



Reports Manual

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1.0 Introduction

This guide has been created to explain how the reports tool works in your 360 Lifecycle system.

The 360LC reports give you the control to effectively manage and control your business and its needs. Quickly and easily report on your company's written business, see what is in your pipeline and even query your completed business to your NPW'd.

All reports can be selected by individual or groups of people, introducers and by day, month year or time specified.

1.1 Getting Started

Begin by double clicking on the Office icon which should be located on your desktop.

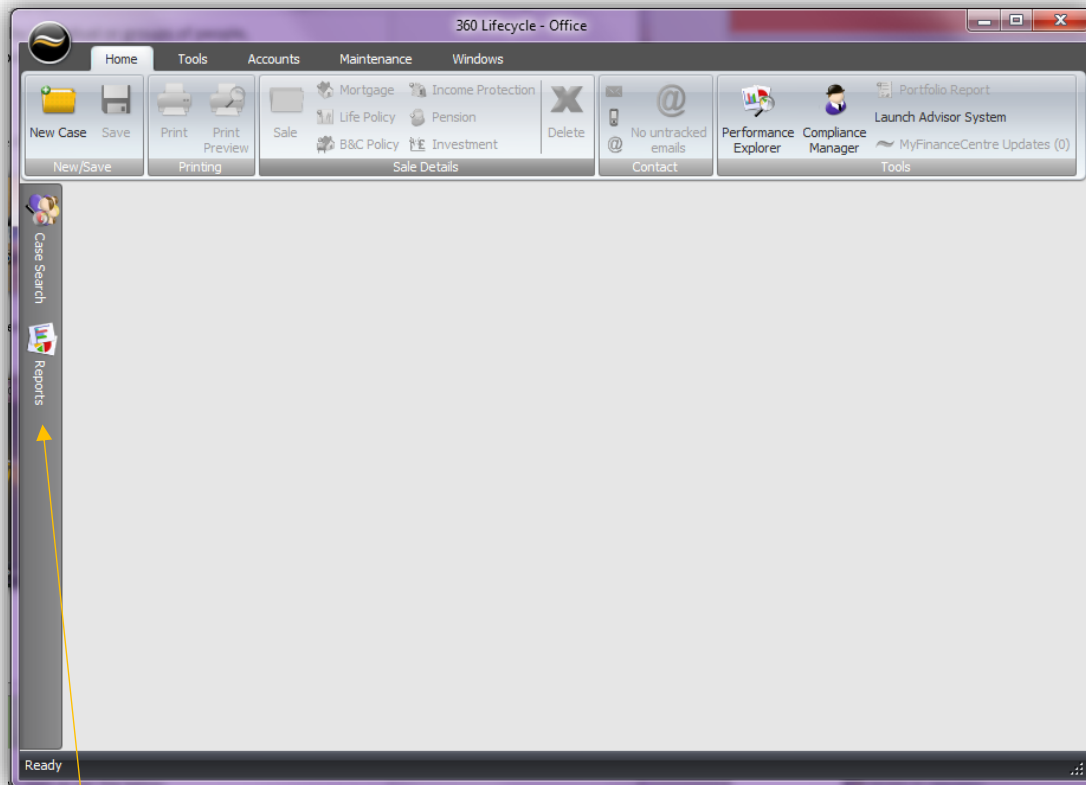


The 360 Lifecycle system login screen will open. Enter your credentials and select 'Login'.



