

Crystal Clear Essentials
Sample Reports

Tami Sauer
Steve Stroz

CRYSTAL CLEAR ESSENTIALS

Crystal Clear Essentials

Sample Reports

Tami Sauer & Steve Stroz

© 2006 Crystal Clear Essentials. All rights reserved.
First Edition
www.crystalclear essentials.com

This document may not be copied, photocopied, or reproduced without prior consent from Crystal Clear Essentials.

Every effort has been made to ensure the accuracy of the contents of this manual; however, Crystal Clear Essentials makes no warranties with respect to this documentation, the contents, or implied warranties. Crystal Clear Essentials shall not be liable for any errors or damages in connection with the contents, performance, or use of this manual. All trademarks are the property of their respective owners.

Introduction

Crystal Clear Essentials is a powerful new reporting tool for your ACT! 2006 system!

Built using the world's most popular report generator, Crystal Reports, Crystal Clear Essentials delivers vital information to managers and executives in a way that is not possible using the built-in ACT! report generator.

These 15 essential reports can easily be run from the ACT! report menu and include prompts allowing the user to further customize the report. Considering all of the flexibility available through user selections, there are thousands of possible reporting outcomes.

Crystal Clear Essentials uses a powerful new development platform called the Crystal Clear Provider developed by Stan Smith of ADS Programming. Stan has developed a way for Crystal Reports programmers to access the ACT! data in a way that was previously not possible and represents a breakthrough in ACT! 2006 reporting.

Don't see the report you need? Want to add your company logo or color scheme? Not a problem. Your ACT! certified consultant or the staff at Crystal Clear Essentials can help.

Please direct any comments, suggestions, or questions to your ACT! certified consultant or:

Tami & Steve

requests@crystalcleaessentials.com

Sample Reports

Examples of the Crystal Clear Essentials reporting package.

These examples were created using the ACT8demo database that is included with ACT! 2006. They represent a small sampling of the many reports that can be created with Crystal Clear Essentials.

Some reports can be several pages long. In order to keep the examples to a few pages we have restricted the output by using the built-in parameters (user prompts).

Activity Report

Date Range: April 16, 2006 to April 29, 2006

Summary by User	Total Activities	Call	Meeting	Personal Activity	To-do
Total	15	5	4	2	4
Allison Mikola	5	2	1	0	2
Chris Huffman	10	3	3	2	2

Activity Report

Date Range: April 16, 2006 to April 29, 2006

Allison Mikola

Total Activities	Call	Meeting	To-do
5	2	1	2

Time	Type	Company	Contact	Phone	Regarding & Details
Monday, April 17, 2006					
	Call	Searchlight Casting	Gracie Anderson	(480) 555-3764	Follow up on special basket order for company meeting
1:30:00PM	Call	Django Consulting	Michaela J. Zip		Talk about electronic catalog potential
Friday, April 21, 2006					
4:30:00PM	To-do	Arcadia Ave. Florist	Jackie Jorgensen	01742 876234	Send Follow-Up Letter
Sunday, April 23, 2006					
12:00:00PM	To-do	CH Gourmet Gifts	Chris Huffman	(212) 555-1758	Place want ad for new Sales Rep.
7:00:00PM	Meeting	Spaghettoni's	Mary Nara	(423) 555-2872	Dinner Meeting

Activity Report

Date Range: April 16, 2006 to April 29, 2006

Chris Huffman

Total Activities	Call	Meeting	Personal Activity	To-do
10	3	3	2	2

Time	Type	Company	Contact	Phone	Regarding & Details
Thursday, April 20, 2006					
11:00:00AM	Call	Ace Pet Store	Colleen McCarthy	(541) 555-3648	Follow up on the Point of Purchase Display opportunity, Presentation stage
Friday, April 21, 2006					
10:00:00AM	Personal Activity	CH Gourmet Gifts	Chris Huffman	(212) 555-1758	Pickup show tickets!
12:00:00PM	Call	Black Forest Baking	Kristi Elmendorf	012-555-54	Confirm Shipment
Saturday, April 22, 2006					
11:00:00AM	To-do Meeting	American Dreams Tiny Town Productions	Hayleigh Frieda Ashley Allan	(972) 555-8442 (480) 555-2451	Send Contract Lunch Meeting
Tuesday, April 25, 2006					
9:00:00AM	To-do	CH Gourmet Gifts	Chris Huffman	(212) 555-1758	Purchase a Palm device - integrate with ACT!
7:00:00PM	Personal Activity	CH Gourmet Gifts	Chris Huffman	(212) 555-1758	Johnnie's Soccer Game Field #7
Wednesday, April 26, 2006					
4:00:00PM	Meeting	Mercury Production Management	Albert Barry	(303) 555-3278	Spend time reviewing the product
Thursday, April 27, 2006					
11:00:00AM	Call	Circle Photography	Jonathan Jenkins	(214) 555-2215	Follow up on the New Opportunity opportunity, Negotiation stage
Friday, April 28, 2006					
	Meeting	CH Gourmet Gifts	Chris Huffman	(212) 555-1758	Select content areas for upcoming eNewsletter edition

Production Report

Date Range: Cleared Activities from 4/12/2006 to 4/19/2006 and Pending Activities from 4/19/2006 to 4/26/2006

Summary by User

		Total	Call	Meeting	Personal Activity	To-do
Total		13	2	4	2	5
Allison Mikola	Total	5	1	1	0	3
	Cleared	2	1	0	0	1
	Pending	3	0	1	0	2
Chris Huffman	Total	8	1	3	2	2
	Cleared	1	0	1	0	0
	Pending	7	1	2	2	2

Production Report

Date Range: Cleared Activities from 4/12/2006 to 4/19/2006 and Pending Activities from 4/19/2006 to 4/26/2006

Allison Mikola

Cleared

Date	Time	Type	Company	Contact	Regarding & Details
4/12/2006		To-do	CH Gourmet Gifts	Chris Huffman	Review HTML version of eNewsletter
4/17/2006		Call	Searchlight Casting	Gracie Anderson	Follow up on special basket order for company meeting

Pending

Date	Time	Type	Company	Contact	Regarding & Details
4/21/2006	4:30:00PM	To-do	Arcadia Ave. Florist	Jackie Jorgensen	Send Follow-Up Letter
4/23/2006	12:00:00PM	To-do	CH Gourmet Gifts	Chris Huffman	Place want ad for new Sales Rep.
4/23/2006	7:00:00PM	Meeting	Spaghettoni's	Mary Nara	Dinner Meeting

Production Report

Date Range: Cleared Activities from 4/12/2006 to 4/19/2006 and Pending Activities from 4/19/2006 to 4/26/2006

Chris Huffman

Cleared

Date	Time	Type	Company	Contact	Regarding & Details
4/15/2006	7:30:00AM	Meeting	Dittmeier Delights	Liz Dittmeier	Breakfast Meeting

Pending

Date	Time	Type	Company	Contact	Regarding & Details
4/21/2006	10:00:00AM	Personal Activity	CH Gourmet Gifts	Chris Huffman	Pickup show tickets!
4/21/2006	12:00:00PM	Call	Black Forest Baking	Kristi Elmendorf	Confirm Shipment
4/22/2006		To-do	American Dreams	Hayleigh Frieda	Send Contract
4/22/2006	11:00:00AM	Meeting	Tiny Town Productions	Ashley Allan	Lunch Meeting
4/25/2006	9:00:00AM	To-do	CH Gourmet Gifts	Chris Huffman	Purchase a Palm device - integrate with ACT!
4/25/2006	7:00:00PM	Personal Activity	CH Gourmet Gifts	Chris Huffman	Johnnie's Soccer Game Field #7
4/26/2006	4:00:00PM	Meeting	Mercury Production Management	Albert Barry	Spend time reviewing the product

Group History Report

Date Range: April 1, 2006 to April 14, 2006

Summary for All Groups

	Total	Attachment	Call Completed	E-mail Sent	Meeting Held	Opportunity Stage Update	To-do Done
Total	21	1	4	1	4	8	3
Customers	12	0	4	0	2	3	3
Prospects	9	1	0	1	2	5	0

Group History Report

Date Range: April 1, 2006 to April 14, 2006

Customers

Total Histories	Call Completed	Meeting Held	Opportunity Stage	To-do Done
12	4	2	3	3

Company	Contact	Type	Regarding & Details	Record Manager
Saturday, April 01, 2006				
Best Lender Financing	Benny Lender	To-do Done	Responded to e-mail	Melissa Pearce
Sunday, April 02, 2006				
Willis Enterprises	Bill Willis	To-do Done	Responded to e-mail	Allison Mikola
Tuesday, April 04, 2006				
Willis Enterprises	Bill Willis	Call Completed	Schedule a meeting	Allison Mikola
Thursday, April 06, 2006				
Ace Pet Store	Sandy Ryan	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%	Chris Huffman
Dittmeier Delights	Liz Dittmeier	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%	Chris Huffman
Goldfish Records	Annette Sharkey	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 90%	Chris Huffman
Friday, April 07, 2006				
Best Lender Financing	Benny Lender	Call Completed	Schedule a meeting See if questions were answered by website. Suggest sampler. Mention referral bonuses.	Allison Mikola
Continental Energy	Herman Getter	Meeting Held	Presentation Company likes new sweetener products!	Allison Mikola
Saturday, April 08, 2006				
Ace Pet Store	Colleen McCarthy	To-do Done	Check Delivery Status	Ernst Anderson
Thursday, April 13, 2006				
MiniSoft	Anthony Federici	Meeting Held	Tennis at the club	Chris Huffman
Sewing Room;The	Danielle Middlebury	Call Completed	Follow up Follow up regarding Truffle Cake order.	Chris Huffman
Yellow Jersey Bike Shop	Lance J. Parker	Call Completed	Follow-up	Chris Huffman

Group History Report

Date Range: April 1, 2006 to April 14, 2006

Prospects

Total Histories	Attachment	E-mail Sent	Meeting Held	Opportunity Stage
9	1	1	2	5

Company	Contact	Type	Regarding & Details	Record Manager
Monday, April 03, 2006				
Arcadia Ave. Florist	Gavin Dillerstone	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Needs Assessment 10%	Chris Huffman
Quality Motors	Julie Britton	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Needs Assessment 10%	Chris Huffman
Wednesday, April 05, 2006				
A1 Services of UK	Ann Goodall	E-mail Sent	Subject: tEST Hi Ann,	Chris Huffman
A1 Services of UK	Ann Goodall	Attachment	pEWAUKEE mEETING Subject: TEst with attachment	Chris Huffman
Thursday, April 06, 2006				
ABS Garages Ltd	Ania Dawson	Opportunity Stage Update	Special Promotion - ACT! Sales Cycle: Needs Assessment 80%	Chris Huffman
Arcadia Ave. Florist	Gavin Dillerstone	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Presentation 40%	Chris Huffman
County Tennis Supplies	Chris Burn	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%	Chris Huffman
Monday, April 10, 2006				
Mad House;The Verge Records	Greg Hart Paul Henderson	Meeting Held Meeting Held	Discuss new product features Discuss new product features	Ernst Anderson Ernst Anderson

History Report

Date Range: April 3, 2006 to April 7, 2006

Summary by User

	Total	Attachment	Call Completed	Call Received	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage Update	To-do Done
Total	19	1	3	1	1	1	2	9	1
Allison Mikola	3	0	2	0	0	0	1	0	0
Chris Huffman	16	1	1	1	1	1	1	9	1

History Report

Date Range: April 3, 2006 to April 7, 2006

Allison Mikola

Total Histories	Call Completed	Meeting Held
3	2	1

Company	Contact	Type	Regarding & Details
Tuesday, April 04, 2006			
Willis Enterprises	Bill Willis	Call Completed	Schedule a meeting
Friday, April 07, 2006			
Best Lender Financing	Benny Lender	Call Completed	Schedule a meeting See if questions were answered by website. Suggest sampler. Mention referral bonuses.
Continental Energy	Herman Getter	Meeting Held	Presentation Company likes new sweetener products!

