



Contact Report

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Contact				
Company	MiniSoft	Address	300 1st Ave	
Contact	Anthony Federici		New York, NY 10003	
Title	President		United States	
Phone	(212) 555-2355	Ext.	Country	United States
Mobile Phone	(212) 555-2354		E-mail	AnthonyF@tonyfed.com
Salutation	Tony		Web Site	www.minisoftny.com

Status				
ID/Status	Customer; Influencer	Last Results		
Record Manager	Chris Huffman	Last Attempt		
Referred By	Friend	Last Reach	6/11/2005	
Last edited by	Chris Huffman	Letter Date	8/15/2007	
Edited On	8/15/2007	Last Meeting	3/18/2005	
Created On	6/27/2005	Birth Date	5/25/2003	

User Fields				
User 1		User 6		
User 2		User 7		
User 3		User 8		
User 4		User 9		
User 5		User 10		

Home Address				
Home Phone	(480) 557-888	Ext.	Home Address	1433 E. Norwood St.
Pager Phone		Ext.		
Personal E-mail				Mesa, AZ 85207
IM ID	anthonyminisoft	Home Country	United States	
Spouse	Debbie			

Secondary Contacts				
Contact	Title	E-mail	Phone	Ext.
Mini Federici	Daughter	minif@minisoft.com		

Notes				
Date	Time	Regarding	Record Manager	
Date Range: All Dates				
2/13/2005	1:10 PM	First visit to CH Gourmet Gifts website	Melissa Pearce	
2/13/2005	1:15 PM	Signed up for e-mail newsletter	Melissa Pearce	
2/13/2005	1:20 PM	Tony was referred by David Davis.	Chris Huffman	
6/1/2005	12:30 PM	Turns out Tony knows Ethan... they are good old Fraternity brothers from Indiana University. Bumped into the both of them out to eat at Rattlers the other night.	Allison Mikola	
<p>Idea:: They go way back... good way to encourage more business is to talk about all the products Tony has bought!</p>				
6/11/2005	4:54 PM	Web presentation went very well for the new offering of Truffle Sampler . Lot's of interest among the group.	Chris Huffman	

History				
Date Range: All Dates				
Result	Date	Time	Regarding & Details	Record Manager



Contact Report

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Call Completed	1/13/2005	12:30 PM	Get the order Tony has not requested any additional information since his initial visit to the website. It turns out he had simply forgotten to come back after his initial visit to place an order.	Chris Huffman
New Opportunity	3/2/2005	4:50 PM	Corporate gifts - ACT! Sales Cycle: Initial Communication 10%	Chris Huffman
Meeting Held	3/18/2005	6:30 PM	Tennis at the club	Chris Huffman
Call Completed	6/11/2005	4:00 PM	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234-2342-33234	Chris Huffman
Field Changed	7/29/2005	12:30 AM	Field ID/Status changed from "Customer" to "Customer; Influencer"	Chris Huffman
Letter Sent	8/15/2007	1:31 PM	sent proposal	Chris Huffman

Activities		Date Range: All Dates				
<u>Type</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>
Call	8/11/2003	4:00 PM	1 hour	Low	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234234233234	Chris Huffman

Opportunities		Date Range: All Dates				
<u>Status</u>	<u>Name</u>	<u>Est. Close</u>	<u>Stage</u>	<u>Prob.</u>	<u>Total</u>	<u>Record Manager</u>
Inactive	Corporate gifts	8/8/2004	Initial Communication	10%	\$251.93	Sarah Whiting



Contact Directory

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Number of Contacts: 29

Contact

Company	SimAero	Address	555 Bayale Dr.
Contact	Bruce Baker		Suite 2
Title	Chief Designer		Picacho, AZ 85111
Phone	(480) 555-2144	Country	United States
Mobile Phone	(602) 555-4444	E-mail	Bruce@simaero360.com
Salutation	Buzz	Web Site	www.simaero360.com

Home Address

Home Phone	(520) 555-0642	Ext.	Home Address	6834 E. Misho Ln.
Pager Phone		Ext.		Apt 546
Personal E-mail				Casa Grande, AZ 85666
Messenger ID			Home Country	United States
Spouse	Marie			

Contact

Company	Verge Records	Address	4589 N. Taylor St.
Contact	Theodore Barrett Jr		Suite 50
Title	Chief Engineer		Seattle, WA 98155
Phone	(206) 555-4414	Country	United States
Mobile Phone	(206) 555-2444	E-mail	Theo@vergerecords.com
Salutation	Ted	Web Site	www.vergerecords.com