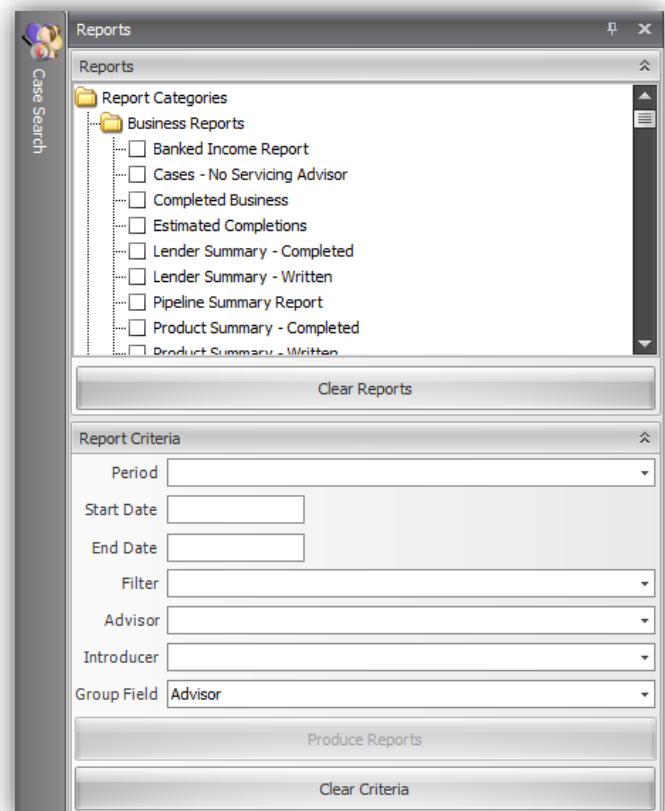
Reports

The Office landing page will now open as per the below;



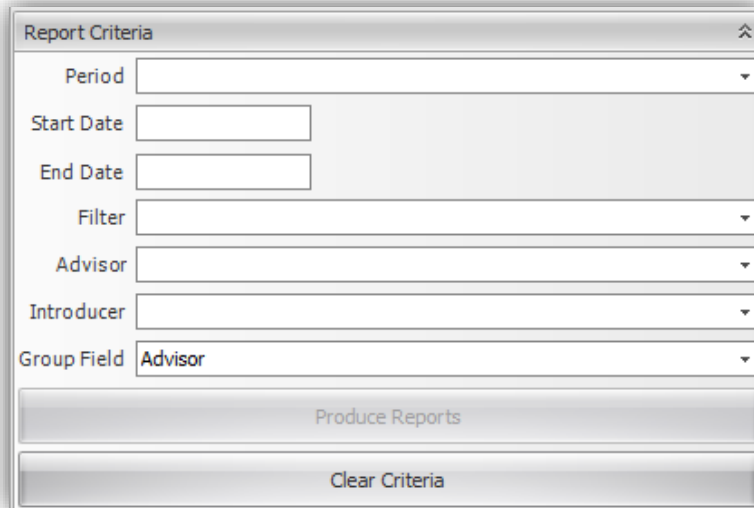
The **'Reports'** tool is located along the left hand side of the Office landing page screen.

Click on the icon to view the list of reports available for you to run.



2.0 Report Criteria

The report criteria of the Reports tool lets you drill down right to the specifics of what it is you are wanting to see. You can add as little or as much to the Report Criteria section as you wish.

The image shows a screenshot of a software dialog box titled "Report Criteria". It contains several input fields: a "Period" dropdown menu, "Start Date" and "End Date" text boxes, a "Filter" dropdown menu, an "Advisor" dropdown menu, an "Introducer" dropdown menu, and a "Group Field" dropdown menu currently set to "Advisor". At the bottom of the dialog are two buttons: "Produce Reports" and "Clear Criteria".

- **Period** – lets you select a pre-defined system period that you want results returned for.
- **Start Date/End Date** – here you can enter your own custom start & end date that you want results returned for.
- **Filter** – This drop down lets you select a specific advisor group to run a report for. These groups are determined from the set-up of your company's user access group hierarchy.
- **Advisor** – Here you can select a specific advisor in your company to run a report for. This advisor has to be in your company's user access group hierarchy. You can use this option without having to select an option from the 'Filter' drop down menu.
- **Introducer** – If you have introducers set up on your database you can use this drop down menu to return cases and policies specific to that introducer.
- **Group Field** – this drop down lets you choose whether you wish to group the report ran by Advisor, Introducer, Negotiator, Provider or even Event Type.

3.0 Running Your Report

Running a report is as simple as ticking the box of the report you wish to run, selecting the report criteria as discussed in section 2.0 and clicking on **'Produce Reports'**.