History Report

Date Range: April 3, 2006 to April 7, 2006

Chris Huffman

Total Histories	Attachment	Call Completed	Call Received	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage	To-do Done
16	1	1	1	1	1	1	9	1

Company	Contact	Type	Regarding & Details
Monday, April 03, 2006			
Arcadia Ave. Florist	Gavin Dillerstone	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Needs Assessment 10%
CH Gourmet Gifts	Chris Huffman	Call Completed	Customer follow-up - Sam Jones Resolved issue
Coffee Producers of Australia	Morgan Kennedy	Call Received	Reseller status Morgan called to see if we would consider her shop as a reseller.
Quality Motors	Julie Britton	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Needs Assessment 10%
Wednesday, April 05, 2006			
A1 Services of UK	Ann Goodall	E-mail Sent	Subject: tEST Hi Ann,
A1 Services of UK CH Gourmet Gifts	Ann Goodall Chris Huffman	Attachment To-do Done	pEWAUKEE mEETING Subject: TESt with attachment Send a quote to Mike J.
Thursday, April 06, 2006			
ABS Garages Ltd	Ania Dawson	Opportunity Stage Update	Special Promotion - ACT! Sales Cycle: Needs Assessment 80%
Ace Pet Store	Sandy Ryan	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%
Arcadia Ave. Florist CH Gourmet Gifts	Gavin Dillerstone Chris Huffman	Opportunity Stage Update Meeting Held	New Opportunity - ACT! Sales Cycle: Presentation 40% Interview candidate for sales position Extensive experience in sales
County Tennis Supplies	Chris Burn	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%
Dittmeier Delights	Liz Dittmeier	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 10%

History Report

Date Range: April 3, 2006 to April 7, 2006

Chris Huffman

Company	Contact	Type	Regarding & Details
Thursday, April 06, 2006			
Django Consulting	Michaela J. Zip	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Commitment to Buy 10%
Goldfish Records	Annette Sharkey	Opportunity Stage Update	New Opportunity - ACT! Sales Cycle: Sales Fulfillment 90%
Friday, April 07, 2006			
Coffee Producers of Australia	Morgan Kennedy	Field Changed	ID/Status - Reseller

History Summary by Contact

Date Range: April 5, 2006 to April 7, 2006

Summary by User

	Total	Attachment	Call Completed	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage Update	To-do Done
Total	14	1	1	1	1	2	7	1
Ania Dawson	1	0	0	0	0	0	1	0
Ann Goodall	2	1	0	1	0	0	0	0
Annette Sharkey	1	0	0	0	0	0	1	0
Benny Lender	1	0	1	0	0	0	0	0
Chris Burn	1	0	0	0	0	0	1	0
Chris Huffman	2	0	0	0	0	1	0	1
Gavin Dillerstone	1	0	0	0	0	0	1	0
Herman Getter	1	0	0	0	0	1	0	0
Liz Dittmeier	1	0	0	0	0	0	1	0
Michaela J. Zip	1	0	0	0	0	0	1	0
Morgan Kennedy	1	0	0	0	1	0	0	0
Sandy Ryan	1	0	0	0	0	0	1	0

History Summary by Contact

Date Range: April 5, 2006 to April 7, 2006

Allison Mikola

	Total	Call Completed	Meeting Held
Total	2	1	1
Benny Lender	1	1	0
Herman Getter	1	0	1

History Summary by Contact

Date Range: April 5, 2006 to April 7, 2006

Chris Huffman

	Total	Attachment	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage Update	To-do Done
Total	12	1	1	1	1	7	1
Ania Dawson	1	0	0	0	0	1	0
Ann Goodall	2	1	1	0	0	0	0
Annette Sharkey	1	0	0	0	0	1	0
Chris Burn	1	0	0	0	0	1	0
Chris Huffman	2	0	0	0	1	0	1
Gavin Dillerstone	1	0	0	0	0	1	0
Liz Dittmeier	1	0	0	0	0	1	0
Michaela J. Zip	1	0	0	0	0	1	0
Morgan Kennedy	1	0	0	1	0	0	0
Sandy Ryan	1	0	0	0	0	1	0

History Summary by ID/Status

Date Range: April 5, 2006 to April 7, 2006

Summary for All Users

	Total	Attachment	Call Completed	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage Update	To-do Done
Total	14	1	1	1	1	2	7	1
Customer	3	0	1	0	0	1	1	0
Customer;Influencer	2	0	0	0	0	0	2	0
Employee;Influencer	2	0	0	0	0	1	0	1
Influencer;Reseller	1	0	0	0	1	0	0	0
Prospect	5	1	0	1	0	0	3	0
Vendor	1	0	0	0	0	0	1	0

History Summary by ID/Status

Date Range: April 5, 2006 to April 7, 2006

Allison Mikola

	Total	Call Completed	Meeting Held
Total	2	1	1
Customer	2	1	1

History Summary by ID/Status

Date Range: April 5, 2006 to April 7, 2006

Chris Huffman

	Total	Attachment	E-mail Sent	Field Changed	Meeting Held	Opportunity Stage Update	To-do Done
Total	12	1	1	1	1	7	1
Customer	1	0	0	0	0	1	0
Customer;Influencer	2	0	0	0	0	2	0
Employee;Influencer	2	0	0	0	1	0	1
Influencer;Reseller	1	0	0	1	0	0	0
Prospect	5	1	1	0	0	3	0
Vendor	1	0	0	0	0	1	0

Note Report

Date Range: March 21, 2006 to April 7, 2006

Summary by User	Total
Total	11
Allison Mikola	6
Melissa Pearce	5

Note Report

Date Range: March 21, 2006 to April 7, 2006

Allison Mikola

Total
Notes
6

Company	Contact	Note
Tuesday, March 21, 2006		
Mix Alliance	Brian David	Brian is a good guy. Mostly gifts to business associates.
Widget Corporation	Max Headlong	Got his name and number from Frank
Saturday, April 01, 2006		
KKQS Radio	Bill Craig	Bill called to say he has his 20th anniversary coming up. Wanted to surprise Pamela with a custom truffle/wine basket. Looking into special order
MegaGadgets Catalog Co.	Ethan Campbell	Ethan is a buyer for the MegaGadgets Catalog Co. They are looking to expand their catalog to include CH Gourmet Gifts gift baskets. Orders could be big.
Mercury Production Management	Albert Barry	After visiting Albert's web page, I'm going to suggest some stronger blends. From the content, it appears that Albert's customers are very fast-paced.
SimAero	Bruce Baker	Bruce called today to talk about whether we could get him a corporate discount if he guarantees us X yearly business. I asked him to go into more detail. He is basically saying that he'll guarantee the following: 24 yearly customers average \$100 per gift to the customer - 3 gifts per sale 24 x 300 = 7200 Asked for 15% off this yearly commitment ~ \$1080 discount. I told him we could work towards it with discounts that grew over the year. He is putting together proposal and will forward it.

Note Report

Date Range: March 21, 2006 to April 7, 2006

Melissa Pearce

Total Notes 5

Company	Contact	Note
Friday, March 24, 2006		
Best Lender Financing	Benny Lender	Signed up for e-mail newsletter
Saturday, April 01, 2006		
Brandee's Bakery	Mackenzie Jensen	Signed up for e-mail newsletter
Brandee's Bakery	Mackenzie Jensen	First visit to CH Gourmet Gifts website
Mercury Production Management	Albert Barry	First visit to CH Gourmet Gifts website
Sunday, April 02, 2006		
Interactive Gifts	Chris Fierros	First visit to CH Gourmet Gifts website

