



Sample Report Views by Role

Sales Manager

Customer Sales by Class	2
Customer at Risk of Loss Report	3
Multi-Customer Top 10 Winners Rolling 3	4
New Business by Customer	5
New Projects Started in Last X Days	6
Potential Lost Business by Customer	7
Revenue Prior YTD Variance % and Forecasting Graph	8
Rising Stars, Falling Stars Rolling 3 Month Period Method	9
Top 15 Revenue Clients	10

Customer Sales By Class

CU10.42c



CU10.42c View

Description:

The report shows a monthly two year chart of revenue. The data is broken out by department and can be filtered based on Inventory item, sales person, project (where applicable).

Customer at Risk of Loss Report

CU10.20

Period: Apr		Year: 2006		Salesperson: All Salesperson.Territory	
Customer Class: All Customer.Customer Class		Project: All Project.All		Subaccount: All Subaccount.All	
	Rolling 12	Years as Customer			
A. Datum Corporation	120,149	5			
Adventure Works	105,161	5			
Alpine Ski House	15,000	5			
Alpine Ski House Builders	13,553	3			
Blue Yonder Airlines	19,541	7			
City Highway Department	15,700	5			
City Power & Light	23,379	2			
City Power & Light	47,191	8			
Coho Printing	18,525	5			
Fabrikam	11,750	7			

CU10.20 View

Description:

The report shows customers that are at risk of being lost based on recent inactivity. It displays customers with 0 or negative revenue in last 3 periods and revenue in last 12 periods in excess of \$10,000.

Multi Customer Top 10 Winners Rolling 3 CU10.10

Year : 2006	Period : Jan	Company : All Company.All	Project : All Project.All	Subaccount : All Subaccount.All
	Variance %	Cust Rank For Mnth	Rolling 3	Rolling 12 Mnth Revenue
Elbertsons Food Center	217	35	173,503	228,217
Blue Sky State University	148	10	228,120	320,226
Johnnie's Chicago Style Pizza	99	31	124,945	187,782
Adams Supermarket	91	61	50,915	155,921
Bear Creek Country Store	73	66	40,715	129,990
Bobs Valley Market	65	69	41,399	130,973
Bar-B-Q Bar	62	36	129,489	402,972
Jerry Tucci's Pizza-Pasta	62	55	71,352	218,452
Hollywood Market	61	29	185,630	558,819
Asiagos Ristorante	60	78	24,925	75,244

CU10.10 View

Description:

The report Identifies repeat customers (those with activity in both the prior 3 months and 3 month period before that) demonstrating the largest revenue % increase. Current month ranking and rolling 12 revenues included shows significance to total operations. Included in the report are only customers with sales in last 3 months that are above baseline of \$10,000.

New Business by Customer

AR10.30

Period: Jan	Year: 2004	Subaccount: All Subaccount.All	Company: All Company.All
	Current Mnth Amt		
The Phone Company	3,600		
Blue Yonder Airlines	1,481		
Graphic Solutions, Inc.	975		

Navigation icons: Back, Forward, Home, Print, Refresh, Stop, Help, Search, and a small 'D' icon.

Footer: New Business by Customer D

AR10.30 View

Description:

The report displays current month new customer business. It identifies new customers as any customer with billing in current month, and a net of 0 billing in the 11 months prior. The information defaults to sorting in descending order by current month billed amount. Previous months can be reviews by altering the period and year information.

New Projects Stated in Last X Days

PA10.22

Project Proj Manager : All Project.Proj Manager		Project Proj Status : All Project.Proj Status		Company : All Company.All	
Default Member →	Days Since Start →	Day Lag After Start →	Est Duration in Weeks →	Weeks in Process →	
	0	0	0	0	

Navigation icons: Home, Back, Forward, Print, Refresh, Search, Help

Page Title: New Projects Started in Last X Days D

PA10.22 View

Description:

Identifies new projects started within the last X days based on project start date. Indicates new projects which are lagging based on days between start and first activity. Shows estimated project duration, actual duration and Estimate at Completion (EAC) Revenue.

Potential Lost Business by Customer

AR10.35

Period : Feb	Year : 2004	Subaccount : All Subaccount.All	Company : All Company.All
	Prior 4 Months		
Humongous Insurance	90,742		
Proseware Corporation	49,780		
Northwind Trade Union	15,164		
Cash Customer	500		
Northwind Traders	263		
Northwind Traders	44		