The screenshot above gives an example of how you may run a report. Based on the 'Completed Business' selected returned

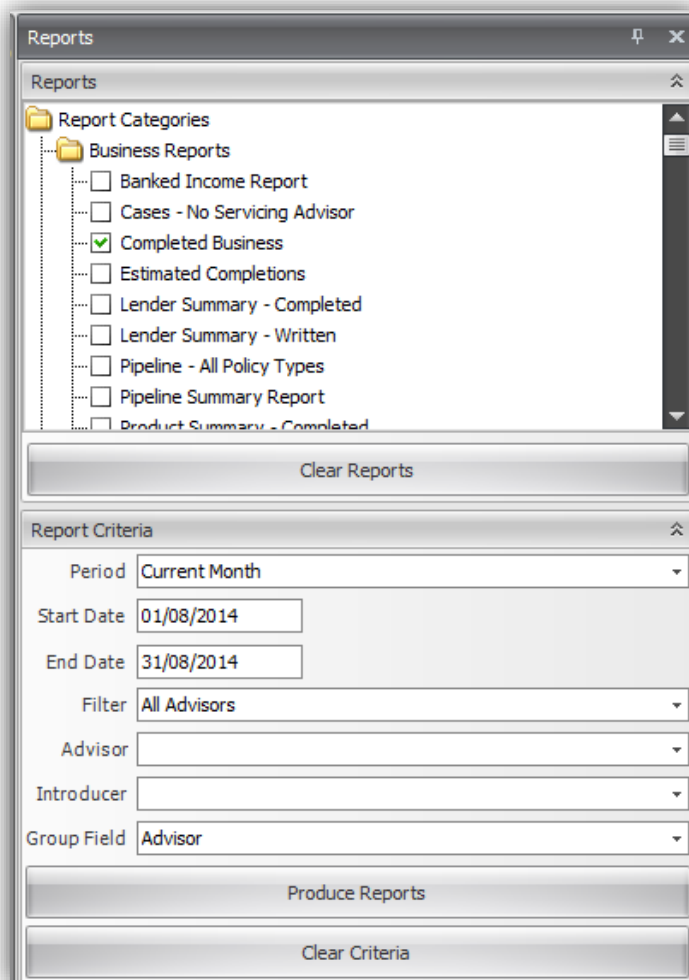
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Refer to section 4.0 for specific details on each report.



screenshot an example may run a Based on the 'Completed Business' report being the report will show:

business completed in current month, for all advisors in company, grouped by advisor themselves.

section 4.0

4.0 Report Specifics

Business Reports:

- 1) **All Policy Types – Completed** - Shows a complete list of all policies that have a Mortgage completion date, a Life authorisation date and start date for Income Protection, General Insurance, Pension and Investments
- 2) **All Policy Types – Written** - Shows a complete list of all individual policies which have a 'created date' between the period you are running the report for.

- 3) **Banked Income Report.** The banked income report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for.

NB: This report requires a company to actively be using the Accounts tool.

- 4) **Cases No Servicing Advisor.** This report returns all cases in the system which do not have a servicing advisor saved to it. The report will list the last advisor who created an opportunity or sale event (if there is one) to the case record as an indication to you who may be the Servicing Advisor.

NB: This report cannot be filtered by period.

- 5) **Completed Business.** Completed business reports return all policies where the completed date is within the period selected in the report criteria. The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

- 6) **Estimated Completions.** This report will return all policies where the estimated completion, as entered into the '**Estimated Completion**' section of a sale event, is within the period selected in the report criteria.

- 7) **Lender Summary – Completed.** This report will return a mortgage lender summary for all mortgages where the '**Completion Date**' is within the same period selected in the report criteria.

- 8) **Lender Summary – Written.** This report will return a mortgage lender summary for all mortgages where the '**Created Date**' is within the same period selected in the report criteria.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

- 9) **Pipeline – All Policy Types** – Shows a complete list of all policies that have the same status as one selected in 'Pipeline Report Settings'. Please contact the 360 DotNet support to discuss your pipeline settings if required.

10) **Pipeline Summary Report.** This report returns all policies that have the same status as one selected in 'Pipeline Report Settings', found in the maintenance section of 360LC Office.

NB: Pipeline Report Settings are a management tool and not all users may have access to this section of the system. The report also cannot be queried based on a period.

