

PeopleSoft®

PeopleSoft EnterpriseOne CRM Sales Applications 8.11 Reports

November 2004

PeopleSoft EnterpriseOne CRM Sales Applications 8.11 Reports
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Contents

Reports Preface

- About This PeopleBook Prefacev**
- Documentation Updates and Printed Documentation.....v
 - Obtaining Documentation Updates.....v
 - Ordering Printed Documentation.....v
- Comments and Suggestions.....vi

Chapter 1

- PeopleSoft EnterpriseOne CRM Sales Application Reports.....1**
- PeopleSoft EnterpriseOne CRM Sales Application Reports: A to Z.....1

Chapter 2

- Report Samples.....7**

About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

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- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft EnterpriseOne CRM Sales Application Reports

This appendix provides an overview of CRM Sales application reports and allows you to view summary tables of all reports.

PeopleSoft EnterpriseOne CRM Sales Application Reports: A to Z

These tables list the CRM Sales application reports, sorted alphanumerically by report ID.

Lead

These reports are available for sales leads:

Report ID and Report Name	Description	Navigation
R90CB010A Lead Tracking Report	This report includes all leads that have been entered during the specified date range, organized by lead status.	Leads (G90CA0201), select Lead Tracking
R90CB010B Lead By Product Category Report	This report includes a list of leads for each product line. The report includes the lead name, company, city, and qualification score.	Leads (G90CA0201), select Lead By Product
R90CB010C Lead By Lead Source Report	This report includes a list of leads, organized by lead source. The report includes each lead's name, company, city, state, and phone number. The report also includes the total number of leads per lead source.	Leads (G90CA0201), select Lead By Lead Source
R90CB5161, Version XJDE5160 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5160 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5160)

Report ID and Report Name	Description	Navigation
R90CB5161, Version XJDE5161 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5161 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Address (Avery 5161)
R90CB5161, Version XJDE5163 Lead Address Avery Report	This report produces shipping labels for each active lead in the system in Avery 5163 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Shipping Address (Avery 5163)
R90CB5161, Version XJDE5389 Lead Address Avery Report	This report produces index post card labels for each active lead in the system in Avery 5389 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Index Post Card (Avery 5389)
R90CB5161, Version XJDE5663 Lead Address Avery Report	This report produces mailing labels for each active lead in the system in Avery 5663 label format. The report includes each lead's contact name, company name, street address, city, state, postal code, and country.	Leads (G90CA0201), select Lead Clear Address (Avery 5663)

Opportunity

These reports are available for sales opportunities:

Report ID and Report Name	Description	Navigation
R90CB020A Opportunities by Channels Report	This report includes each active opportunity in the system, organized by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel
R90CB020B Opportunities by Probability Report	This report includes a summary of all opportunities, grouped by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability

Report ID and Report Name	Description	Navigation
R90CB020C Opportunities by Probability for a Sales Rep Report	This report includes a summary of all opportunities, grouped by sales representative, and then by probability. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Probability For Selected Sales Representatives
R90CB020D Opportunities by Territories Report	This report includes a summary of all active opportunities, grouped by territory. The report includes the account's name, description of each opportunity, probability of closure, potential of the opportunity, and weighted average. The potential and weighted averages are totaled for each probability group, and grand totals are listed at the end of the report.	Opportunity (G90CA0202), select Opportunities by Territory
R90CB020E Opportunities by Channels for a Sales Rep Report	This report includes each active opportunity for selected sales representatives, organized by representative and then by channel. The report includes account name, description of the opportunity, probability of closing, and weighted potential.	Opportunity (G90CA0202), select Opportunities by Channel For Selected Sales Representatives
R90CB020I Opportunity Summary Report	This report includes summarized information for each selected opportunity. The report includes probability, potential, activity information, sales drivers used, qualification steps, and notes about the opportunities.	Opportunity (G90CA0202), select Opportunity Summary

Forecast

These reports are available for sales forecasts:

Report ID and Report Name	Description	Navigation
R90CB06A Forecast - Frozen Forecast Status Report	This report displays a frozen forecast with all of the forecast's associated opportunities as of the current date. The report enables users to review the change, if any, in the dollar amounts for opportunities between the current date and the date the forecast was frozen.	Forecast (G90CA0203), select Frozen Forecast Status
R90CB020F Opportunity Pipeline Review by Close Date Report	This report includes information such as company, lead source, probability, potential, and sales cycle, for all opportunities with a close date that is within the specified date range.	Forecast (G90CA0203), select Pipeline Review By Close Date

