# Reports

Get a clear view of your business performance with CRM analytics covering revenue, pipeline health, team activities, and sales conversion — all in one place.

## Key Features

- **Time Period Filter**: Switch between 7 days, 30 days, 90 days, or 1 year to focus on the timeframe that matters
- **Overview Dashboard**: Eight key metrics at a glance — revenue collected, outstanding invoices, new accounts, new projects, win rate, average deal size, activities logged, and won/lost counts
- **Revenue Report**: Monthly revenue bar chart with breakdowns by top accounts (top 10) and project type
- **Pipeline Report**: See all active projects by stage (Proposed, Contracted, Planning, In Production, On Hold), broken down by project type, with an upcoming 90-day timeline and an aging list that flags stale items
- **Activities Report**: Track daily activity volume, task completion rate, activity types, and which accounts are getting the most attention
- **Conversion Report**: Monitor your quote funnel (sent → accepted → declined), contract

signing rate, average days to close, and monthly conversion trends over 12 months

## How to Use

1. Open the **Reports** page from the sidebar
2. Select a **time period** using the buttons at the top (7 Days, 30 Days, 90 Days, 1 Year)
3. Click a **report tab** — Overview, Revenue, Pipeline, Activities, or Conversion — to switch views
4. Review the charts and tables; the page updates instantly when you change the period or tab

## Tips

- Start with **Overview** to get a quick health check on your business before diving into specifics — the win rate circle gives you an instant read on project outcomes
- The **Pipeline** report highlights an aging list — any project sitting in Proposed or Planning status for more than 30 days is flagged in red, so you know where to follow up
- Use the **Pipeline upcoming timeline** to see which projects are scheduled to start in the next 90 days and plan your workload accordingly
- Use **Activities** to spot quiet periods and make sure key accounts are getting consistent attention
- The **Conversion** report's monthly trend table shows your quote acceptance rate over time, making it easy to see if your close rate is improving
- Revenue breakdowns by account and project type help you identify your most profitable client segments