11) **Product Summary – Completed.** This report shows a product summary of all policies which have been completed within the same period selected in the report criteria. The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

12) **Product Summary – Written.** This report will return a product summary for all policies where the '**Created Date**' is within the same period selected in the report criteria.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

13) **Product Summary By Provider – Completed.** This report shows a product summary by provider of all policies which have been completed within the same period selected in the report criteria. The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

14) **Product Summary By Provider – Written.** This report shows a product summary by provider of all policies which have been created in the same period selected in the report criteria.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

15) **Written Business** – Shows a complete list of all policies created within the same period selected in the report criteria.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

League Table Reports:

- 1) Banked Income League** - The banked income league report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for. This reports differs from the Banked Income Report in that it also shows advisor splits.

NB: This report requires a company to actively be using the Accounts tool.

- 2) Banked Income League – Filtered** - The banked income league report returns the total amount of commission paid into the system for each advisor, split by commission type. Results here are based on the 'received' date of a banking receipt matching the period you are running the report for.

Unlike the banked income league report you can filter this report for different advisors and groups.

This reports differs from the Banked Income Report in that it also shows advisor splits.

NB: This report requires a company to actively be using the Accounts tool.

- 3) Completed Business League** - Completed business reports return all policies where the completed date is within the period selected in the report criteria. This reports differs from the Completed Business report in that it also shows advisor splits.

The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

- 4) Completed Business League – Filtered** - Completed business reports return all policies where the completed date is within the period selected in the report criteria. This reports differs from the Completed Business report in that it also shows advisor splits.

Unlike the completed business league report you can filter this report for different advisors and groups.

The completed date for each policy is based on the following:

- Mortgages – Completed date is based on the **Completion Date** of the mortgage policy. If there is no completed date entered on the mortgage then the report will be ran based on the **Exchanged Date** of the policy.
- Life policies – Completed date is based on the **Authorisation Date** of the life policy.
- B&C/Income Protection/Pensions/Investments – Completed date is based on the **Start Date** of each policy.

- 5) Written Business League** – Shows a complete list of all policies created within the same period selected in the report criteria and includes advisor splits.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

- 6) Written Business League - Filtered** – Shows a complete list of all policies created within the same period selected in the report criteria and includes advisor splits. Unlike the written business report you can filter this report for different advisors and groups.

NB: The Created Date is not viewable on a policy screen in the system but is determined from when the case is created on 360LC.

Commission Reports:

- 1) Admin Fees Collected** - Shows all admin fees for a mortgage where the fee has not been waived and money has been banked within the report filter criteria.

NB: This report requires a company to actively be using the Accounts tool.

- 2) Admin Fees Completed** – Shows all banked admin fees where a mortgage's completion date is within the report criteria.

NB: This report requires a company to actively be using the Accounts tool.

- 3) Admin Fees Written** – Shows all admin fees where a mortgage created date is within the report criteria.

- 4) Aged GI Commission** – Shows all general insurance policies in the system that have unsatisfied commission.

- 5) Aged Life Commission** – Shows all life policies in the system that have unsatisfied commission.

- 6) Aged Procs** – Shows all mortgage policies that have unsatisfied commissions

- 7) Banking Details** – Shows all payments that have been banked into the system within the report criteria you are searching for.

- 8) Banking Details (Filtered with Splits)** - Shows all payments, including adviser splits that have been banked for the report criteria you are searching for including all filters which have been entered. Example Filter, Adviser, Introducer.

- 9) Banking Details With Splits** – Shows all payments, including advisor splits, that have been banked into the system within the report criteria you are searching for.

- 10) Banking Receipt List** – Shows all banking's where the Banking Receipt received date is between the report criteria being searched for.
- 11) Clawback Liability Report** – Estimates the current clawback liability for Life and Income Protection policies against an adviser/business based on either a 24 or 48 month clawback period. *For Life policies; this report is generated provided that the relevant date has been added to the 'Authorised' field and an 'On Risk' status has been applied and for Income Protection policies, this report is generated provided that the 'Start Date' has been added and an 'On Risk' status has been applied*
- 12) Clawback Report** - Shows all policies where a minus 'claw back' entry has been added to a banking receipt within the Accounts subscription.
- 13) Incorrect Proc Fees** – Shows all mortgages with an unsatisfied Proc fee where the amount banked does not match the Proc fee expectation. Mortgages have to have a completion date to appear in this report.
- 14) Mortgages Written – No Proc Fee** – Shows all mortgages where the created date of that mortgage is within the report criteria you are searching for, that do not have a Proc fee expectation saved to them.
- 15) Outstanding Admin Fees** – Shows all mortgages which have either a completed or exchanged date (within the report criteria you are searching for) that does not have satisfied admin fees. Commissions can be manually satisfied to remove them from this list.
- 16) Outstanding Commission** – Shows all policies where a commission expectation has not been satisfied and the policy completed date is within the report search criteria. For policies to appear in this list the following dates must be entered:
- Mortgages – must have completion date entered
 - Life – must have authorised date entered
 - Income Protection/B&C/Investment/Pension – must have a start date entered
- Commissions can be manually satisfied to remove them from this list.
- 17) Outstanding GI Commission** – Shows all GI policies where the commission expectation has not been satisfied and the GI policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria.
Commissions can be manually satisfied to remove them from this list.
- 18) Outstanding Income Protection Commission** – Shows all income protection policies where the commission expectation has not been satisfied and the income protection policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria.

Commissions can be manually satisfied to remove them from this list.

19) Outstanding Investment Commission – Shows all Investment policies where the commission expectation has not been satisfied and the investment policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria.

Commissions can be manually satisfied to remove them from this list.

20) Outstanding Life Commission – Shows all life policies where the commission expectation has not been satisfied and the life policy is completed. This completed date is based on the policy 'Auth Date' and must be within the same time period being searched for in the report criteria.

Commissions can be manually satisfied to remove them from this list.

21) Outstanding Pension Commission – Shows all pension policies where the commission expectation has not been satisfied and the pension policy is completed. This completed date is based on the policy 'Start Date' and must be within the same time period being searched for in the report criteria.

Commissions can be manually satisfied to remove them from this list.

22) Outstanding Procs (Completed) - Shows all mortgages with a completion date between the dates you are running the report for where the proc commission expectation has not been satisfied.

Commissions can be manually satisfied to remove them from this list.

23) Outstanding Procs (Exchanged) - Shows all mortgages with an exchanged date between the dates you are running the report for where the proc commission expectation has not been satisfied. Commissions can be manually satisfied to remove them from this list.

24) Outstanding Unsatisfied Procs - Shows all Proc Fee expectations where the commission has not been satisfied. This does not take into account any payments received and solely reports off whether the expectation is satisfied or not.

25) Pipeline Commission - Shows all cases where the commission expectation has not been satisfied.

Mortgage Reports:

1) Expiring Mortgage Offers- Shows all mortgages where the mortgage offer is due to expire within the report criteria you are searching for. This report is generated based on

completing the 'Expiry' field on the mortgage screen within the 360 Lifecycle case record.

- 2) **Mortgage Pipeline** – Shows all mortgages with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 3) **Mortgage Completed** – Shows all mortgages with a completed date within the report criteria you are searching for.
- 4) **Mortgage Exchanged** – Shows all mortgages with an exchanged date within the report criteria you are searching for.
- 5) **Mortgages Written** – Shows all mortgages that have been created within the report criteria you are searching for. This report could return mortgages that have also been completed.
- 6) **Mortgages Written – Not Completed** – Shows all mortgages that have been created within the report criteria you are searching for but do not have a completion date entered.
- 7) **Mortgages Written – Not Offered** – Shows all mortgages that have been created within the report criteria you are searching for but do not have an offered date entered.
- 8) **Mortgages Written – No GI**– Shows all mortgages that have been created within the report criteria you are searching for but do not have a GI policy within the same sale event.
- 9) **Mortgages Written – No Life**– Shows all mortgages that have been created within the report criteria you are searching for but do not have a Life policy within the same sale event.
- 10) **Remortgage Campaign** – Shows all mortgages where either the penalty end date or mortgage end date is in the same time frame being searched for in the report criteria.

Life Reports:

- 1) **Income Protection Completed** – Shows all income protection policies with a start date within the report criteria you are searching for.

