

# HomecareCRM Report List

## Activities

- Marketing Plan: "What Do You Have Scheduled?"

## History

- Completed Activities by Marketer: "What Did You Do?"

## Referral Sources

- New Referring Accounts and Contacts: by Marketer
- Referring Contacts: by Line of Business and Ratings
- Referring Accounts: by Line of Business and Ratings
- Referring Account Detail Info
- Referring Contact Details

## Referrals and Admissions

- New Referrals: by Marketer by Month
- Referrals and Admissions: by Marketer
- Referrals and Admissions: by Referring Account
- Referrals and Admissions: by Referring Account and Contact

## Ratings

- Ratings: Referring Account Ratings by Marketer
- Ratings: by Referring Account
- Ratings: by Referring Contact

## Conversion Ratio

- Conversion Ratio: by Referring Account and Contact
- Conversion Ratio: by Marketer

## Conversion Rates

- Referral-to-Admission Times: by Marketer
- Referral-to-Admission Times: by Line of Business
- Referral-to-Admission Times: by Referring Account

## Quotas

- Quotas vs. Actual: Referral and Admissions

## Expenses

- Marketer/User Weekly Expense Report
- Approved Expenses by Marketer/User
- Expenses: by Marketer/User
- Expenses: by Account
- Expenses: by Expense Type