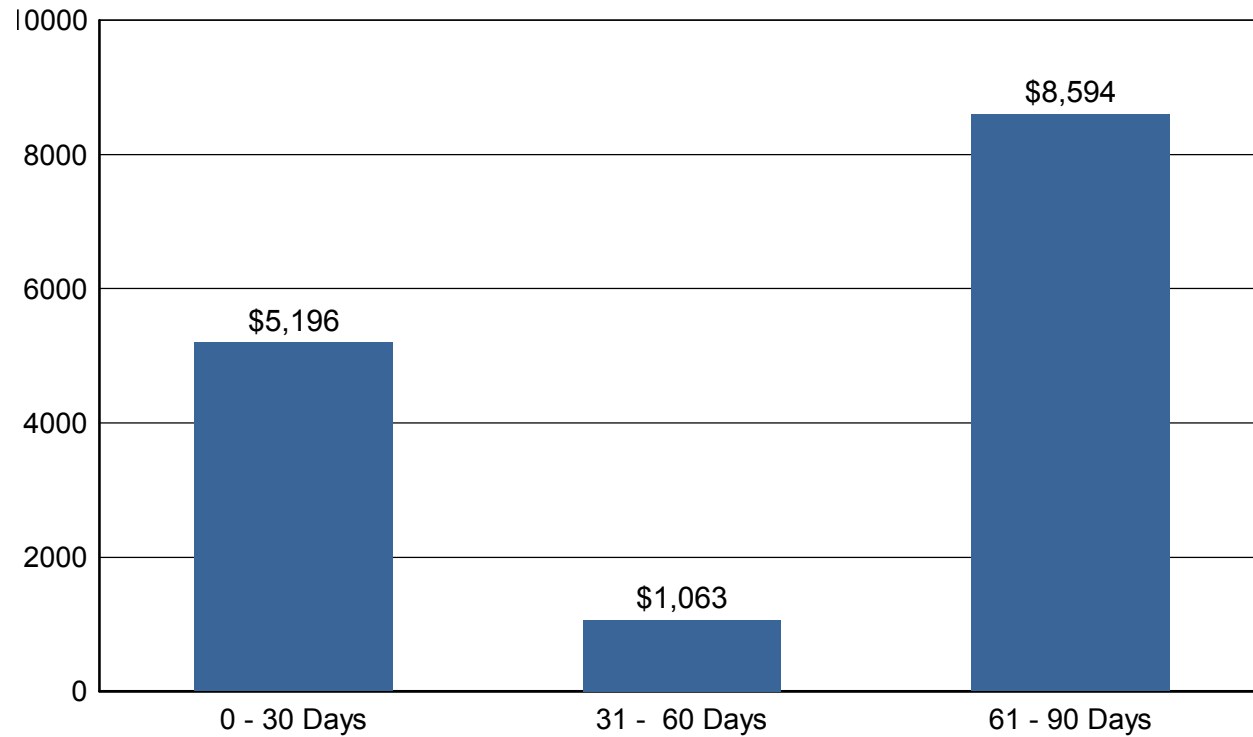
30 - 60 - 90 Forecast

30-60-90 Date Range: April 19, 2006 to July 18, 2006

12 Opportunities Totalling \$14,852.44

Opportunity Amount by Timeframe

Summary for All Users



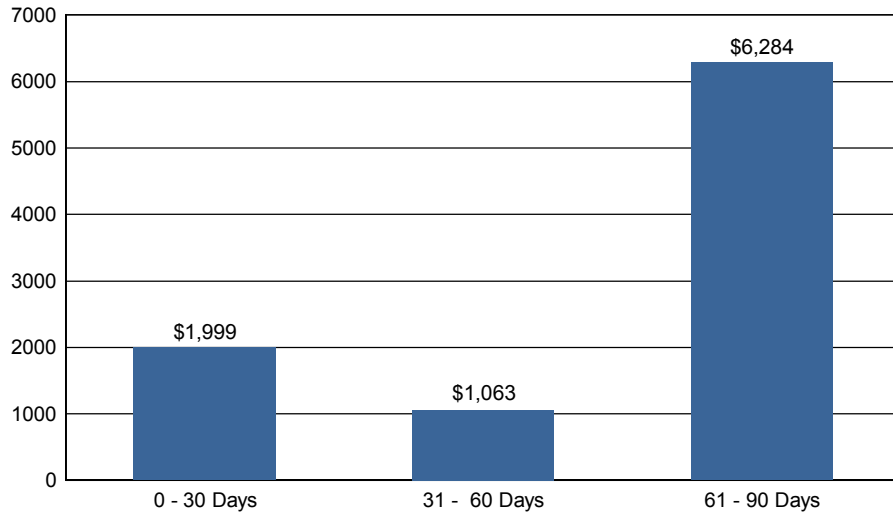
30 - 60 - 90 Forecast

30-60-90 Date Range: April 19, 2006 to July 18, 2006

Allison Mikola: 5 Opportunities Totalling \$9,345.10

Opportunity Amount by Timeframe

For Allison Mikola



Est. Close	Company	Contact	Opportunity Name	Days Open	%	Amount
0 - 30 Days: 1 Opportunities Totalling \$1,999.00						
5/18/2006	Swing Software	Ivan A. Stekopick	New Opportunity	327	80%	\$1,999.00
31 - 60 Days: 1 Opportunities Totalling \$1,062.50						
5/29/2006	Ace Pet Store	Sandy Ryan	New Opportunity	-11	90%	\$1,062.50
61 - 90 Days: 3 Opportunities Totalling \$6,283.60						
7/10/2006	County Tennis Supplies	Chris Burn	New Opportunity	-11	90%	\$2,190.00
7/13/2006	Manxsys Financial	Alexander O'Brien	Initial Order	15	100%	\$3,418.60
7/13/2006	Boomer's Artworx	Emily Dunn	New Opportunity	-11	10%	\$675.00

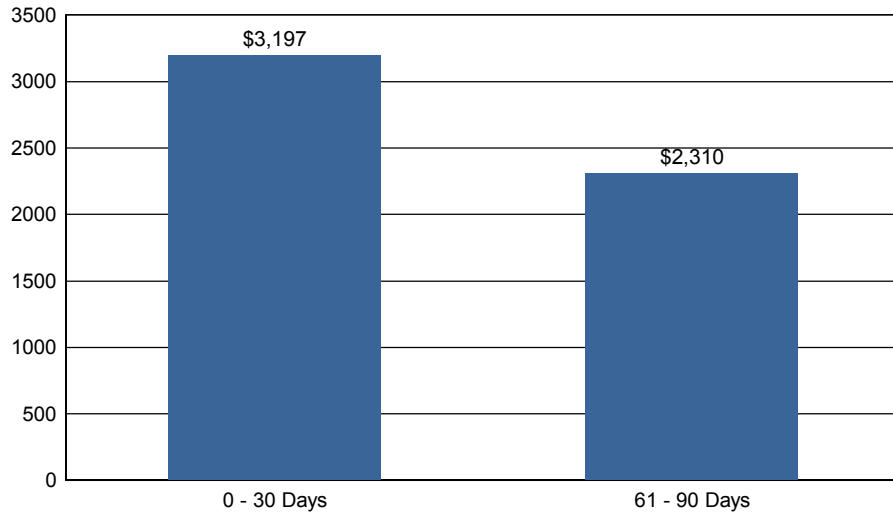
30 - 60 - 90 Forecast

30-60-90 Date Range: April 19, 2006 to July 18, 2006

Chris Huffman: 7 Opportunities Totalling \$5,507.34

Opportunity Amount by Timeframe

For Chris Huffman



Est. Close	Company	Contact	Opportunity Name	Days Open	%	Amount
0 - 30 Days: 4 Opportunities Totalling \$3,196.94						
4/22/2006	Brandee's Bakery	Liz Dittmeier	Monthly Order 1	15	100%	\$647.35
4/24/2006	Prospect Boutique	Emma Francis	Initial order - retail shop	16	100%	\$676.46
4/27/2006	Black Forest Baking	Kristi Elmendorf	Initial order - bakery	16	100%	\$1,789.13
4/28/2006	Verge Records	Drew McLintock	New Opportunity	15	100%	\$84.00
61 - 90 Days: 3 Opportunities Totalling \$2,310.40						
6/19/2006	ABS Garages Ltd	Ania Dawson	Special Promotion	-27	25%	\$425.00
6/19/2006	Ace Pet Store	Colleen McCarthy	Retail Deal	-27	90%	\$750.40
6/19/2006	Jake Flakes Inc.	Rudy Nordstrom	Special Deal	-27	65%	\$1,135.00

Competitive Analysis - Who are we up against?

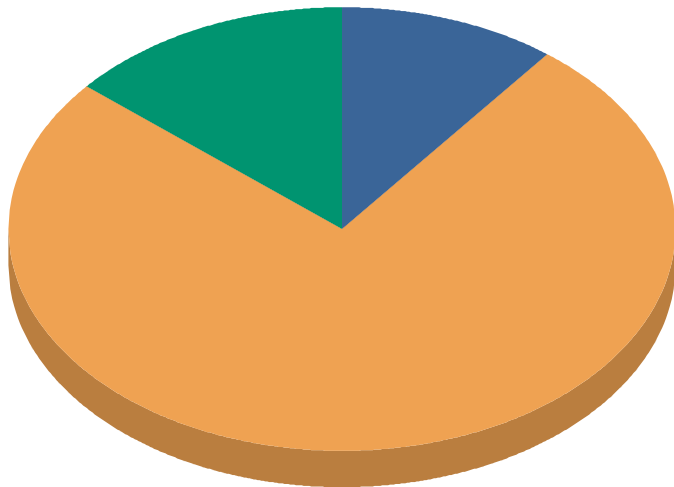
Date Range: After March 1, 2006

Opportunity Status: Closed - Won

12 Opportunities Totalling \$37,476.11

Opportunity Amount by Competitor

Summary for All Users



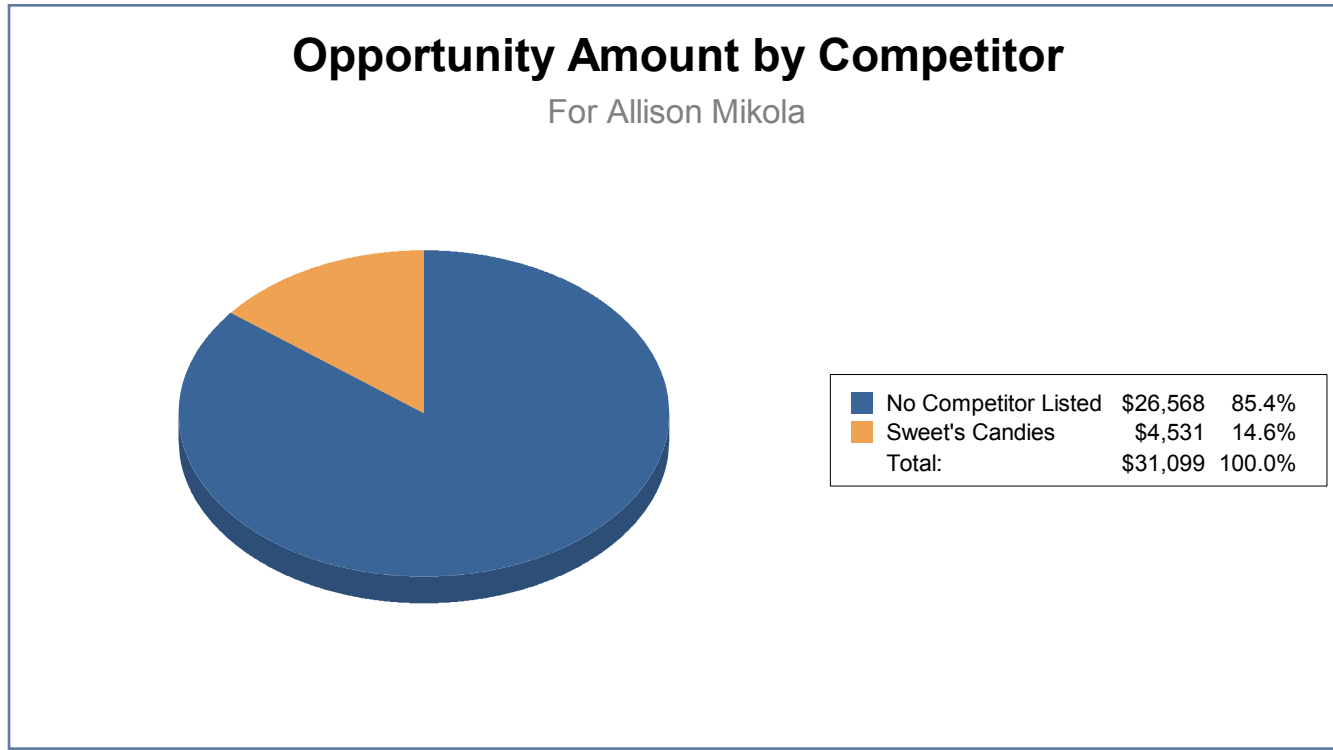
AU Chocolates and Gifts	\$3,941	10.5%
No Competitor Listed	\$28,358	75.7%
Sweet's Candies	\$5,178	13.8%
Total:	\$37,476	100.0%

Competitive Analysis - Who are we up against?

