

Green Sheet Reports

Last Modified on 09/15/2016 7:27 am EDT

Green Sheet- by rep - # of open activities with Green Sheets associated?

CRM Module	Custom Field	Report Type	Filter Criteria
Activities Owner Subject Priority Date Due Date Status	Associated Green Sheet Last Updated Green Sheet	Count and Total	Associated Green Sheet equals (True or Yes) Optional – Opportunity Stages do not equal “Closed Values” Status does not include “Completed”

Green Sheet – Best Action Commitment/ Minimum Acceptable Action/ Valid Business Reason – Open/ Won/ Lost

CRM Module	Custom Field	Report Type	Filter Criteria
Activities Owner Subject Priority Date Due Date	Associated Green Sheet Last Updated Green Sheet Best Action Commitment Minimum Acceptable Actions Valid Business Reason	Count and Total	Associated Green Sheet equals (True or Yes)

Green Sheet – Strengths we leverage – Open/ Won/ Lost

CRM Module	Custom Field	Report Type	Filter Criteria
Activities Owner Subject Priority Date	Associated Green Sheet Last Updated Green Sheet Credibility	Tabular or Summation Count and Total	Associated Green Sheet equals (True or Yes)

Green Sheet – Getting Information Questions - Open/ Won/ Lost

CRM Module	Custom Field	Report Type	Filter Criteria
Activities Owner Subject Priority Date	Associated Green Sheet Last Updated Green Sheet Getting Information New Information Attitude	Tabular	Associated Green Sheet equals (True or Yes)

Green Sheet – Giving Information - Open/ Won/ Lost

CRM Module	Custom Field	Report Type	Filter Criteria
Activities Owner Subject Priority Date Opportunity Name Stage	Associated Green Sheet Last Updated Green Sheet Giving Information	Tabular	Associated Green Sheet equals (True or Yes) Opportunities with Stages