Action Plan/Activity

These reports are available for activities and action plans:

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List Report	This report includes summary information about all action plans, such as the description of the plan, and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CA0204), select Action Plan Listing
R90CA1301B Activities for a Customer Contact Report	This report includes all assigned activities for each customer. The activities are grouped by customer, and include the activities contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CA0204), select Activities By Customer
R90CA13D Periodic Planner Report	This report displays selected users schedules, including activities and to do items, for a specified period of time. The report also includes all related details for each activity or to do item.	Action Plan/Activity (G90CA0204), select Activity - Periodic Planner

Competitor

These reports are available for competitors:

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail Report	This report includes all information about a competitor and their products. You can use this report to compare the products from your organization with those of the competitors.	Competitor (G90CA0205), select Competitor Product Selected

Customer

These reports are available for customers:

Report ID and Report Name	Description	Navigation
R90CA080B Customer/Contact Summary Report	This report includes summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CA0206), select Customer Contact Summary
R90CA080G Customer Summary - Selected Report	This report includes summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CA0206), select Customer Summary
R90CA0111A Contacts for a Customer Report	This report lists each contact, along with the associated contact information for each selected customer.	Customer (G90CA0206), select Contacts by Customer

Employee

These reports are available for employees:

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List Report	This report includes all active employees in the system, along with their titles and phone numbers.	Employee (G90CA0207), select Employee Phone List

Partner

These reports are available for partners:

Report ID and Report Name	Description	Navigation
R90CA01B Partner Listing Report	This report includes all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CA0208), select Partner List

Contact

These reports are available for contacts:

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Summary Shipping - Avery 5163 Report	This report produces shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address Shipping (Avery 5163)
R90CA070B Contact Summary Shipping - Avery 5160 Report	This report produces mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5160)
R90CA070C Contact Avery 5161 Report	This report produces mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Contact (G90CA0209), select Contact Address (Avery 5161)

Product Catalog

These reports are available for product catalogs:

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List Report	This report includes all product catalogs, along with the available products associated with each catalog.	Product Catalog (G90CA02010), select Product Catalog List

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

PeopleSoft E1

Lead Tracking Report

From Date: 01/01/99 Through Date: 31/12/05

CON Converted

Company	Name	Lead Owner	Lead Source	Date Received	Qualification	Qualification Goal	Qualification Score
Fox Industries	Fox, Kevin	McLind, Rod		26/04/04	Heath 4/21/2004	12.00	0
2Holmes Bikes	Holmes, Jim	Padmini Company		18/05/04		0.00	0
Howard Spencer Bikes	Spencer, Howard	Suresh Joshi	California Conference	26/05/04	Bike Sales	40.00	0
Best Bikes	Smith, John	Capital System5678901234567890	California Conference	01/06/04	Bike Sales Qualification	15.00	0
Stevens Bikes	Stevens, Bill	Capital System5678901234567890	California Conference	16/06/04	Bike Sales Qualification	15.00	0
Bike Avalanche	Mason, Archie	Capital System5678901234567890	New York Expo	18/06/04	Bike Sales Qualification	15.00	0

Lead by Product Category Report

Product Category: Touring Bikes

Date Received	Lead Name	Company	Location	Status Description	Qualification Goal	Qualification Score
01/06/04	Smith, John	Best Bikes	Denver CO	Converted	15	0
26/05/04	Spencer, Howard	Howard Spencer Bikes	Denver CO	Converted	40	0

Count of Leads: 2

PeopleSoft E1
Lead By Lead Source Report

Name	Company	City	Phone
Alok Tyagi	PeopleSoft	Charlotte	()
Barbara Jones	Hewlett	WESTMINSTER	()
Bill Stevens	Stevens Bikes	Denver	()
Elliot Franklin	Hardware Associates	SHERIDAN	()
George Smith	Bikes Galore	Denver	()
Howard Roberts	Granger Enterprises	Boulder	()
JD Sampson	Olson MicroSystems	CENTENNIAL	()
Jim Holmes	2Holmes Bikes	Denver	()
Jim Holmes	Dirty Mountain Cycles	Denver	()
Jim Holmes	Holmes Bikes	Denver	()
Joe Allen	Joe the Stuff	ABC City	()
Joe Groshong	Agilent Technologies	Fort Collins	()
Joe Smith	dddd	denver	()
John Marshall	2Marshall Bikes	Denver	()
John Marshall	Marshall Bikes	Denver	()
John Smith	Best Bikes	Denver	()
Kevin Fox	Fox Industries	charlotte	()
Kevin Fox	Blood Sweat and Tears Cycle Supplier	Charlotte	()