- 2) **Income Protection NPW's** – Shows all income protection policies with a status of NPW'd where the status changed date is within the report criteria you are searching for.
- 3) **Income Protection Pipeline** – Shows all income protection policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 4) **Income Protection Written** – Shows all income protection policies that have been created in the same time period as you are running the report for. This report could also return completed income protection policies if they have been completed in the same time period.
- 5) **Life Completed** – Shows all life policies with an Authorised date within the date criteria you are running the report on.
- 6) **Life Outstanding** – Shows all life policies with an Authorised date within the date criteria you are running the report on.
- 7) **Life Pipeline** – Shows all life policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 8) **Life Ready** - Shows all life policies with 'Ready' ticked on the policy record.
- 9) **Life Written** - Shows all life policies that have been created in the same time period as you are running the report for. This report could also return completed life policies if they have been completed in the same time period.
- 10) **Replacement Life (Completed)** – Shows all life policies where 'Replacing Previous Policy' is selected on the policy record and a life authorised date has been entered. Cases returned will be where the life auth date is within the date criteria you are running the report for.
- 11) **Replacement Life (Written)** – Shows all life policies where 'Replacing Previous Policy' is selected on the policy record and the created date of the policy is within the date criteria you are running the report for.

GI Reports:

- 1) **GI Completed** – Shows all GI policies with a start date within the report criteria you are searching for.

- 2) **GI Pipeline** – Shows all GI policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 3) **GI Written** - Shows all GI policies that have been created in the same time period as you are running the report for. This report could also return completed GI policies if they have been completed in the same time period.

IFA Reports:

- 1) **Investment Pipeline** – Shows all Investment policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 2) **Investments Completed** – Shows all Investment policies with a start date within the report criteria you are searching for.
- 3) **Investments Written** - Shows all Investment policies that have been created in the same time period as you are running the report for. This report could also return completed Investment policies if they have been completed in the same time period.
- 4) **Pension Pipeline** – Shows all Pension policies with a status as set up in your system pipeline settings. This report is not based on date. To amend your pipeline settings you must have the system administrator role.
- 5) **Pensions Completed** – Shows all Pension policies with a start date within the report criteria you are searching for.
- 6) **Pensions Written** - Shows all Pension policies that have been created in the same time period as you are running the report for. This report could also return completed Pension policies if they have been completed in the same time period.

Referral Reports:

- 1) **B&C Referrals – Completed** – Shows all GI policies which have a referring advisor and a start date within the report criteria you are searching for.

- 2) **B&C Referrals – Written** – Shows all GI policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed GI policies if they have been completed in the same time period.
- 3) **Income Protection Referrals – Completed** – Shows all Income Protection policies which have a referring advisor and a start date within the report criteria you are searching for.
- 4) **Income Protection Referrals – Written** – Shows all Income Protection policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Income Protection policies if they have been completed in the same time period.
- 5) **Investment Referrals – Completed** – Shows all Investment policies which have a referring advisor and a start date within the report criteria you are searching for.
- 6) **Investment Referrals – Written** – Shows all Investment policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Investment policies if they have been completed in the same time period.
- 7) **Life Referrals – Completed** – Shows all Life policies which have a referring advisor and an authorisation date within the report criteria you are searching for.
- 8) **Life Referrals – Written** – Shows all Life policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Life policies if they have been completed in the same time period.
- 9) **Mortgage Referrals – Completed** – Shows all Mortgage policies which have a referring advisor and either a completion date or exchanged date within the report criteria you are searching for.
- 10) **Mortgage Referrals – Written** – Shows all Mortgage policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Mortgage policies if they have been completed in the same time period.
- 11) **Opportunity Referrals** – Shows all sales opportunities referred between advisers within the report criteria you are searching for where there is an Adviser and a Referring Adviser showing on the case record.
- 12) **Pension Referrals – Completed** – Shows all Pension policies which have a referring advisor and a start date within the report criteria you are searching for.

13) Pension Referrals – Written – Shows all Pension policies which have a referring advisor and that have been created in the same time period as you are running the report for. This report could also return completed Pension policies if they have been completed in the same time period.