Date Range: After March 1, 2006

Opportunity Status: Closed - Won

Allison Mikola: 8 Opportunities Totalling \$31,099.13



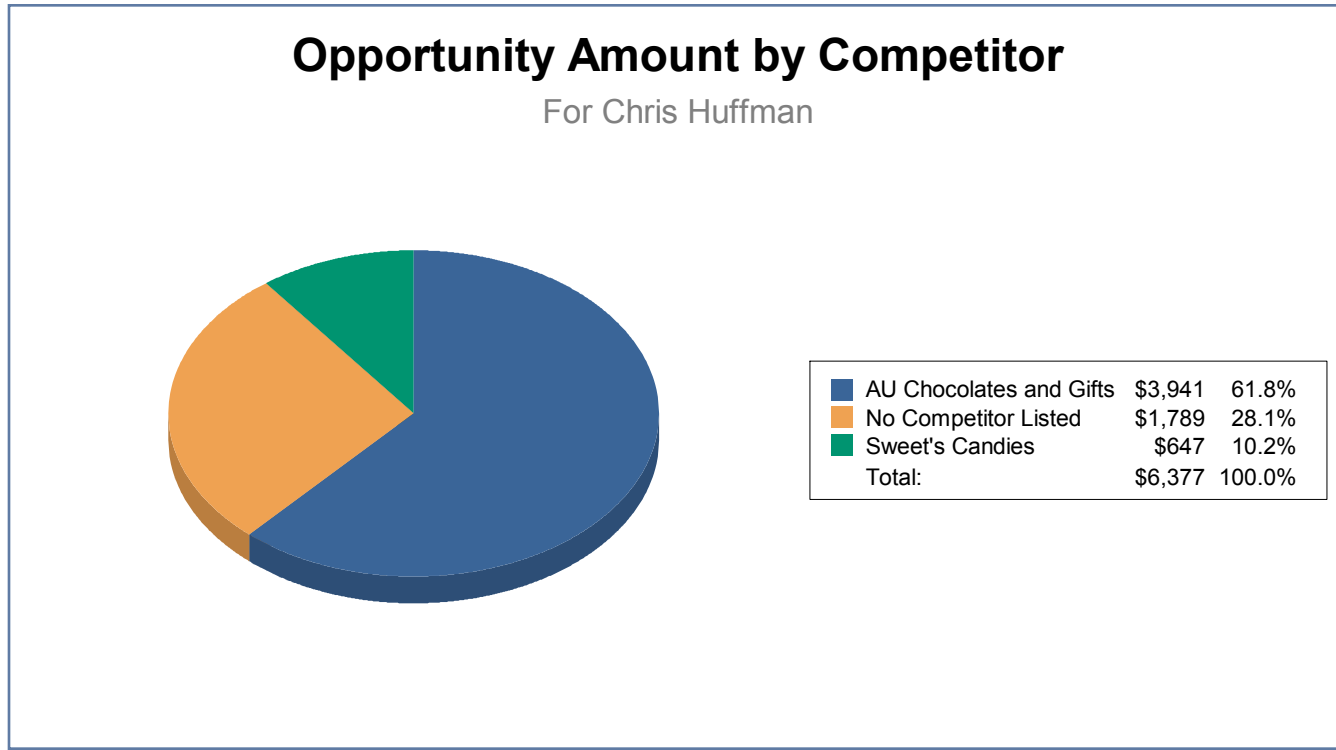
Close Date	Company	Contact	Opportunity Name	Reason	Amount
No Competitor Listed: 6 Opportunities Totalling \$26,568.45					
1/27/2007	SimAero	Bruce Baker	Customer Appreciation	Presentation	\$419.70
4/29/2007	American Dreams	Kristi Cameron	Initial Order		\$1,998.50
4/29/2007	Corleone's Pasta Company	Morty Manicotti	Store opening		\$14,396.00
4/29/2007	Manxsys Financial	Alexander O'Brien	Initial Order		\$3,418.60
5/29/2007	Continental Energy	Herman Getter	Employee gifts		\$5,571.50
5/29/2007	KKQS Radio	Bill Craig	Coffee Service - Quarterly order 3		\$764.15
Sweet's Candies: 2 Opportunities Totalling \$4,530.68					
4/29/2007	Circle Photography	Jonathan Jenkins	New Opportunity		\$4,099.11
5/29/2007	Brandee's Bakery	Liz Dittmeier	Monthly Order 2		\$431.57

Competitive Analysis - Who are we up against?

Date Range: After March 1, 2006

Opportunity Status: Closed - Won

Chris Huffman: 4 Opportunities Totalling \$6,376.99



Close Date	Company	Contact	Opportunity Name	Reason	Amount
AU Chocolates and Gifts: 2 Opportunities Totalling \$3,940.51					
3/7/2006	Ace Pet Store	Sandy Ryan	Christmas Promotion	Loved the bundle idea	\$942.01
4/29/2007	HAL's Consulting Corp	Lames Jawson	Catalog fulfillment		\$2,998.50
No Competitor Listed: 1 Opportunities Totalling \$1,789.13					
2/20/2007	Black Forest Baking	Kristi Elmendorf	Initial order - bakery	Good Price	\$1,789.13
Sweet's Candies: 1 Opportunities Totalling \$647.35					
2/2/2007	Brandee's Bakery	Liz Dittmeier	Monthly Order 1	Price	\$647.35

Competitive Analysis - Why do we Win?

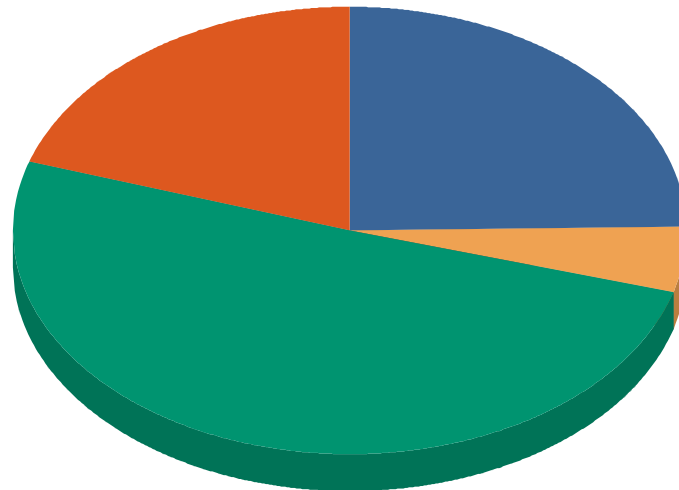
Date Range: After March 31, 2006

Opportunity Status: Closed - Won

6 Opportunities Totalling \$7,262.62

Opportunity Amount by Reason

Summary for All Users



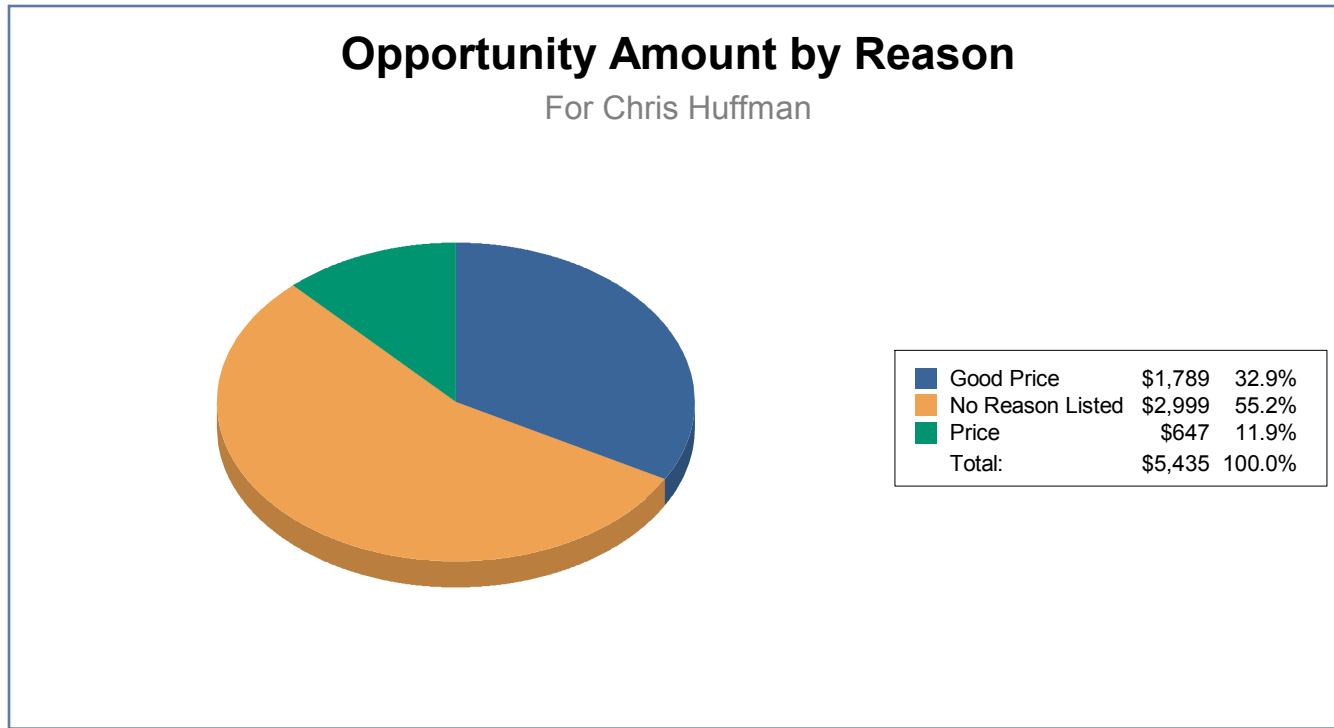
Good Price	\$1,789	24.6%
Loved the bundle idea	\$342	4.7%
No Reason Listed	\$3,675	50.6%
Price	\$1,456	20.1%
Total:	\$7,263	100.0%

Competitive Analysis - Why do we Win?