Opportunities by Probability Report
All Amounts on the report are displayed in U.S. Dollar

Probability of 10%

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
Agilent Technologies	Agilent	10%	30,000.00	3,000.00
Bikes Galore	Bikes Galore Opportunity	10%	10,000.00	1,000.00
Capital	Capital System Opportunity	10%	10,000.00	1,000.00
System567890123456789012345				
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	10%	100,000.00	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	10%	10,000.00	1,000.00
Stevens Bikes	Stevens Bikes Opportunity	10%	10,000.00	1,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	1,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	50,000.00	5,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	1,000.00
Number of Opportunities: 9			Totals:	240,000.00
				24,000.00

Opportunities by Territories Report

All Amounts on the report are displayed in U.S. Dollar

Teng Territory

Customer	Opportunity Description	Probability %	Potential Amount	Weighted Potential Amount
ABC Inc.	ABC Inc, Opportunity 2	20%	12,000.00	2,400.00
Agilent Technologies	Agilent	10%	30,000.00	3,000.00
Bikes Galore	Bikes Galore Opportunity	10%	10,000.00	1,000.00
Cat Food Inc.	Cat Food Inc. Opportunity	40%	1,000.00	400.00
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	10%	100,000.00	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	10%	10,000.00	1,000.00
Mass Harbor Technology	Technology for Mass Harbor	20%	15,000.00	3,000.00
Mass Harbor Technology	Mass Harbor Inside Sales	20%	20,000.00	4,000.00
Number of Opportunities: 8		Totals:	<u>198,000.00</u>	<u>24,800.00</u>
Total Number of Opportunities: 8		Grand Totals:	<u><u>198,000.00</u></u>	<u><u>24,800.00</u></u>

Opportunities by Channels for a Sales Rep. Report

All Amounts on the report are displayed in U.S. Dollar

Sales Rep: Allen,Ray

AB #: 6001

Opportunity Channel Type: Direct

DIR

Customer	Opportunity Description	Probability%	Budget Amount	Potential Amount	Weighted Potential Amount
William Smith Bikes	William Smith Bikes Opportunity	10%	50,000.00	50,000.00	5,000.00
William Smith Bikes	William Smith Bikes Opportunity	10%	10,000.00	10,000.00	1,000.00
Number of Opportunities: 2			Totals: 60,000.00	60,000.00	6,000.00
Total Number of Opportunities for Allen,Ray		2	Totals: 60,000.00	60,000.00	6,000.00
Total Number of Opportunities: 2			Grand Totals: 60,000.00	60,000.00	6,000.00

Opportunity Pipeline Review by Close Date Report

From Date: 01/01/99 Through Date: 31/12/05

All Amounts on the report are displayed in U.S. Dollar

Probability of 10%

Customer	Opportunity Description	Sales Methodology	Sales Cycle	Owner	Lead Source	Prob %	Date Created	Closed Date	Potential Amount
Capital System567890123456789012345	Capital System Opportunity	Bike Sales	Proposal	Not Assigned		10%	18/08/04	27/09/04	10,000.00
Bikes Galore	Bikes Galore Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	26/05/04	26/09/04	10,000.00
Howard Spencer Bikes	Howard Spencer Bikes Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	26/05/04	26/09/04	100,000.00
Stevens Bikes	Stevens Bikes Opportunity	Bike Sales	Proposal	Not Assigned	California Conference	10%	19/08/04	16/10/04	10,000.00
Agilent Technologies	Agilent	Bike Sales	Proposal	Not Assigned		10%	21/06/04	17/10/04	30,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/08/04	24/10/04	10,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/06/04	24/10/04	50,000.00
William Smith Bikes	William Smith Bikes Opportunity	Bike Sales	Proposal	Not Assigned	Purchased list	10%	24/06/04	24/10/04	10,000.00
Lewis Bike Company	Lewis Bike Company Opportunity	Bike Sales	Proposal	Not Assigned		10%	28/06/04	28/10/04	10,000.00
Number of Opportunities: 9								Totals:	<u>240,000.00</u>
Total Number of Opportunities: 16								Averages:	<u>26,666.67</u>
Total Number of Opportunities: 16								Grand Totals:	<u><u>291,600.00</u></u>
Total Number of Opportunities: 16								Grand Average:	<u><u>18,225.00</u></u>

