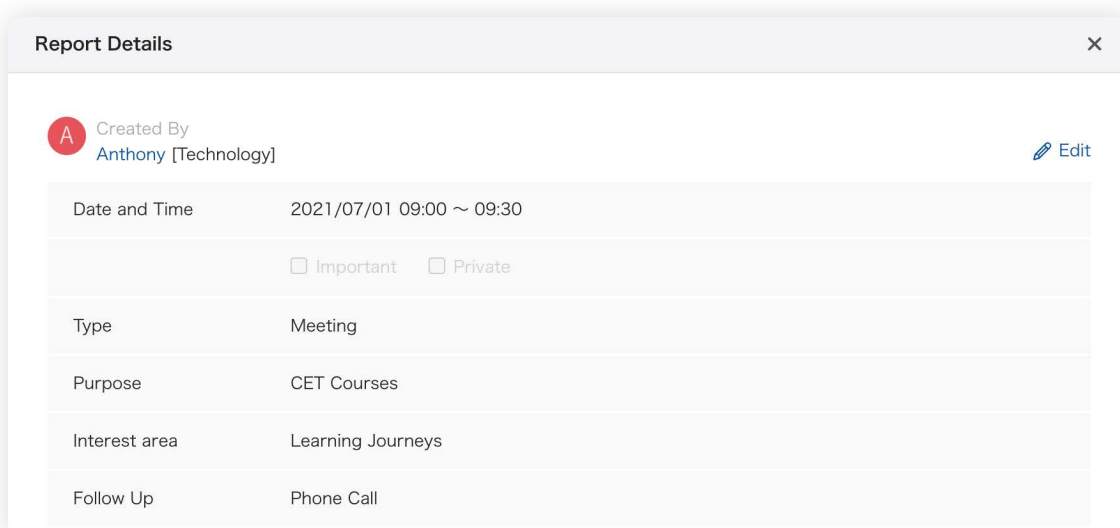
- 1 From the home screen in Sansan, choose Reports from the pulldown. Search by company or contact.



- 2 Filter results by date, company, or user.



- 3 Click on a report and view the details. Learn and take action. Like and follow-up.

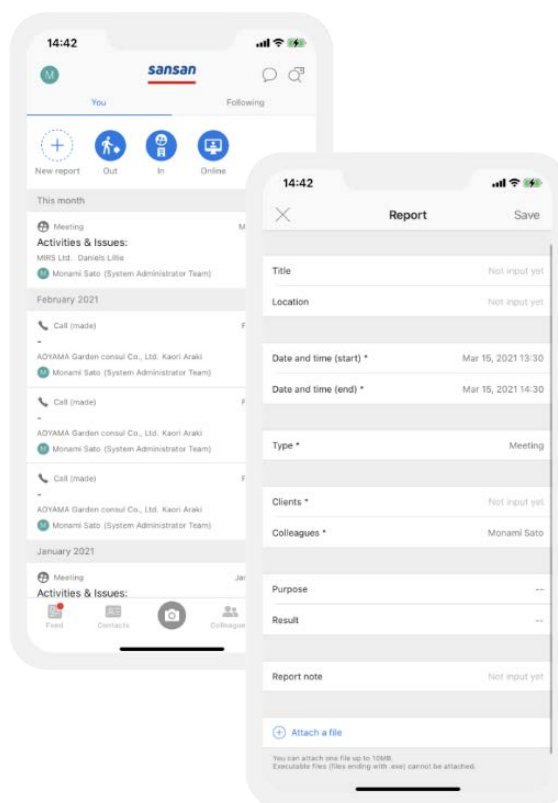


Using reports in the Mobile App

If you're on the go, you can enter in reports while they're fresh in your mind. Use your phone and the Sansan Mobile App.

1 Tap on Reports then New report.

2 Enter the details and save.



Using reports in the Mobile App

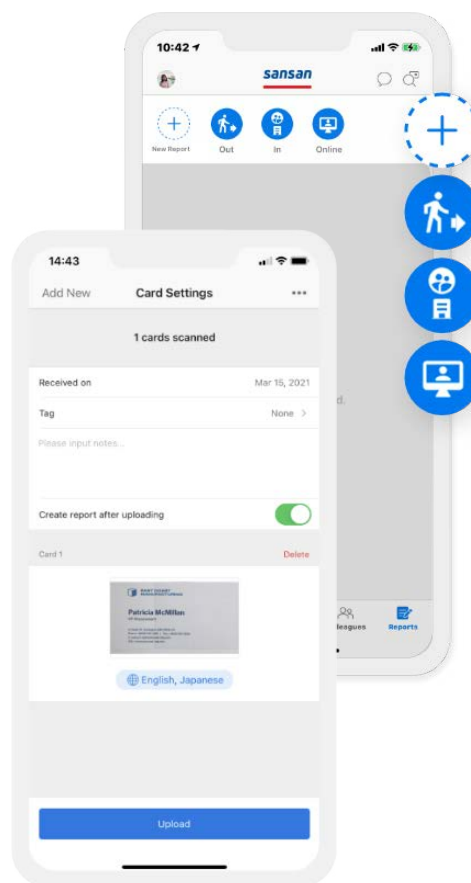
Add info such as: **date and time, type, location, internal and external attendees, purpose, result and notes.**

For notes, you can choose a template made in the Web App to quickly fill in the details.

You can also click on In, Out, or Online here to specify the type of meeting.

Create a report ASAP

When you scan a business card with the Mobile App, toggle Create report after uploading to directly open the report screen after uploading your new contact.



Using advanced search to dig deeper into report details

You can search on items such as **notes, type of communication, contacted date, or category.**

Company	<input type="text"/>
Name	<input type="text"/>
Email	<input type="text"/>
Title	<input type="text"/>
Purpose	-- <input type="button" value="v"/> Select multiple
Interest area	-- <input type="button" value="v"/>
Follow Up	-- <input type="button" value="v"/>

Notes	<input type="text"/>
Type	<input checked="" type="checkbox"/> Meeting <input checked="" type="checkbox"/> Online <input checked="" type="checkbox"/> Call <input checked="" type="checkbox"/> Email <input type="checkbox"/> Contact Since
Date Contacted	<input type="text"/> - <input type="text"/> Past 7 days/ Past 30 days/ This month/ Previous month/ All dates
Created on	<input type="text"/> - <input type="text"/> Past 7 days/ Past 30 days/ This month/ Previous month/ All dates
Other	<input type="checkbox"/> Important <input checked="" type="checkbox"/> Notes included <input type="checkbox"/> Created by a colleague you follow

If you've never used reports in your company, now's the time to try. We continue to add integrations that make them useful for maximizing your time and efficiency.

See more about Reports and other Sansan features at Sansan Academy, your Sansan mastery center.



sansan academy

BOOST YOUR SANSAN SKILLS

sansan