Date Range: After March 31, 2006

Opportunity Status: Closed - Won

Chris Huffman: 3 Opportunities Totalling \$5,434.98



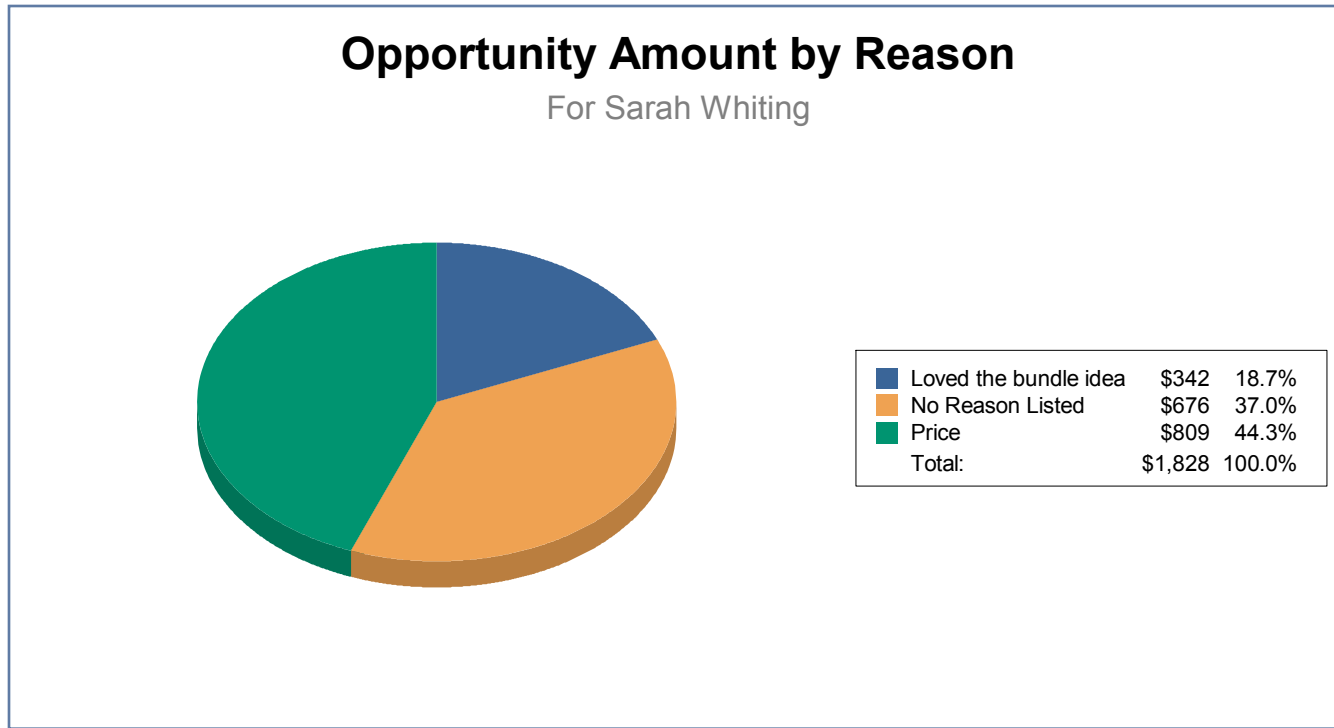
Close Date	Company	Contact	Opportunity Name	Competitor	Amount
Good Price: 1 Opportunities Totalling \$1,789.13					
2/20/2007	Black Forest Baking	Kristi Elmendorf	Initial order - bakery		\$1,789.13
No Reason Listed: 1 Opportunities Totalling \$2,998.50					
4/29/2007	HAL's Consulting Corp	Lames Jawson	Catalog fulfillment	AU Chocolates and Gifts	\$2,998.50
Price: 1 Opportunities Totalling \$647.35					
2/2/2007	Brandee's Bakery	Liz Dittmeier	Monthly Order 1	Sweet's Candies	\$647.35

Competitive Analysis - Why do we Win?

Date Range: After March 31, 2006

Opportunity Status: Closed - Won

Sarah Whiting: 3 Opportunities Totalling \$1,827.64



Close Date	Company	Contact	Opportunity Name	Competitor	Amount
Loved the bundle idea: 1 Opportunities Totalling \$342.08					
4/25/2007	Black Forest Baking	Kristi Elmendorf	Re-order		\$342.08
No Reason Listed: 1 Opportunities Totalling \$676.46					
5/29/2007	Prospect Boutique	Emma Francis	Initial order - retail shop		\$676.46
Price: 1 Opportunities Totalling \$809.10					
2/5/2007	KKQS Radio	Bill Craig	Coffee Service - Quarterly order		\$809.10

Marketing Campaign Analysis

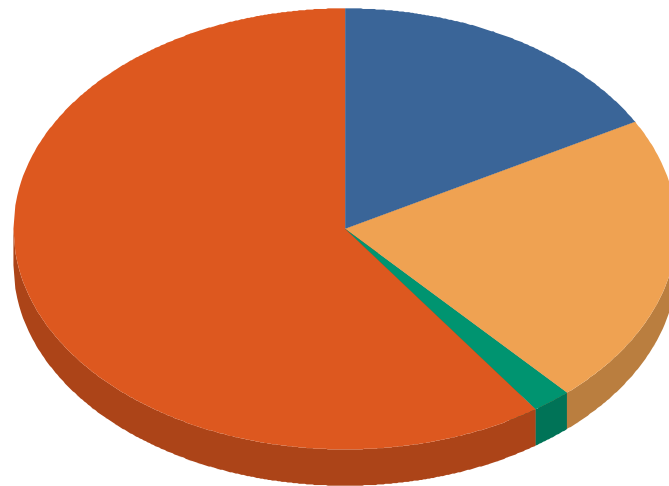
Date Range: After April 1, 2006

Opportunity Status: Closed - Won

10 Opportunities Totalling \$33,115.51

Opportunity Amount by Campaign

Summary for All Users



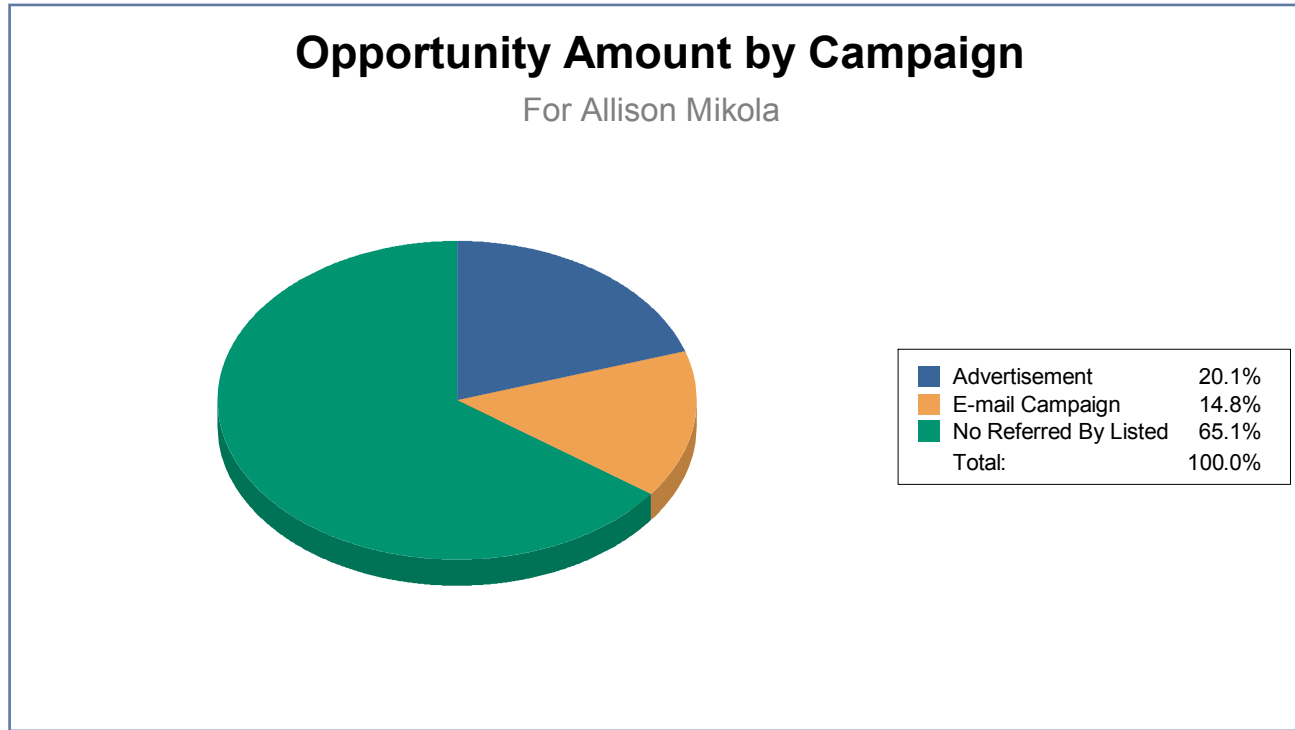
Advertisement	\$5,572	16.8%
E-mail Campaign	\$7,098	21.4%
E-mail Campaign	\$647	2.0%
No Referred By Listed	\$19,799	59.8%
Total:	\$33,116	100.0%

Marketing Campaign Analysis

Date Range: After April 1, 2006

Opportunity Status: Closed - Won

Allison Mikola: 7 Opportunities Totalling \$27,680.53



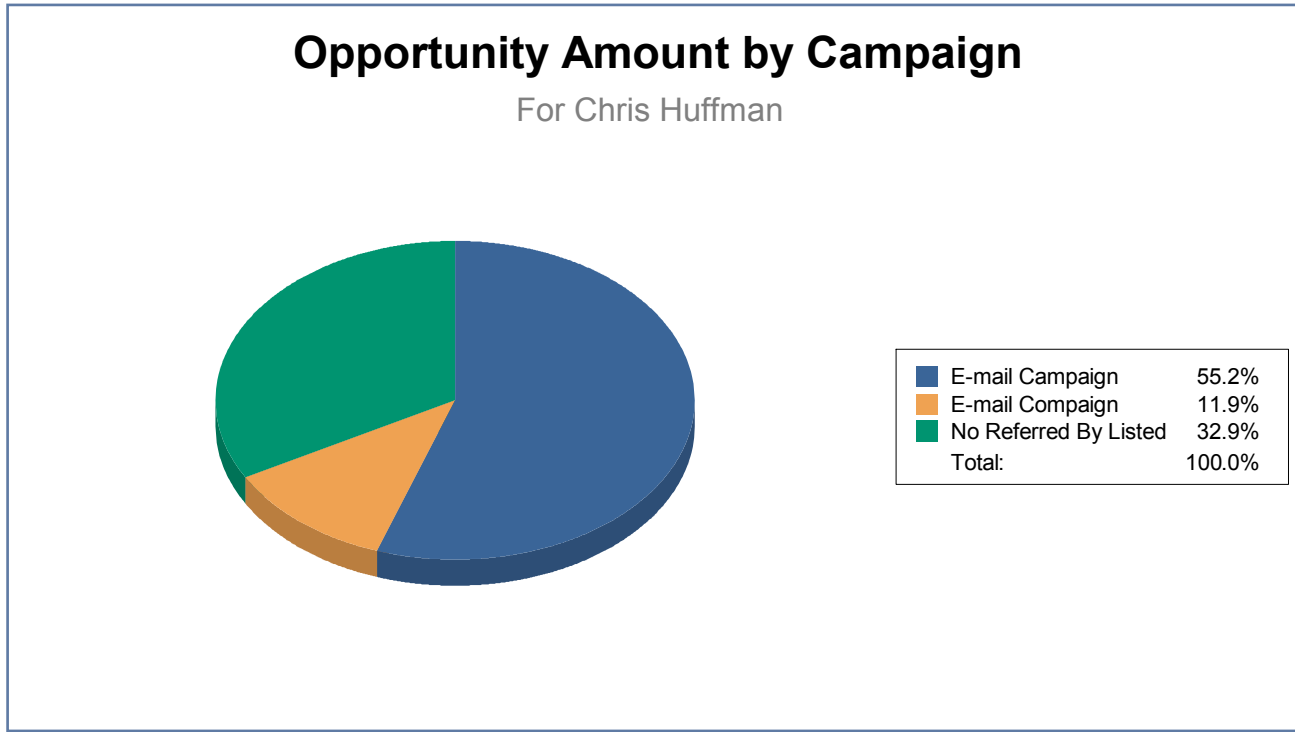
Close Date	Company	Contact	Opportunity Name	Reason	Amount
Advertisement: 1 Opportunities Totalling \$5,571.50					
5/29/2007	Continental Energy	Herman Getter	Employee gifts		\$5,571.50
E-mail Campaign: 1 Opportunities Totalling \$4,099.11					
4/29/2007	Circle Photography	Jonathan Jenkins	New Opportunity		\$4,099.11
No Referred By Listed: 5 Opportunities Totalling \$18,009.92					
1/27/2007	SimAero	Bruce Baker	Customer Appreciation	Presentation	\$419.70
4/29/2007	American Dreams	Kristi Cameron	Initial Order		\$1,998.50
4/29/2007	Corleone's Pasta Company	Morty Manicotti	Store opening		\$14,396.00
5/29/2007	Brandee's Bakery	Liz Dittmeier	Monthly Order 2		\$431.57
5/29/2007	KKQS Radio	Bill Craig	Coffee Service - Quarterly order 3		\$764.15