Compliance Reports:

- 1) **Amended Commissions** – Shows details of any commission changes on a case record within the 'Commission & Payments' tab. This includes details such as the previous commission, new commission, who the commission was changed by.
- 2) **Duplicate Clients** – Shows all cases where clients have the same forename, surname, postcode and date of birth.
- 3) **Fast Track Mortgages** – Shows all mortgage policies where 'Fast Track' is selected on the mortgage record and the created date of the policy is within the same time period you are running the report for.
- 4) **Interest Only Mortgages** - Shows all mortgage policies where the repayment method is 'Interest Only' and the created date of the policy is within the same time period you are running the report for.
- 5) **Mortgages Going Into Retirement** – Shows all mortgages where the owner is going into retirement. An assumptive retirement age of 65 has been made for the purpose of this report.
- 6) **Mortgages With Term > 25 Years** - Shows all mortgages with a term greater than 25 years where the created date of the policy is within the same time period you are running the report for.
- 7) **NPW Buildings & Contents** - Shows all GI policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 8) **NPW Life** - Shows all Life policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 9) **NPW Mortgages** - Shows all Mortgage policies where the policy status is NPW and the status changed date is within the same criteria you are running the report for.
- 10) **Self Cert Mortgages** – Brings up all mortgages where the 'Self Cert' tick box is selected on the mortgage record and the policy was created within the same time period you are running the report for.

- 11) Time To Offer (Administrator)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the 'To Lender' date on the mortgage record and the mortgage offer date is based on the 'Mortgage Offer' date on the mortgage record. This report is based on the administrator of the sale which is taken from the 'Case Owner' on the sale event details.
- 12) Time To Offer (Advisor)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the 'To Lender' date on the mortgage record and the mortgage offer date is based on the 'Mortgage Offer' date on the mortgage record. This report is based on the advisor of the sale.
- 13) Time To Offer (Lender)** – Calculates the time it takes a mortgage policy offer to come through once the application has been submitted to the lender. The submitted date is based on the 'To Lender' date on the mortgage record and the mortgage offer date is based on the 'Mortgage Offer' date on the mortgage record. This report is based on the lender of the mortgage policy.

Activity Reports:

- 1) Appointments Booked** – Shows all appointments which have been created within the same time period you are running the report for.
- 2) Appointments Seen** – Shows all appointments, which have not been DTU'd or cancelled, where the appointment date is within the same time period you are running the report for.
- 3) First Appointments Booked** – Shows all first appointments of a sale opportunity where the created date is within the same time period you are running the report for.
- 4) First Appointments Seen** – Shows all first appointments of a sale opportunity where the appointment date is within the same time period you are running the report for.
- 5) Negotiator Appointments Booked** – Shows all appointments booked by a negotiator where the created date is within the same time period you are running the report for.
- 6) Negotiator Appointments Seen** – Shows all appointments booked by a negotiator where the appointment date is within the same time period you are running the report for.

- 7) **Negotiator First Appointments Booked** – Shows all first appointments of a sale opportunity which have been booked by a negotiator and the created date is within the same time period you are running the report for.
- 8) **Negotiator First Appointments Seen** – Shows all first appointments of a sale opportunity which have been booked by a negotiator and the appointment date is within the same time period you are running the report for.

Negotiator Reports:

- 1) **Mortgages Completed** – Shows all mortgages which have a negotiator saved to the sale event details as well as either a mortgage completion date or mortgage exchanged date within the same time period you are running the report for.
- 2) **Mortgages Written** – Shows all mortgages which have a negotiator saved to the sale event details where the mortgage created date is within the same time period you are running the report for.

Client Contact Reports:

- 1) **ATR Questionnaires sent** – Shows all ATR Questionnaires sent from a case record within the report criteria you are searching for. This report will also show whether the ATR Questionnaire has been received and gives you the ability to view/open the questionnaire directly from the report.
- 2) **Missing Email Addresses** – Shows all clients without an email address on a case record.
- 3) **Questionnaires Outstanding** – Shows all outstanding TCF questionnaires where the questionnaire sent date is within the same time period you are running the report for.
- 4) **Questionnaires Received** – Shows all TCF questionnaires which have been received within the same time period you are running the report for.
- 5) **Questionnaires Sent** – Shows all TCF questionnaires where the sent date is within the same time period you are running the report for.
- 6) **SMS Messages Sent** – Shows all SMS sent from the system along with a status of whether they were sent successfully or not.