Home Address

Home Phone	(206) 555-1019	Ext.	Home Address	13941 Martin Way
Pager Phone		Ext.		# 1125
Personal E-mail				Bellevue, WA 98006
Messenger ID			Home Country	United States
Spouse				

Contact

Company	Verge Records	Address	4589 N. Taylor St.
Contact	Theodore Barrett Sr		Suite 50
Title	CEO		Seattle, WA 98155
Phone	(206) 555-4410	Country	United States
Mobile Phone	(206) 555-2444	E-mail	
Salutation	Theodore	Web Site	www.vergerecords.com

Home Address

Home Phone	(206) 555-1019	Ext.	Home Address	13941 Martin Way
Pager Phone		Ext.		# 1125
Personal E-mail				Bellevue, WA 98006
Messenger ID			Home Country	United States
Spouse				



Phone List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of contacts: 21

<u>Company</u>	<u>Contact</u>	<u>Phone</u>	<u>Phone Ext</u>
Arcadia Ave. Florist	Jim Curtis	(602) 555-4412	
Boomer's Artworx	Emily Dunn	(602) 555-4874	
Boomer's Artworx	Bettie James		
Corleone's Pasta Company	Morty Manicotti	(480) 555-4512	
Jake Flakes Inc.	Bella Minoal		
Jake Flakes Inc.	Rudy Nordstrom	(480) 555-2211	
KKQS Radio	Bill Craig	(480) 555-2146	
Mad House;The	Greg Hart	(310) 555-2244	
MiniSoft	George Limnoff	(480) 555-2144	
Mutthound Enterprises	Steve Reese	(480) 555-2564	
Nagengast Estate Winery	Scott Nagengast	(805) 555-2222	
Searchlight Casting	Gracie Anderson	(480) 555-3764	
Sewing Room;The	Danielle Middlebury	(415) 555-2242	
Sierra's Cafe	Brandon Sloan	(562) 555-2142	
SimAero	Bruce Baker	(480) 555-2144	
Slamitonabingbong Industries	Kyle Wetmore	(480) 555-2146	
Tiny Town Productions	Ashley Allan	(480) 555-2451	
UZI International	Wilhelm Loke	(310) 555-2454	
Widget Corporation	Max Headlong		
Willis Enterprises	Bill Willis	(480) 555-1232	
Yellow Jersey Bike Shop	Lance J. Parker	(619) 555-8893	



Activities

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Date Range: All Dates

Contact							
<u>Type</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	
Contact		Ashley Allan			Tiny Town Productions		(480) 555-2451
Call	8/11/2003	4:00 PM	1 hour	Low	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234234233234	Chris Huffman	
Meeting	11/15/2005	12:00 PM	2 hours	Low	Lunch Meeting	Chris Huffman	
Contact		Gracie Anderson			Searchlight Casting		(480) 555-3764
Meeting	4/15/2003	6:00 PM	1 hour 30 minutes	Low	Contract Negotiations for upcoming executive retreat	Chris Huffman	
Call	1/9/2006	1:00 AM	0 minutes	Low	Follow up on special basket order for company meeting	Chris Huffman	
Contact		Bruce Baker			SimAero		(480) 555-2144
Call	8/11/2003	4:00 PM	1 hour	Low	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234234233234	Chris Huffman	
Call	11/21/2005	2:00 PM	10 minutes	Low	Follow up on Sales Presentation	Chris Huffman	
Contact		Bill Craig			KKQS Radio		(480) 555-2146
Call	8/11/2003	4:00 PM	1 hour	Low	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234234233234	Chris Huffman	
Contact		Jim Curtis			Arcadia Ave. Florist		(602) 555-4412
Meeting	8/8/2005	11:00 AM	1 hour	Low	Demonstration	Chris Huffman	
Contact		Emily Dunn			Boomer's Artworx		(602) 555-4874
To-do	10/2/2005	1:00 AM	5 minutes	Low	Send Quote	Chris Huffman	
To-do	5/20/2006	1:30 PM	1 hour 30 minutes	High	Assemble Catalogs	Chris Huffman	
Contact		Greg Hart			Mad House; The		(310) 555-2244
<u>Type</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	



Notes/History

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Date Range - All Dates

Contact	Ashley Allan	Tiny Town Productions
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Histories

