



Sample Report Views by Role

Sales Representative

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Customer at Risk of Loss Report

CU10.20

Customer	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.

Daily Customer Activities

EN50.12

Day : 04 April		Year : 2006	Company : All Company.All	Account : All Account.Type	Project : All Project.Department
		Amount			
Product Invoicing	Daily Total	3,054,589			
	Consumer - Independent Stores	779,327			
	Consumer - Supermarkets	1,034,743			
	Institutional - Education	561,818			
	Institutional - Military	182,963			
	Restaurants - All Others	263,963			
	Restaurants - Italian only	231,776			
Customer Payments	Daily Total	2,990,356			
	Consumer - Independent Stores	814,141			
	Consumer - Supermarkets	896,028			
	Institutional - Education	624,293			
	Institutional - Military	199,615			
	Restaurants - All Others	235,700			
	Restaurants - Italian only	220,580			
Product Margin	Daily Total	42.1%			
	Consumer - Independent Stores	46.1%			
	Consumer - Supermarkets	42.6%			
	Institutional - Education	34.0%			
	Institutional - Military	31.3%			
	Restaurants - All Others	49.0%			
	Restaurants - Italian only	46.4%			

EN50.12 View

Description:

The Company Daily Top 5 Customer Activities report includes: product invoicing, cash receipts, product margin and project invoices. If no data is found then a warning message is displayed.

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 Projects Started in Last X Days

PA10.22

Project Proj Manager: All Project.Proj Manager	Project Proj Status: All Project.Proj Status			Company: All Company.All	
	Days Since Start	Day Lag After Start	Est Duration in Weeks	Weeks in Process	EAC Revenue
A. Datum Corporation					
CO035 Solomon OM Implementation	38,831	37,766	0	48	8,800
CO047 Time Line Reporting	38,831	38,831	0	0	
CO052 Version 5.0 Upgrade	38,831	37,716	0	9	243,600
CO062 CO062-Proj 2003 Deploy A Datum	1,121	384	27	1	28,500
EN001 Environmental Impact Study	755	11	40	0	111,125
EN002 SF Bay Bridge Design	755	13	40	1	
EN003 Earthquake Retrofit Bldg 400	755	2	40	12	405,250
EN005 Stadium Engineering Study	755	4	13	11	15,000
GC002 Federal Office Building	755	4	144	0	
GC006 Seattle City Hall Renovation	38,831	38,094	0	7	
SC001 Plumbing Retrofit Bldg 350	38,831	38,079	0	11	156,000
SC002 HVAC Office Building	843	98	52	10	
SC004 Plumbing Retrofit Bldg 350	38,831	38,108	0	12	52,500
SC005 HVAC Office Building	725	2	12	13	
SC007 Plumbing Retrofit Bldg 350	38,831	38,082	0	17	30,000
SC008 HVAC Office Building	38,831	38,198	0	0	
SC009 HVAC Office Building	38,831	38,136	0	9	
SC020 Plumbing Retrofit Bldg 350	38,831	38,108	0	14	83,000
SC021 HVAC Office Building	38,831	38,108	0	4	
Adventure Workers					
CO029 Print Project Budget Screen	38,831	38,831	0	0	2,100
CO032 Project Reports	38,831	37,808	0	10	
Adventure Works					
CO008 Engineering	38,831	38,831	0	0	42,000
CO038 Solomon-MS Project Implement	38,831	37,852	0	36	42,000
CO049 Timeline Implementation	38,831	38,831	0	0	
EV003 Marketing Budget	38,831	38,831	0	0	
CO044	38,831	38,831	0	0	

PA10.22 View

Description:

The report identifies new projects started within the last x days based on project start date. It indicates new projects which are lagging based on days between start and first activity. Included are estimated project duration, actual duration and Estimate at Completion (EAC) Revenue values.

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.

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 Grogerly	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.

Single Customer Stats

CU10.45

Period: Jan	Year: 2006	Customer All: Adventure Works
Inventory: All Inventory.Product Class	Project: All Project.All	Subaccount: All Subaccount.All
	Operational	
Revenue Alert Rolling 3 Mnth to Prior Year	277%	
Revenue Alert Rolling 3 Mnth to Rolling 12	35%	
Years as Customer	5	
Customer Ranking - Current Mnth Revenue	72	
Months Since Last Invoice	19	
Avg Days to Pay	(10)	
LTD Revenue	151,372	
Current Mnth Amt	9,408	
Year To Date	9,408	
Prior Year	10,360	
Rolling 12	129,770	
Open Receivables	221,048	
Open Orders	50,240	

CU10.45 View

Description:

The report gives a holistic view of single client relationship. Include is life to date data, customer ranking, and revenue alerts comparing rolling 3 periods (less current month to same period last year and last 12).