



Teessen Consulting

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TC CommSplit: how to create an Analysis report

Elsabe van der Merwe

Teessen Consulting

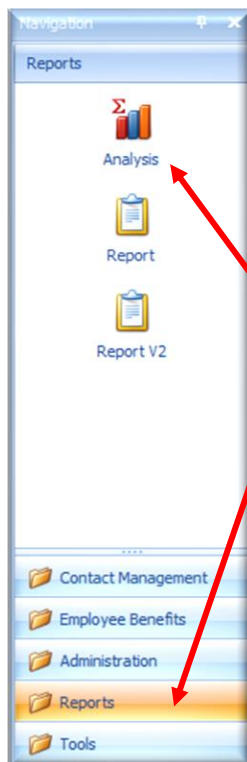
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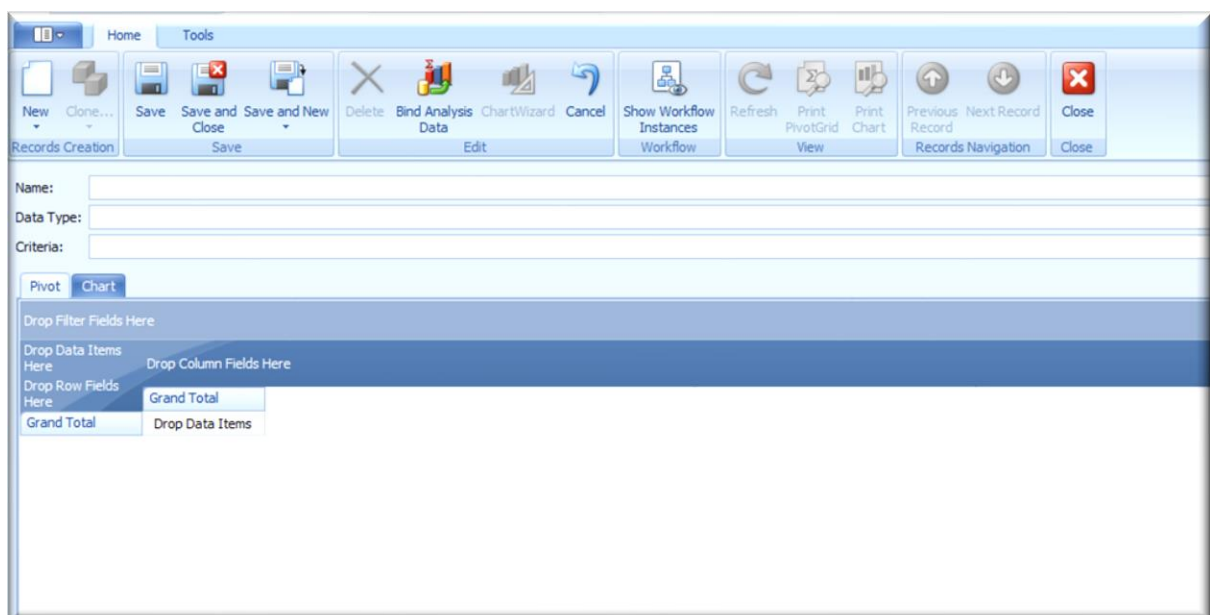
How to create an Analysis report

You are able to analyse your data on every field captured.

Go to Reports on the Navigation bar and then Analysis:



In order to create a new Analysis report, select New from the task bar:





Create a Name for your report:

Data Type: On the drop down menu you will see all the types of data on which you can do reporting. For this example we are going to use the Person data type.

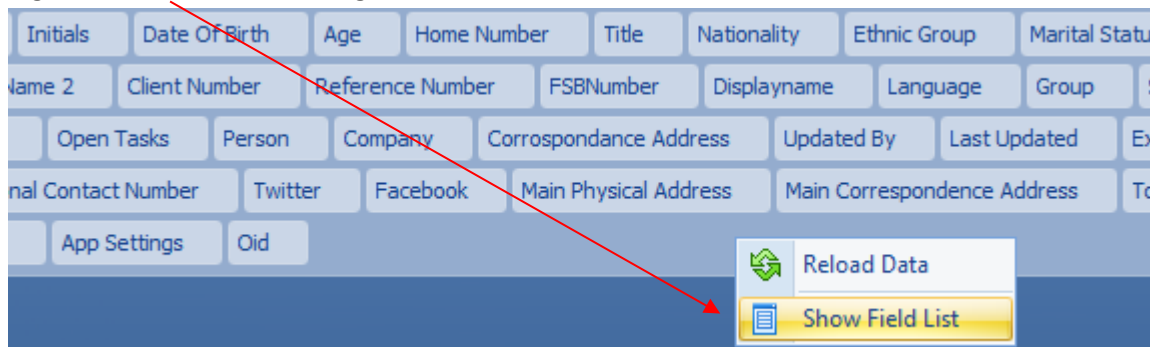


After selecting the data type you need to 'Bind the data' which will then return all fields in the system which may be used on this data type:

The screenshot shows a web-based report configuration interface. At the top, there are input fields for 'Name:', 'Data Type: Person', and 'Criteria:'. Below these is a 'Pivot' tab with a 'Chart' sub-tab. A large grid of fields is displayed, including: First Name, Second Name, Call Name, Surname, Initials, Date Of Birth, Age, Home Number, Title, Nationality, Ethnic Group, Marital Status, Is Male, IDNumber, Passport Number, Maiden Name, Occupation, Religion, Employer, Legal Reference, Name 1, Name 2, Client Number, Reference Number, FSBNumber, Displayname, Language, Group, Source, Work Number, Fax Number, Cell Number, Email, Contact Type, Primary Record, Consultant, Picture, Open Tasks, Person, Company, Correspondance Address, Updated By, Last Updated, External ID, Change Indicator, Salutation, VATNumber, Tax Number, Created By, Date Created, Additional Email, Additional Contact Number, Twitter, Facebook, Main Physical Address, Main Correspondance Address, Total Contract Value, Total Contract Premium, Total Contract Commission, XMLProperty Stream, Owner Description, Context Type, App Settings, and Oid. Below the field grid are sections for 'Drop Data Items Here', 'Drop Row Fields Here', 'Drop Column Fields Here', and 'Grand Total'.

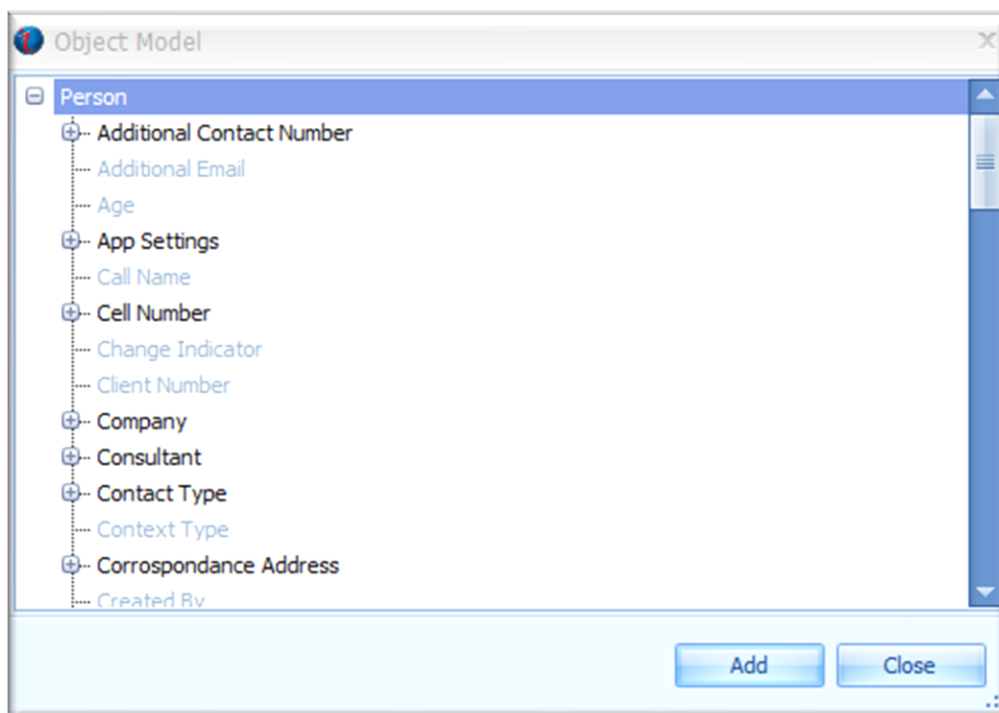
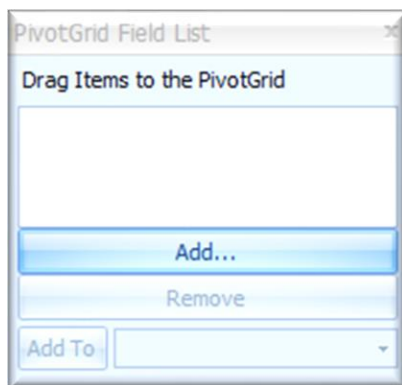
If there are specific data you would like to report on which does not display on these headings, you may select other or more options from the Field list feature.