Navigation icons: Back, Forward, Home, Print, Refresh, Search, Help

Potential Lost Business by Customer

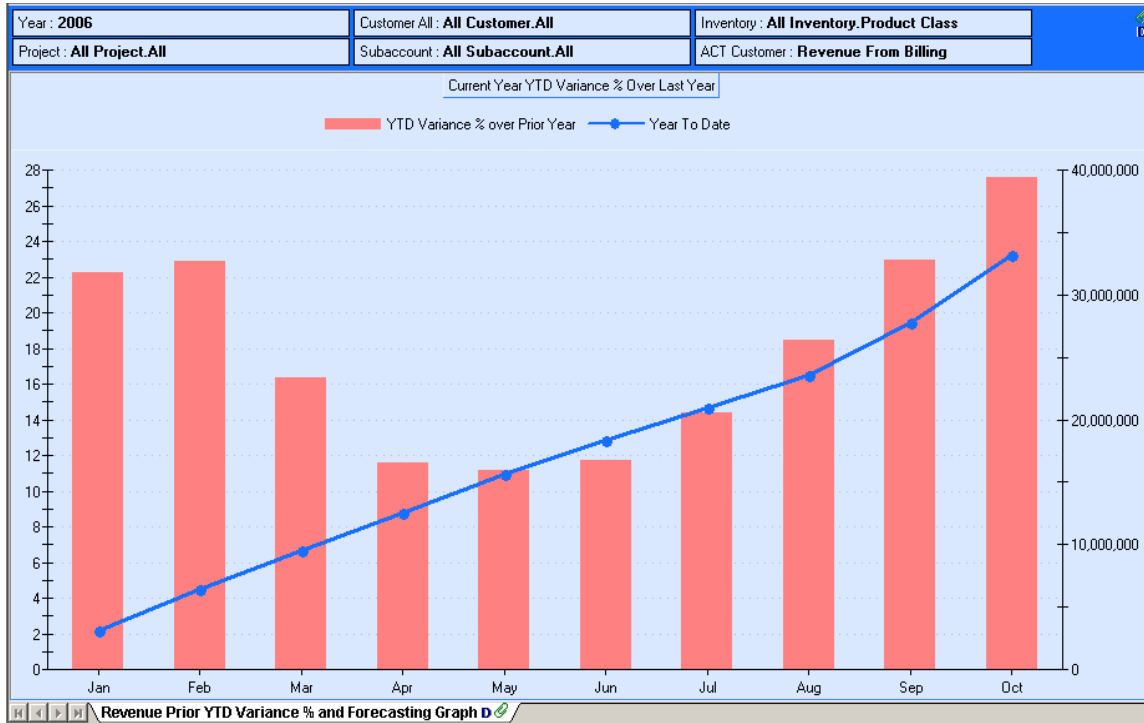
AR10.35 View

Description:

The report displays customers at risk of lost business based on a rolling 6 period basis. It includes customers with no billing in the current and prior month, but have billings in the prior 4 months. The report adjusts the data based on the Period and Year that are specified.

Revenue Prior YTD Variance % and Forecasting Graph

CU10.40c



CU10.40c View

Description:

The report analyzes cumulative YTD revenue performance relative to the prior year. Each bar represents that month's YTD revenue variance % over the same month YTD last year. The line represents current year monthly YTD revenue dollars. The report can highlight performance trends over time when attempting to forecast Year End Revenue results.

Rising Stars, Falling Stars Rolling 3 Period Method

CU10.25

Period: Apr	Year: 2006	Project: All Project.All	Subaccount: All Subaccount.All
	Movement in Rank Position	Rolling 3	
Minit Mart Quick Shop	11	270,536	
Save-A-Lot	5	208,521	
Transnational Foods Inc.	5	254,205	
Eastern Groceries	4	176,900	
Fitch Brothers Grogery	3	180,932	
Gardners Grocery Store	3	249,986	
Pit Stop Market	2	283,020	
Safeway Food & Drug	2	261,612	
Winslow Iga Foodliner	0	258,167	
Bumberland Farms Food Stores	0	180,197	
Mozart Super Store	0	164,408	
University of Killington	0	321,114	
Roger Super Store	(1)	270,382	
Japan Sage Market	(1)	233,233	
Virginia Tech	(2)	226,470	
Hubers Market	(3)	226,999	
University of Baltimore	(4)	167,657	
University of Concord	(4)	131,714	
University of Little Rock	(5)	254,849	
Georges International Grocery	(5)	242,696	
Philadelphia State University	(10)	176,272	

CU10.25 View

Description:

The report shows rising and falling star customers. Customer ranking are based on customers whose rolling 12 month revenue was in top 50%. It then compares the last three months to 9 months previous and indicates change in rank between last 3 months and 9 months prior. These customers may not be the biggest customers, but they have either increased or decreased the most of your customer base.

Top 15 Revenue Clients SN10.12

Customer Class: All Customer.Customer Class		Year: All	
	Total By Dept	All	% of Total
Total All Customers	53,800	53,800	100
Microsoft Corporation	41,800	41,800	78
Adventure Works	7,000	7,000	13
A. Datum Corporation	5,000	5,000	9

SN10.12 View

Description:

The report shows the top 15 customers by future contract billings. The information can be broken out by customer and customer class and can be filtered department and year.