PeopleSoft E1
Opportunity Summary Report

All the Currency Amounts displayed in Canadian Dollar

Opportunity Number: 40

Owner: Not Assigned

Description: Bikes Galore Opportunity

Opportunity Type: Direct

Lead Source: California Conference

Partner:

Partner Contact:

Sold To Customer: Bikes Galore

Sold To Customer Contact: George Smith

Ship To Customer: Bikes Galore

Ship To Customer Contact: Not Assigned

Qualification Id: Bike Sales

Potential Amount: 14,220.00

Qualification Goal: 50

Budget Amount: 14,220.00

Qualification Score: 0

Line Item Total:

Sales Methodology: Bike Sales

Associated Cost:

Sales Cycle Name: Proposal

Total Expense:

Probability: 10%

Total Time (HRS):

Date Entered: 26/05/04

Close Date: 26/09/04

Sales Drivers

Qualifications

Activities

Forecast - Frozen Forecast Status Report

Forecast: Sales Forecast 2004 Q3 and Q4

Id: 33

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Bikes Galore	Bikes Galore Opportunity		26/09/04	10%	10000.00	1,000.00	U.S. Dollar
Howard Spencer Bikes	Howard Spencer Bikes Opportunity		26/09/04	10%	100000.00	10,000.00	U.S. Dollar
Stevens Bikes	Stevens Bikes Opportunity		16/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/06/04	100	10000.00	10,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	50000.00	5,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/06/04	100	10000.00	10,000.00	U.S. Dollar
Global Enterprises	Global Ent - Increased Storage Requirements		27/08/04	0	65000.00		U.S. Dollar
ABC Inc.	ABC Inc, Opportunity 2		18/08/04	20%	12000.00	2,400.00	U.S. Dollar
Mass Harbor Technology	Commercial Technology Division		24/08/04	0	500000.00		U.S. Dollar
Agilent Technologies	Agilent Commercial Opportunity		24/08/04	0	500000.00		U.S. Dollar
Howard & Assoc	Howard's South Eastern Opportunity		24/08/04	0	600000.00		U.S. Dollar
Mass Harbor Technology	Technology for Mass Harbor		30/12/04	20%	15000.00	3,000.00	U.S. Dollar
Mass Harbor Technology	Mass Harbor Inside Sales		30/12/04	20%	20000.00	4,000.00	U.S. Dollar
Mass Harbor Technology	Mass Harbor HR		30/08/04	0	36000.00		U.S. Dollar
Mass Harbor Technology	Mass Harbor Sales		30/08/04	0	36000.00		U.S. Dollar
DNT Customer	DNT Spring Sale		01/09/04	0	12000.00		U.S. Dollar

Opportunity Status as of: 26/10/04 8:47:31

Customer	Opportunity Description	Owner	Close Date	Probability%	Potential Amount	Weighted Potential Amount	Currency Code
Bikes Galore	Bikes Galore Opportunity		26/09/04	10%	10000.00	1,000.00	U.S. Dollar
Howard Spencer Bikes	Howard Spencer Bikes Opportunity		26/09/04	10%	100000.00	10,000.00	U.S. Dollar
Stevens Bikes	Stevens Bikes Opportunity		16/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/06/04	100	10000.00	10,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	50000.00	5,000.00	U.S. Dollar
William Smith Bikes	William Smith Bikes Opportunity		24/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/10/04	10%	10000.00	1,000.00	U.S. Dollar
Lewis Bike Company	Lewis Bike Company Opportunity		28/06/04	100	10000.00	10,000.00	U.S. Dollar
Global Enterprises	Global Ent - Increased Storage Requirements		27/08/04	0	65000.00		U.S. Dollar
ABC Inc.	ABC Inc, Opportunity 2		18/08/04	20%	12000.00	2,400.00	U.S. Dollar
Mass Harbor Technology	Commercial Technology Division		24/08/04	0	500000.00		U.S. Dollar
Agilent Technologies	Agilent Commercial Opportunity		24/08/04	0	500000.00		U.S. Dollar
Howard & Assoc	Howard's South Eastern Opportunity		24/08/04	0	600000.00		U.S. Dollar
Mass Harbor Technology	Technology for Mass Harbor		30/12/04	20%	15000.00	3,000.00	U.S. Dollar