<u>Date</u>	<u>Time</u>	<u>Result</u>	<u>Regarding & Details</u>	<u>Record Manager</u>
6/11/2005	4:00 PM	Call Completed	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234-2342-33234	Chris Huffman
4/1/2005	1:22 PM	Opportunity Inactive	Gifts for Advertisers, clients and talent Inactive Friday, December 31, 9999 11:59:59 PM	Allison Mikola
3/2/2005	1:12 PM	New Opportunity	Gift Baskets for Advertisers - ACT! Sales Cycle: Initial Communication 10%	Allison Mikola

Notes

<u>Date</u>	<u>Time</u>	<u>Regarding</u>	<u>Record Manager</u>
6/11/2005	4:54 PM	Web presentation went very well for the new offering of Truffle Sampler . Lot's of interest among the group.	Chris Huffman
2/13/2005	1:30 PM	I received an e-mail from Ashley that Tiny Town Productions is a small production company that produces some television serials. They have occasional need for gifts baskets, bouquets, and ballon arrangements as props. They are requesting some samples to review.	Ernst Anderson
2/13/2005	1:10 PM	Signed up for e-mail newsletter	Melissa Pearce
2/13/2005	1:00 PM	First visit to CH Gourmet Gifts website	Melissa Pearce

Contact	Gracie Anderson	Searchlight Casting
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Notes

<u>Date</u>	<u>Time</u>	<u>Regarding</u>	<u>Record Manager</u>
6/9/2005	7:43 PM	Is really interested in outdoor sports. She is running a marathon in late October .	Chris Huffman
4/6/2005	7:44 PM	West valley location is located on 1-10 and Ray Road . Directions are South on I-101, West on I-10, freeway will curve south. Exit on Ray road. Turn left and storefront will be beyond the freeway.	Chris Huffman

Contact	Bruce Baker	SimAero
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Histories

<u>Date</u>	<u>Time</u>	<u>Result</u>	<u>Regarding & Details</u>	<u>Record Manager</u>
6/27/2005	2:39 PM	Opportunity Won	Customer Appreciation Closed - Won	Allison Mikola
6/13/2005	2:15 PM	Call Left Message	Returned his call	Allison Mikola



History Summary

Chris Huffman, CH Gourmet
13 East 54th St.
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Date Range: All Dates

Contact	Ashley Allan, Tiny Town Productions		
	Call Completed	Total:	1
	New Opportunity	Total:	1
	Opportunity Inactive	Total:	1
Contact	Bruce Baker, SimAero		
	Call Completed	Total:	2
	Field Changed	Total:	1
	To-do Done	Total:	1
	E-mail Sent	Total:	1
	Call Left Message	Total:	1
	Opportunity Won	Total:	1
	New Opportunity	Total:	1
Contact	Bill Craig, KKQS Radio		
	Call Completed	Total:	3
	Field Changed	Total:	1
	To-do Done	Total:	2
	Opportunity Won	Total:	2
	New Opportunity	Total:	2
Contact	Emily Dunn, Boomer's Artworx		
	E-mail Sent	Total:	1
	New Opportunity	Total:	1
	Opportunity Stage Update	Total:	1
Contact	Greg Hart, Mad House:The		
	Call Received	Total:	1
	Meeting Held	Total:	1
	E-mail Sent	Total:	1
Contact	Max Headlong, Widget Corporation		
	To-do Done	Total:	1
Contact	Bettie James, Boomer's Artworx		
	Field Changed	Total:	1
	Opportunity Won	Total:	1
	New Opportunity	Total:	1
	Opportunity Stage Update	Total:	1



History Summary Classic

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Date Range: All Dates

<u>Contact</u>	<u>Company</u>	<u>Attempted Calls</u>	<u>Completed Calls</u>	<u>Meetings Held</u>	<u>Letters Sent</u>
Ashley Allan	Tiny Town Productions	0	1	0	0
Bruce Baker	SimAero	0	2	0	0
Bill Craig	KKQS Radio	0	3	0	0
Emily Dunn	Boomer's Artworx	0	0	0	0
Greg Hart	Mad House;The	0	0	1	0
Max Headlong	Widget Corporation	0	0	0	0
Bettie James	Boomer's Artworx	0	0	0	0
Wilhelm Loke	UZI International	0	1	0	0
Morty Manicotti	Corleone's Pasta Company	0	1	0	0
Danielle Middlebury	Sewing Room;The	0	1	0	0
Scott Nagengast	Nagengast Estate Winery	0	0	0	0
Rudy Nordstrom	Jake Flakes Inc.	0	1	1	0
Lance J. Parker	Yellow Jersey Bike Shop	0	1	0	0
Steve Reese	Mutthound Enterprises	0	1	0	0
Kyle Wetmore	Slamitonabingbong Industries	0	0	0	0
Bill Willis	Willis Enterprises	0	5	1	0
Total:		0	17	3	0