Marketing Campaign Analysis

Date Range: After April 1, 2006

Opportunity Status: Closed - Won

Chris Huffman: 3 Opportunities Totalling \$5,434.98



Close Date	Company	Contact	Opportunity Name	Reason	Amount
E-mail Campaign: 1 Opportunities Totalling \$2,998.50					
4/29/2007	HAL's Consulting Corp	Lames Jawson	Catalog fulfillment		\$2,998.50
E-mail Campaign: 1 Opportunities Totalling \$647.35					
2/2/2007	Brandee's Bakery	Liz Dittmeier	Monthly Order 1	Price	\$647.35
No Referred By Listed: 1 Opportunities Totalling \$1,789.13					
2/20/2007	Black Forest Baking	Kristi Elmendorf	Initial order - bakery	Good Price	\$1,789.13

Opportunity Activity Report

Date Range: March 1, 2006 to March 31, 2006

	New	Updated	Won
Total	15	3	3
Allison Mikola	10	3	2
Ernst Anderson	5	0	1

Opportunity Activity Report

Date Range: March 1, 2006 to March 31, 2006

Allison Mikola

Total Activity	New	Updated	Won
15	10	3	2

Company	Contact	Date	Regarding & Details
New			
Ace Pet Store	Colleen McCarthy	3/28/2006	Point of Purchase Display - ACT! Sales Cycle: Initial Communication 10%
American Dreams	Hayleigh Frieda	3/28/2006	Online catalog - ACT! Sales Cycle: Initial Communication 10%
Brandee's Bakery	Mackenzie Jensen	3/28/2006	Initial order for bakery ACT! Sales Cycle Initial Communication 10% Tuesday, March 02, 2004 2:07:39 PM
Continental Energy	Herman Getter	3/28/2006	Employee gifts - ACT! Sales Cycle: Initial Communication 10%
MegaGadgets Catalog Co.	Ethan Campbell	3/28/2006	MegaGadgets Catalog Gift Basket section - ACT! Sales Cycle: Initial Communication 10%
Mix Alliance	Brian David	3/28/2006	Corporate Gifts for clients ACT! Sales Cycle Initial Communication 10% Tuesday, March 02, 2004 1:09:43 PM
Modern Electric Supply	Thomas Andrews	3/28/2006	Corporate Gifts - ACT! Sales Cycle: Initial Communication 10%
SimAero	Bruce Baker	3/28/2006	Customer Appreciation - ACT! Sales Cycle: Initial Communication 10%
Tiny Town Productions	Ashley Allan	3/28/2006	Gift Baskets for Advertisers - ACT! Sales Cycle: Initial Communication 10%
Verge Records	Theodore Barrett Jr	3/28/2006	Gifts for Clients and Talent - ACT! Sales Cycle: Initial Communication 10%
Updated			
Ace Pet Store	Colleen McCarthy	3/28/2006	Point of Purchase Display - ACT! Sales Cycle: Needs Assessment 25%
Ace Pet Store	Colleen McCarthy	3/28/2006	Point of Purchase Display - ACT! Sales Cycle: Presentation 40%
Boomer's Artworx	Emily Dunn	3/28/2006	Coffee Service - ACT! Sales Cycle: Presentation 40%
Won			
Circle Photography	Jonathan Jenkins	3/21/2006	New Opportunity Closed - Won Monday, June 27, 2005 7:05:31 PM
Continental Energy	Herman Getter	3/28/2006	Employee gifts Closed - Won

Opportunity Activity Report

Date Range: March 1, 2006 to March 31, 2006

Ernst Anderson

Total Activity	New	Won
6	5	1

Company	Contact	Date	Regarding & Details
New			
Brandee's Bakery	Liz Dittmeier	3/28/2006	Monthly Order 1 - ACT! Sales Cycle: Initial Communication 10%
Brandee's Bakery	Liz Dittmeier	3/28/2006	Monthly Order 2 - ACT! Sales Cycle: Initial Communication 10%
Interactive Gifts	Chris Fierros	3/28/2006	Initial order for retail shop - ACT! Sales Cycle: Initial Communication 10%
KKQS Radio	Bill Craig	3/28/2006	Coffee Service - ACT! Sales Cycle: Initial Communication 10%
KKQS Radio	Bill Craig	3/28/2006	Coffee Service - Quarterly order 2 - ACT! Sales Cycle: Initial Communication 10%
Won			
Brandee's Bakery	Liz Dittmeier	3/28/2006	Monthly Order 1 - Closed - Won

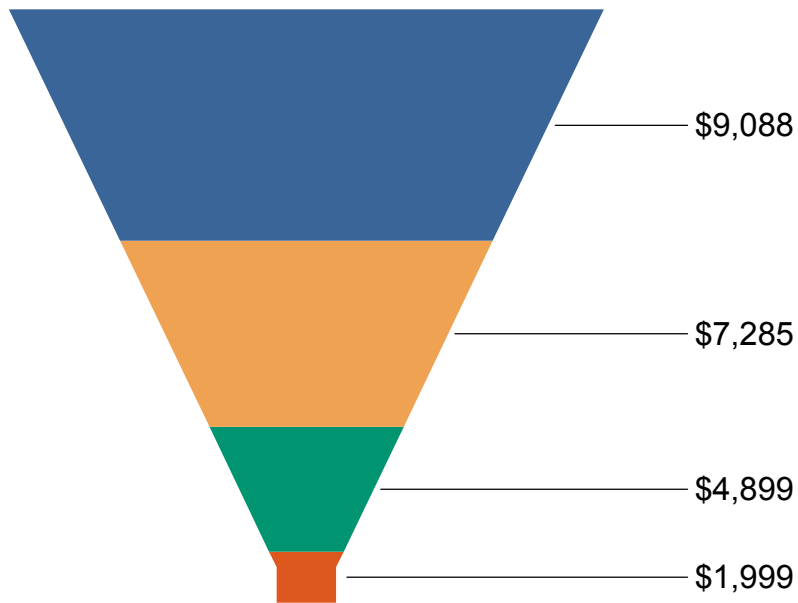
Opportunity Funnel

Date Range: After May 1, 2006

9 Opportunities Totalling \$23,271.17

Opportunity \$ by Stage

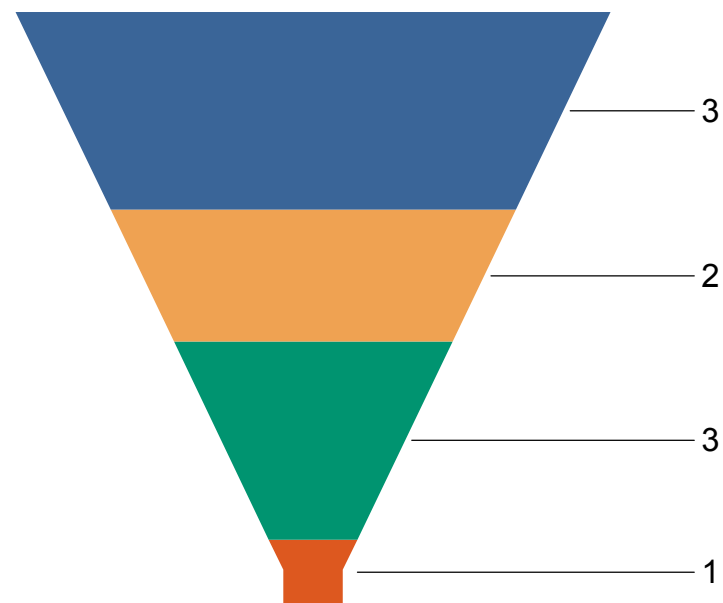
Summary for All Users



1. Initial Communication	\$9,088	39.1%
3. Presentation	\$7,285	31.3%
4. Negotiation	\$4,899	21.1%
5. Commitment to Buy	\$1,999	8.6%
Total:	\$23,271	100.0%