Right click next to the headings and select Show Field list



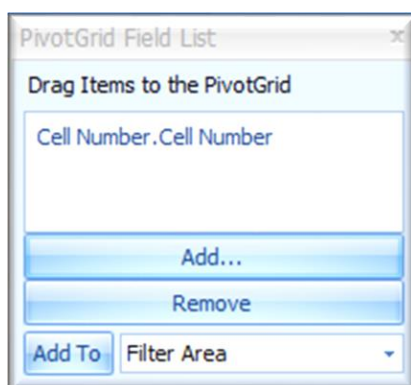
An additional screen will pop-up from which you may make your selection.

Click on add to show the Object model tree:



You will notice that some of the entries are greyed out. These records are already available on the main screen.

After you have selected the required field/s, it will display in the pop-up screen.





Drag and drop the required field/s onto the report on the “Drop Data Items Here” section:

Drop Data Items Here

Drop Column Fields Here

Grand Total

Grand Total

Drop Data Items

Displayname	IDNumber	Employer	Email	Cell Number	Group
A J Coy Trust Unknown (U.)					ABC Group - Coastal
ACKERMAN ANNELISE (A)	9112050048085	Travel with Flair		2779510884	Employee Benefits
Adams Benje (B T)	410604123410				ABC Group - Coastal
ADAMS SJ (S J)	7308025238080	Profert (Pty) ...			Employee Benefits
Africa Faith (F)	520118123481				Ralf Gerber & Associates
Alberts Ursula (U U)	480401123487			2784719555	Ralf Gerber & Associates
Alberts Ursula (U)	480401123486				ABC Group - Coastal
Algar Helen (H R)	371113123485		info@tconsul...		Ralf Gerber & Associates
Algar Owen (O J)	360415123480				Ralf Gerber & Associates
ALLAH LINDA (L)	8405110970087	Travel with Flair		2778476578	Employee Benefits
Allem Marie (M K)	350924123487				Ralf Gerber & Associates
Ambrose Mark (M)	8003145208084			0795028473	Pioneer
Anderson Jonathan (J.M.)	560427123487	Prestedge Re...			Ralf Gerber & Associates

From this data we can now determine the completeness of our client data.

You may use the criteria field to segment the data you want to report on:

Name:

Data Type:

Criteria:

Edit Criteria

Visual Text

And

[Owner.Group] Equals Employee Benefits

OK Cancel



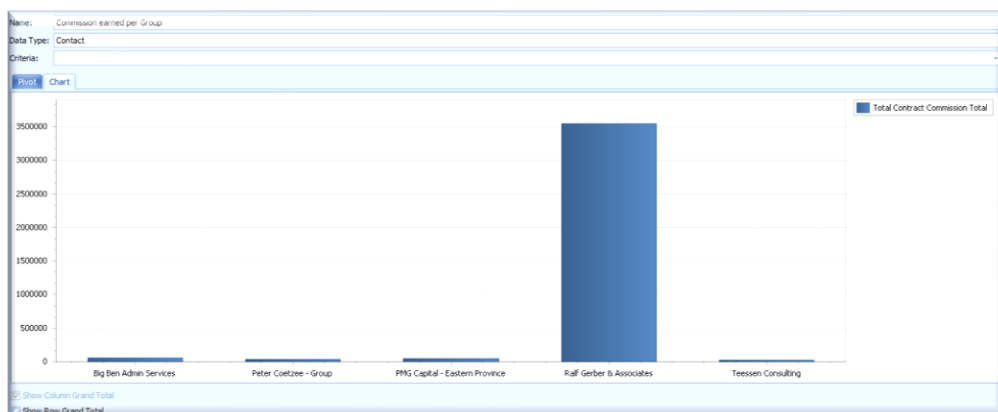
When using a value in your report the system also automatically creates a Chart with the criteria selected:

Name: Commission earned per Group
Data Type: Contact
Criteria:

Pivot Chart

Legal Reference	Name 1	Name 2	Client Number	Reference Number
Open Tasks	Correspondance Address	Updated By	Last Updated	External
Main Physical Address	Main Correspondence Address	Owner Description	App S	

Total Contract Commission	Drop Column Fields Here
Group	Total Contract ...
Big Ben Admin Services	R 52 933.78
Peter Coetzee - Group	R 28 581.15
PMG Capital - Eastern Province	R 46 423.19
Ralf Gerber & Associates	R 3 545 146.97
Teessen Consulting	R 19 189.18
Grand Total	R 3 692 274.28





Export this report in various formats:

