

## Task Summary Report

From 3/1/2004 Thru 12/31/200

Assigned To: Gomez,Carol

Sales User ID 100957

<u>Start Date</u>	<u>End Date</u>	<u>Status</u>	<u>Source</u>	<u>Name of Lead or Opportunity</u>
<u>Customer</u>			<u>Contact</u>	
3/23/2004 Wayne Industries		OPEN	OPPRT Cobblepot,Oswald	Wayne Ind. - New Product Push
<b>Task:</b> Send Product Information Email product information to Oswald.				
3/25/2004 Wayne Industries	3/25/2004	OPEN	OPPRT Cobblepot,Oswald	Wayne Ind. - New Product Push
<b>Task:</b> Initial Meeting Meet with Oswald to discuss product offerings. This is a first meeting.				
3/30/2004 Falcon Group		OPEN	OPPRT Cairo,Joel	Falcon Group - New Products
<b>Task:</b> Send Product Information Send Product Information to Joel and Sam				
4/12/2004 Falcon Group	4/12/2004	OPEN	OPPRT Cairo,Joel	Falcon Group - New Products
<b>Task:</b> Product Meeting Meet to discuss product set.				
3/29/2004 Vocal Group		OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
<b>Task:</b> Send Literature Send Product Information to Leonard.				
4/7/2004 Vocal Group	4/7/2004	OPEN	OPPRT Dobbs,Calvin	Vocal Group - Product Interest
<b>Task:</b> Set Meeting Set up meeting with Vocal Group.				
3/25/2004 Temple Worldwide Electronics		CMPL	OPPRT Carman,Jake	Temple - New Product Interest
<b>Task:</b> Convert to Opportunity				

Person ID: 300019

Set ID: IPROD

Customer Name: Haas Engineering

Web Site: www.peoplesoft-haasengineering.com

<u>Phone Type</u>	<u>Country Code</u>	<u>Phone</u>
Business	001	555/402-0099

**Installed Products**

Product:D	Description	Ship Date	Quantity	PO ID
SR1001	Accu - Chill Air Conditioner	05/28/2002	1.00	
SR1009	24.7 cu. Ft. Refrigerator w/Fc	01/22/2002	1.00	

**Agreements**

<u>Agreement Template</u>	<u>Agreement Code</u>	<u>Num</u>	<u>Start Date</u>	<u>End Date</u>	<u>PO ID</u>

**Open Cases**

Priority

Status

<u>Case ID</u>	<u>Last Name</u>	<u>First Name</u>	<u>Summary</u>
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**Leads**

Lead Status      Converted to Opportunity

Lead Rating

<u>Lead ID</u>	<u>Territory</u>	<u>Contact</u>
100300006	SF Bay Area	Hunter,Nancy
100300006	SF Bay Area	Newsome,Jerry
100300006	SF Bay Area	Ericson,Paul
100300006	SF Bay Area	Hunter,Nancy
100300006	SF Bay Area	Newsome,Jerry
100300006	SF Bay Area	Ericson,Paul

**Contacts**

<u>Name</u>	<u>Title</u>	<u>Office Email Address</u>	<u>Phone Type</u>	<u>Phone</u>
Aluri,Ahmed	Support Manager	aaluri@haaseng_psft.com		
Bazil,Julie	Admin	julie@haaseng_psft.com		555/421-9020
Ericson,Paul	Vice President	pericson@haaseng_psft.com		555/444-1231
Hunter,Nancy		nhunter@haaseng_psft.com		555/232-9011
Newsome,Jerry		jnewsome@haaseng_psft.com		555/421-0913
				555/492-1002

**Sites**

<u>Site ID</u>	<u>Descr</u>	<u>Phone</u>	<u>Extension</u>
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**Customer:** Chad Rawlings

**Opportunity:** Sales Opp 3

**Opportunity Id:** 20020077

**Contact:** Rawlings Chad

**Business Unit:** US200

**Sales Rep:** Stephen Ray **Actual Total:** 0.00

**Currency:** USD

**Status:** Open **Close Date:** 3/30/2002

**Confidence Pct Close:** 80.00

**Territory:** CENTRAL US200 **Stage:** DEVELOP PROPOSAL

**Stage Pct Close:** 50.00

**Competitors**

Company	Product	Notes
Alan's Appliance Recycling		
Strong Presence	10010	

**Contact**

Name	Work Phone	Ext	Role
Chad Rawlings			General Manager

**Sales Team**

Name	Type	Phone	Ext	Role
Stu Marx	SMGR	555 5551260		0001

**Needs**

Priority	Req. Date	Date Fulfilled	Description
High	2/28/2002		Customer needs spare parts for Air Conditioners

**Quote**

Order No	Order Type	Price	When Added	Expires On
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**Activity**

Start Date	Status	Task Type	Description
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**Product Detail**

<b>Group</b>	<b>Group Description</b>	<b>ID</b>	<b>Product Description</b>	<b>Qty</b>	<b>Revenue</b>
A/C	Air Conditioner	10010	Air Cond, Fan	600.00	23,928.00
A/C	Air Conditioner	10011	Air Cond, Control Unit	250.00	37,495.00
				<b>Total</b>	61,423.00

From Date: 10/1/2007 To Date: 12/31/2007

Product Group: A/C  
Business Unit: APP01  
Product Descr: Split Unit Air Conditioner

<u>Customer Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Shoreview Medical	4,000.00	USD	100.00
	<b>4,000.00</b>		<b>100.00</b>
<b>Total for Product Group:</b>	<b>4,000.00</b>		
<b>Grand Total:</b>	<b>4,000.00</b>		

Person ID: 300023 - Lee,Burt

Product Group: A/C - Split Unit Air Conditioner

<u>Product ID</u>	<u>Opportunity Name</u>	<u>Qty</u>	<u>UOM</u>	<u>Price</u>	<u>Cost</u>	<u>Curr</u>
SR1001	Shoreview Medical	10.00	EA	449.88	4,498.80	USD
Accu - Chill Air Conditioner						
<b>Total For Product Group</b>		<b>10.00</b>		<b>4,498.80</b>		

Date From: 12/01/2007 Date Thru: 12/31/2007

Industry ID: MEDICAL SU

Business Unit: APP01

Industry Descr: Medical Supplies

<u>Name</u>	<u>Revenue</u>	<u>Currency</u>	<u>Total %</u>
Shoreview Medical	6,210.00	USD	100.00
	<b>6,210.00</b>		<b>100.00</b>
	<b>6,210.00</b>		
<b>Grand Total:</b>	<b>6,210.00</b>		



## Customer Revenue Ranking By Region

Date From: 1/1/2004 Date Thru: 12/31/2007

Business Unit: APP01

Region: Northern California

Name	Revenue	Currency	Total %
Arnold Ice Company	100,000.00	USD	100.00
<b>Total</b>	<b>100,000.00</b>		<b>38.79</b>

Region: Western

Name	Revenue	Currency	Total %
Parker-Lowell Drug Company	67,264.40	USD	42.63
Shoreview Medical	6,210.00	USD	3.94
Explore Design Center	84,325.90	USD	53.44
<b>Total</b>	<b>157,800.30</b>		<b>61.21</b>

<b>Grand Total</b>	<b>257,800.30</b>		
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## Forecast By Product Group Report

Product Group : All

Forecast Type : OPEN

Currency : USD

		<u>Forecast Type</u>	<u>Revenue</u>	<u>%Total</u>
<b>Business Unit : APP01</b>				
<b>Product Group :</b>	<b>REFRIDGE</b>	Refrigerator		
<b>Product ID:</b>	<b>9999</b>	Refrigerator - Configurable		
		OPEN	60,019.50	100.00
	<b>Total Revenue for Product ID:</b>		<b>60,019.50</b>	
<b>Product ID:</b>	<b>D9998</b>	Wine & Beverage Refrigerator		
		OPEN	1,200.00	100.00
	<b>Total Revenue for Product ID:</b>		<b>1,200.00</b>	
<b>Product ID:</b>	<b>D9999</b>	Refrigerator, Custom		
		OPEN	5,000.00	100.00
	<b>Total Revenue for Product ID:</b>		<b>5,000.00</b>	
<b>Product ID:</b>	<b>WESA4055</b>	Complete Installation Service		
		OPEN	4,500.00	100.00
	<b>Total Revenue for Product ID:</b>		<b>4,500.00</b>	
	<b>Total Revenue for Product Group:</b>	REFRIDGE	<b>70,719.50</b>	<b>100.00</b>
<b>Product Group :</b>	<b>WALK-INS</b>	Walk-In Coolers		
<b>Product ID:</b>	<b>SR2010</b>	Walk-In Freezer 7ft 9in x11ft		
		OPEN	21,139.20	100.00
	<b>Total Revenue for Product ID:</b>		<b>21,139.20</b>	
<b>Product ID:</b>	<b>SR2900</b>	Custom Build Freezer Package		
		OPEN	22,526.94	100.00
	<b>Total Revenue for Product ID:</b>		<b>22,526.94</b>	
	<b>Total Revenue for Product Group:</b>	WALK-INS	<b>43,666.14</b>	<b>100.00</b>
	<b>Total Revenue for Business Unit:</b>	APP01	<b>114,385.64</b>	

## Forecast Report by Sales User

<b>Forecast Category</b>	<b>Revenue</b>						
<b>Sales User</b>	<b>Lee,Burt</b>						
<b>Forecast ID</b>	<b>2009 SEPTEMBER</b>						
<b>Time Frame Period</b>	<b>2009 BY MONTH-S</b>						
<b><u>Opportunity Name</u></b>	<b><u>Sales Stage</u></b>	<b><u>Forecast Type</u></b>	<b><u>Close Date</u></b>	<b><u>Revenue</u></b>	<b><u>Confid. %</u></b>	<b><u>Close %</u></b>	<b><u>Curr</u></b>
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	600.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	3,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	4,500.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	75,000.00	90.00	100.00	USD
Total For the Timeframe Period	<b>2009 BY MONTH-S</b>			<b>83,100.00</b>			
Total For the Forecast ID	<b>2009 SEPTEMBER</b>			<b>83,100.00</b>			
Total For the Sales User	<b>Lee,Burt</b>			<b>83,100.00</b>			

## Forecast Report by Sales User

<b>Forecast Category</b>	<b>Revenue</b>						
<b>Sales User</b>	<b>Murphy, Terry</b>						
<b>Forecast ID</b>	<b>2009 SEPTEMBER</b>						
<b>Time Frame Period</b>	<b>2009 BY MONTH-S</b>						
<b><u>Opportunity Name</u></b>	<b><u>Sales Stage</u></b>	<b><u>Forecast Type</u></b>	<b><u>Close Date</u></b>	<b><u>Revenue</u></b>	<b><u>Confid. %</u></b>	<b><u>Close %</u></b>	<b><u>Curr</u></b>
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	3,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	50,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	2,000.00	90.00	100.00	USD
OneCool Appliances	RETAIN CUSTOMEF	OPEN	09/14/2009	400.00	90.00	100.00	USD
Total For the Timeframe Period	<b>2009 BY MONTH-S</b>			<b>55,400.00</b>			
Total For the Forecast ID	<b>2009 SEPTEMBER</b>			<b>55,400.00</b>			
Total For the Sales User	<b>Murphy, Terry</b>			<b>55,400.00</b>			
<b>Grand Total:</b>				<b>138,500.00</b>			

Time Frame : 2009 BY MONTH-SEP

Currency : USD

Forecast Name : 2009 SEPTEMBER

Forecast Category : Revenue Forecast

Forecast Type

Revenue

Business Unit : APP01

Territory : California

Product Group :

Product : Complete Installation Service

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

1,000.00

Total:

1,000.00

Product : Compressor Type A

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

125,000.00

Total:

125,000.00

Total By Product Group

126,000.00

Product Group : Chest Freezer

Product : Freezer Maintenance Service

Sales Model : PSFT - Knowledge Enabled Sales

Sales Stage : Retain Customer

OPEN

12,500.00

Total:

12,500.00

Total By Product Group

12,500.00

Revenue Fallout Analysis

From Date : 8/15/2007 Thru Date : 8/15/2007

Business Unit : US200

Currency : USD

Tree WORLD Territory WORLD

Sales Stage : Qualify Customer

<u>Customer</u>	<u>Opportunity</u>	<u>Close Date</u>	<u>Revenue</u>	<u>Reason</u>	<u>% Total</u>
MMA Property Management Grd	MMA Property Management Gro	8/15/2007	1,500.00	Lost Deal on Features	100.00
<b>Total By Sales Stage</b>			<b>1,500.00</b>		
<b>Total By Tree/Territory</b>			<b>1,500.00</b>		<b>100.00</b>
<b>Total By Business Unit</b>			<b>1,500.00</b>		