of Opportunities by Stage

Summary for All Users

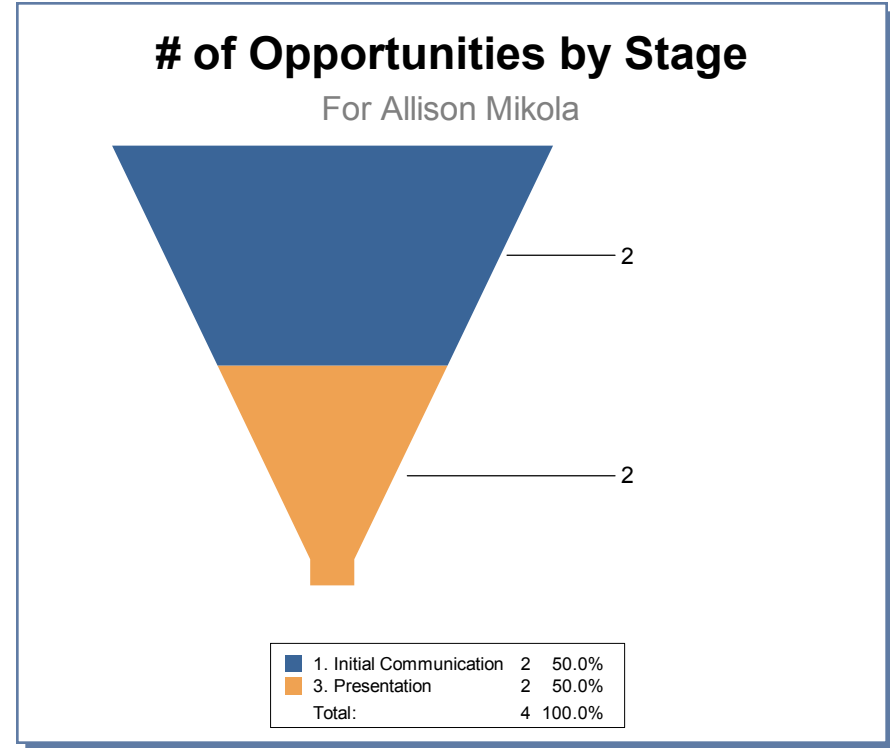
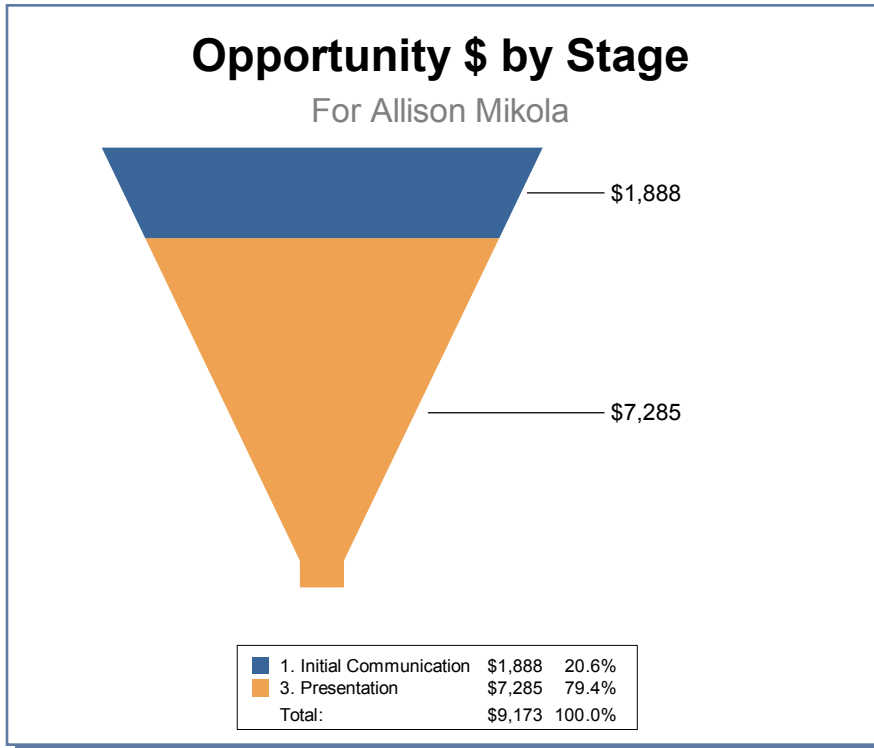


1. Initial Communication	3	33.3%
3. Presentation	2	22.2%
4. Negotiation	3	33.3%
5. Commitment to Buy	1	11.1%
Total:	9	100.0%

Opportunity Funnel

Date Range: After May 1, 2006

Allison Mikola: 4 Opportunities Totalling \$9,173.17

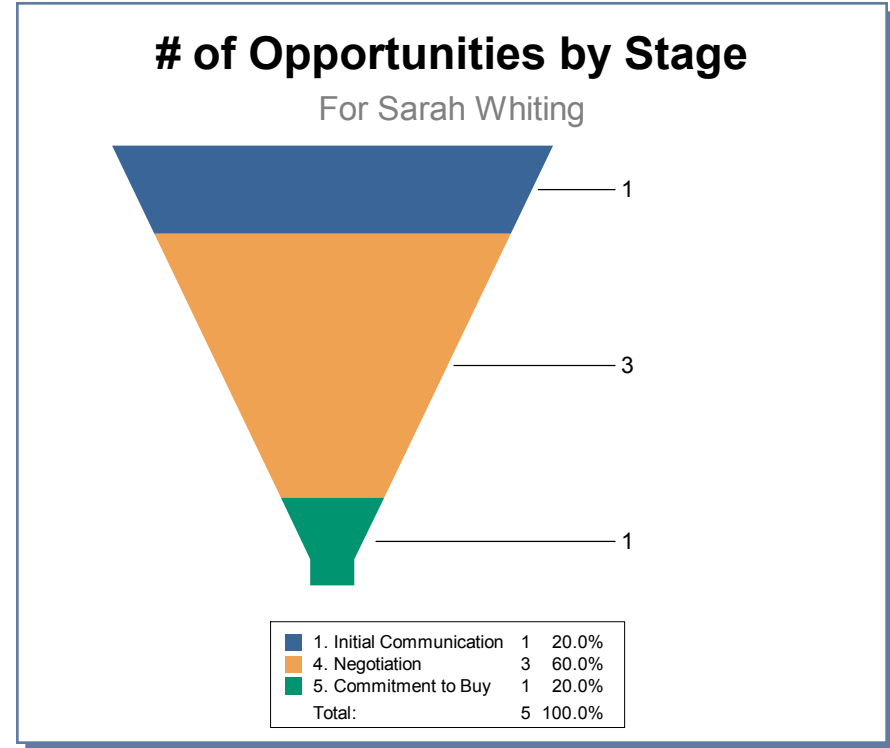
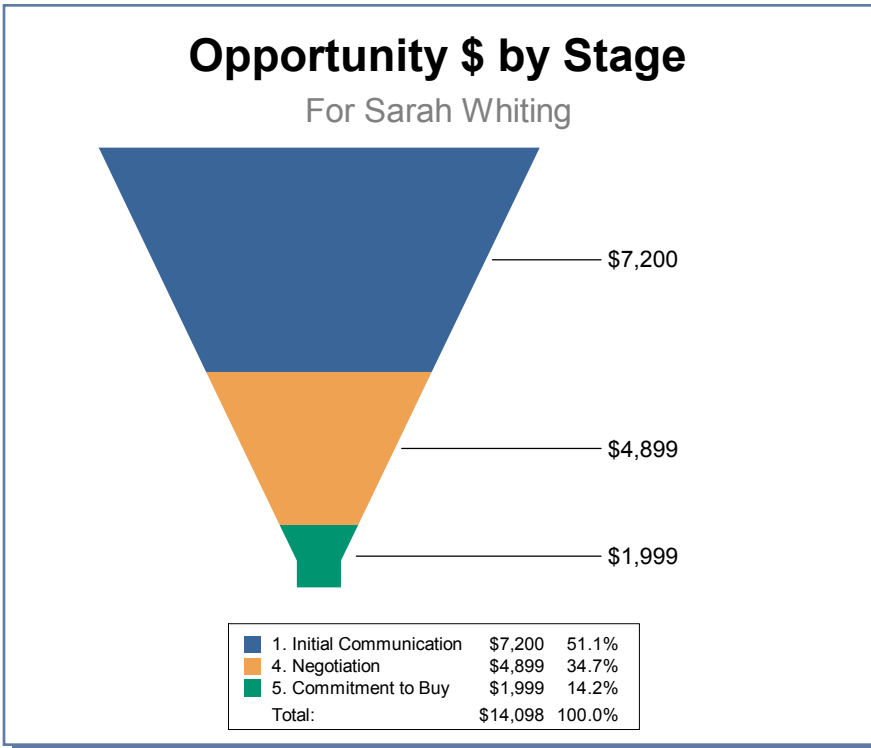


Est. Close	Company	Contact	Opportunity Name	Days Open	%	Amount
1. Initial Communication: 2 Opportunities Totalling \$1,888.48						
5/7/2006	Dittmeier Delights	Liz Dittmeier	New Opportunity	79	10%	\$825.98
5/27/2006	Ace Pet Store	Sandy Ryan	New Opportunity	79	10%	\$1,062.50
3. Presentation: 2 Opportunities Totalling \$7,284.69						
7/15/2006	Jake Flakes Inc.	Rudy Nordstrom	New Opportunity	79	40%	\$1,434.53
8/3/2006	Freemont Corp	Dylan Nguyen	Tradeshow promotion	79	40%	\$5,850.17

Opportunity Funnel

Date Range: After May 1, 2006

Sarah Whiting: 5 Opportunities Totalling \$14,098.00



Est. Close	Company	Contact	Opportunity Name	Days Open	%	Amount
1. Initial Communication: 1 Opportunities Totalling \$7,200.00						
5/21/2006	Quality Motors	Julie Britton	New Opportunity	79	10%	\$7,200.00
4. Negotiation: 3 Opportunities Totalling \$4,899.00						
5/3/2006	Goldfish Records	Annette Sharkey	New Opportunity	79	65%	\$2,649.00
5/27/2006	Arcadia Ave. Florist	Gavin Dillerstone	New Opportunity	79	65%	\$1,125.00
5/27/2006	Johnson Design & Build Partners	Gareth Cram	New Opportunity	79	65%	\$1,125.00
5. Commitment to Buy: 1 Opportunities Totalling \$1,999.00						
7/4/2006	Swing Software	Ivan A. Stekopick	New Opportunity	79	80%	\$1,999.00

Closed - Won Opportunities with Product Detail

Date Range: After January 1, 2006

Allison Mikola

2: Needs Assessment

Company	Circle Photography	Open Date	7/30/2005	Days Open	292	Probability	100%
Contact	Jonathan Jenkins	Last Edit	4/3/2006	Referred by			
Opp. Name	New Opportunity	Est. Close	5/18/2006	Competitor			

Product	Quantity	Cost	Price	Discount	Adj. Price	Total
Sunday Park Basket	15.00	\$42.60	\$96.00	0.00%	\$96.00	\$1,440.00
						\$1,440.00

1: Initial Communication

Company	KKQS Radio	Open Date	5/22/2006	Days Open	-35	Probability	100%
Contact	Bill Craig	Last Edit	4/3/2006	Referred by			
Opp. Name	Coffee Service - Quarterly order 3	Est. Close	4/17/2006	Competitor			

Product	Quantity	Cost	Price	Discount	Adj. Price	Total
Bulk Coffee	85.00	\$3.75	\$8.99	0.00%	\$8.99	\$764.15
						\$764.15

Closed - Won Opportunities with Product Detail

Date Range: After January 1, 2006

Chris Huffman

4: Negotiation

Company	Ace Pet Store	Open Date	4/29/2006	Days Open	32	Probability	100%
Contact	Sandy Ryan	Last Edit	4/3/2006	Referred by	Trade Show		
Opp. Name	Christmas Promotion	Est. Close	4/27/2006	Competitor	AU Chocolates and Gifts		

Product	Quantity	Cost	Price	Discount	Adj. Price	Total
Bulk Chocolate	50.00	\$6.49	\$10.99	0.00%	\$10.99	\$549.50
Bulk Coffee	50.00	\$3.75	\$8.99	0.13%	\$7.85	\$392.50
						\$942.00

1: Initial Communication

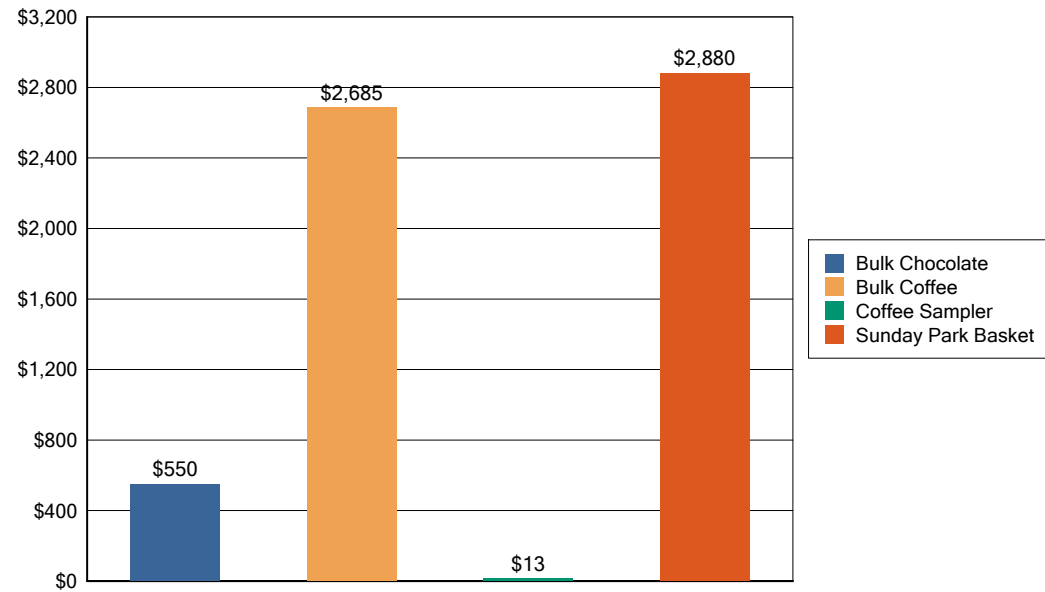
Company	Hospital de la Gente	Open Date	4/25/2006	Days Open	-3	Probability	100%
Contact	Silvia Carlini	Last Edit	4/3/2006	Referred by	Web Site		
Opp. Name	Testing Chocolate Sampler	Est. Close	5/2/2006	Competitor	Sweet's Candies		

Product	Quantity	Cost	Price	Discount	Adj. Price	Total
Coffee Sampler	1.00	\$6.49	\$12.99	0.00%	\$12.99	\$12.99
						\$12.99

Product Sales Analysis

Date Range: After May 1, 2005

	Total
Total	\$6,127.44
Bulk Chocolate	\$549.50
Bulk Coffee	\$2,684.95
Coffee Sampler	\$12.99
Sunday Park Basket	\$2,880.00

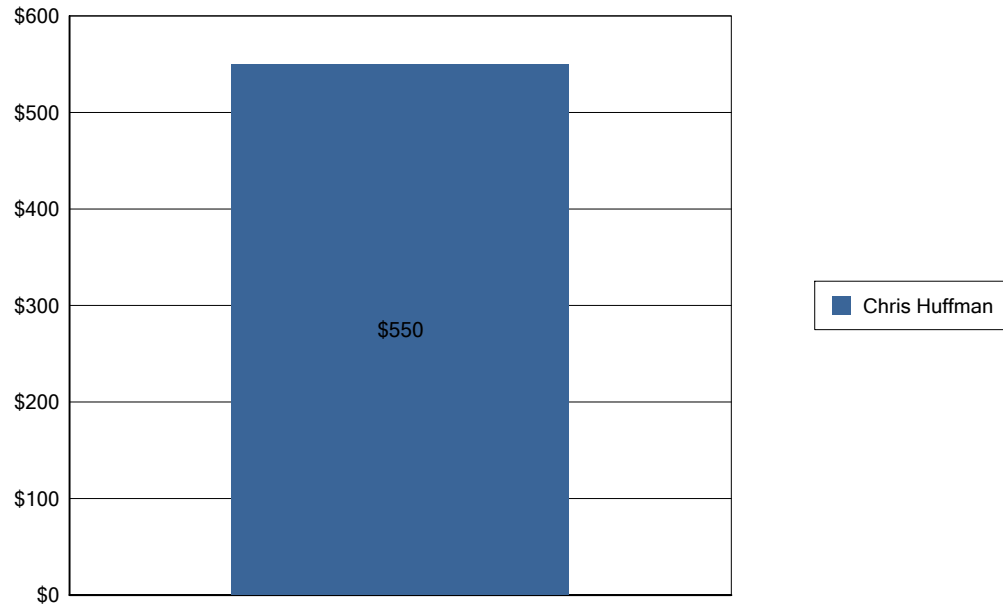


Product Sales Analysis

Date Range: After May 1, 2005

Bulk Chocolate

	Total
Total	\$549.50
Chris Huffman	\$549.50



Chris Huffman

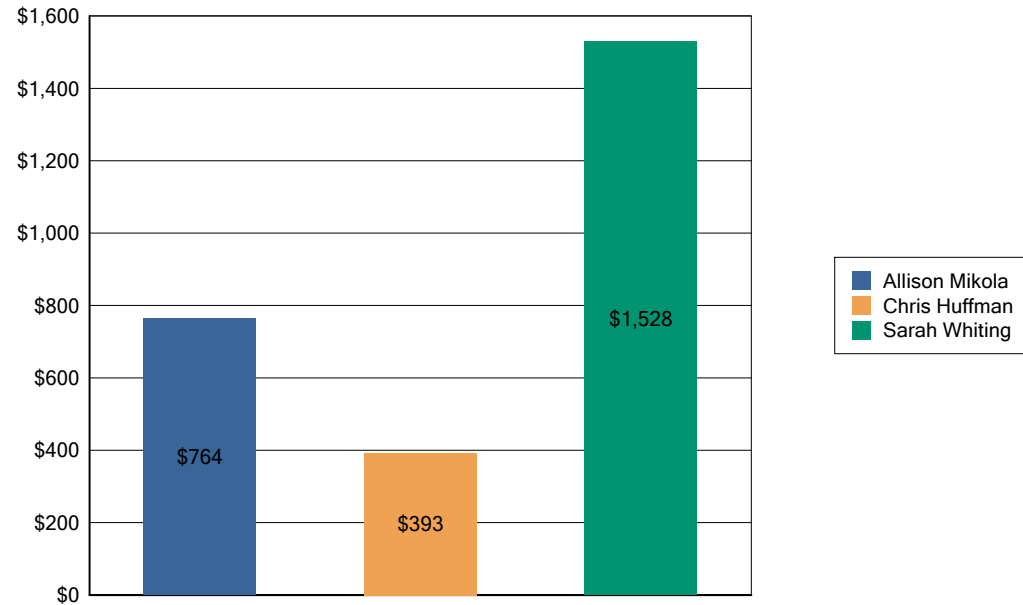
Company	Contact	Date Sold	Quantity	Cost	Price	Total
Ace Pet Store	Sandy Ryan	5/31/2006	50.00	\$6.49	\$10.99	\$549.50
			50.00			\$549.50

Product Sales Analysis

Date Range: After May 1, 2005

Bulk Coffee

	Total
Total	\$2,684.95
Allison Mikola	\$764.15
Chris Huffman	\$392.50
Sarah Whiting	\$1,528.30



Allison Mikola

Company	Contact	Date Sold	Quantity	Cost	Price	Total
KKQS Radio	Bill Craig	4/17/2006	85.00	\$3.75	\$8.99	\$764.15
			85.00			\$764.15

Chris Huffman

Company	Contact	Date Sold	Quantity	Cost	Price	Total
Ace Pet Store	Sandy Ryan	5/31/2006	50.00	\$3.75	\$8.99	\$392.50
			50.00			\$392.50

Product Sales Analysis

Date Range: After May 1, 2005

Bulk Coffee

Sarah Whiting

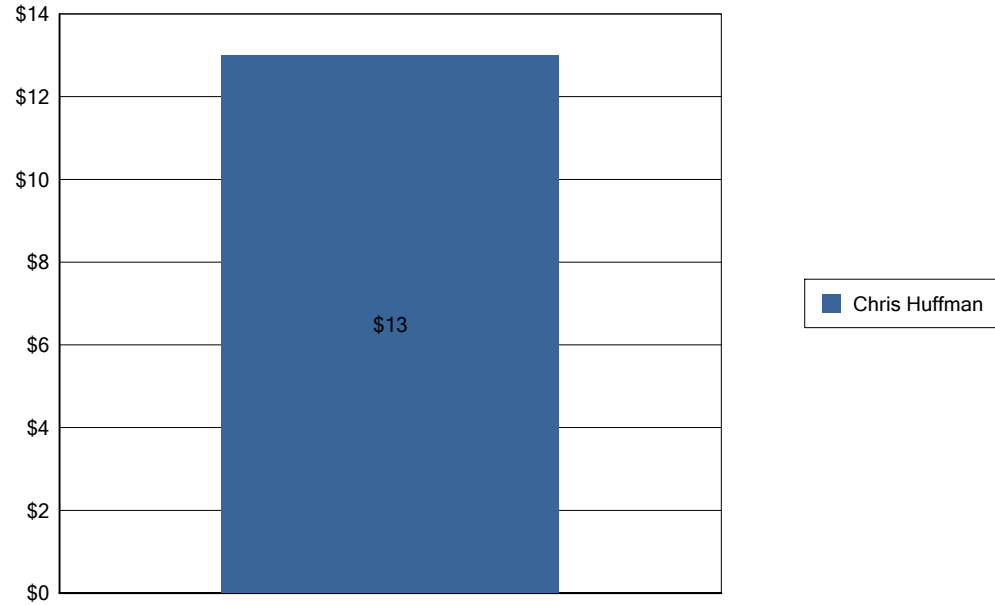
Company	Contact	Date Sold	Quantity	Cost	Price	Total
KKQS Radio	Bill Craig	5/18/2006	100.00	\$3.75	\$8.99	\$809.10
KKQS Radio	Bill Craig	5/21/2006	80.00	\$3.75	\$8.99	\$719.20
			180.00			\$1,528.30

Product Sales Analysis

Date Range: After May 1, 2005

Coffee Sampler

	Total
Total	\$12.99
Chris Huffman	\$12.99



Chris Huffman

Company	Contact	Date Sold	Quantity	Cost	Price	Total
Hospital de la Gente	Silvia Carlini	4/22/2006	1.00	\$6.49	\$12.99	\$12.99
			1.00			\$12.99

Product Sales Analysis

Date Range: After May 1, 2005

Sunday Park Basket

	Total
Total	\$2,880.00
Allison Mikola	\$1,440.00
Betty Browser	\$1,440.00



Allison Mikola

Company	Contact	Date Sold	Quantity	Cost	Price	Total
Circle Photography	Jonathan Jenkins	5/18/2006	15.00	\$42.60	\$96.00	\$1,440.00
			15.00			\$1,440.00

Betty Browser

Company	Contact	Date Sold	Quantity	Cost	Price	Total
ABS Garages Ltd	Ania Dawson	6/17/2006	15.00	\$42.60	\$96.00	\$1,440.00
			15.00			\$1,440.00