History/Time Spent

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Date Range: All Dates

Contact		Ashley Allan			
<u>Result</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	
Call Completed	6/11/2005	4:00 PM	0 minutes	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234-2342-33234	
New Opportunity	3/2/2005	1:12 PM	0 minutes	Gift Baskets for Advertisers - ACT! Sales Cycle: Initial Communication 10%	
Opportunity Inactive	4/1/2005	1:22 PM	0 minutes	Gifts for Advertisers, clients and talent Inactive Friday, December 31, 9999 11:59:59 PM	
Total time		Timeless			

Contact		Bruce Baker			
<u>Result</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	
Field Changed	3/2/2005	1:31 PM	0 minutes	Customer Appreciation Old Estimated Close Date: Tuesday, July 02, 2003 New Estimated Close Date: Monday, July 21, 2003	
Call Completed	6/11/2005	4:00 PM	0 minutes	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234-2342-33234	
E-mail Sent	6/9/2005	12:28 PM	0 minutes	Subject: Gift Baskets for your Best Prospects	
Call Completed	6/9/2005	7:02 PM	0 minutes	Placed order	
Call Left Message	6/13/2005	2:15 PM	0 minutes	Returned his call	
New Opportunity	3/2/2005	1:28 PM	0 minutes	Customer Appreciation - ACT! Sales Cycle: Initial Communication 10%	
To-do Done	6/1/2005	1:00 PM	30 minutes	Faxed him latest invoice	
Opportunity Won	6/27/2005	2:39 PM	0 minutes	Customer Appreciation Closed - Won	
Total time		-28740 minute(s)			

Contact		Bill Craig			
<u>Result</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	
Field Changed	3/2/2005	2:52 PM	0 minutes	Coffee Service Old Estimated Close Date: Tuesday, March 02, 2004 New Estimated Close Date: Sunday, March 02, 2003	
Call Completed	6/11/2005	4:00 PM	0 minutes	Conference Call for group presentation of Truffle Sampler line Conference Call Details: Call In number: 1800-555-5555 Participant Code: 234-2342-33234	
Opportunity Won	6/27/2005	2:40 PM	0 minutes	Coffee Service - Quarterly order 3 Closed - Won	
Call Completed	6/13/2005	5:00 PM	0 minutes	Thank you	
To-do Done	1/13/2005	12:00 PM	0 minutes	Send follow-up letter Liked the bulk coffee. Would like to try out more with the other affiliate radio stations.	



Contact Status

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of Contacts: 21

Contact

Company	Tiny Town Productions	Address	2131 W. Tiny Rd.
Contact	Ashley Allan		Suite 200
Title	VP of Sales		Scottsdale, AZ 85028
Phone	(480) 555-2451	Ext.	United States
Mobile Phone	(480) 555-1111		
Salutation	Ashley	Country	
		E-mail	
		Web Site	

Status

ID/Status	Customer	Last Results	
Record Manager	Chris Huffman	Last Attempt	
Referred By		Last Reach	6/11/2005
Last edited by	Chris Huffman	Letter Date	
Edited On	6/27/2005	Last Meeting	
Created On	6/27/2005		

Contact

Company	Searchlight Casting	Address	1965 Golden Rd.
Contact	Gracie Anderson		Cumberland Mine
Title	Music and Lighting Coordinator		Tempe, AZ 85207
Phone	(480) 555-3764	Country	United States
Mobile Phone	(480) 555-4875	E-mail	GarciaAnderson@searchlightcasting.com
Salutation	Gracie	Web Site	www.searchlightcasting.com

Status

ID/Status	Friend	Last Results	
Record Manager	Chris Huffman	Last Attempt	
Referred By		Last Reach	
Last edited by	Chris Huffman	Letter Date	
Edited On	7/29/2005	Last Meeting	
Created On	6/27/2005		

Contact

Company	SimAero	Address	555 Bayale Dr.
Contact	Bruce Baker		Suite 2
Title	Chief Designer		Picacho, AZ 85111
Phone	(480) 555-2144	Country	United States
Mobile Phone	(602) 555-4444	E-mail	Bruce@simaero360.com
Salutation	Buzz	Web Site	www.simaero360.com

Status

ID/Status	Customer	Last Results	
Record Manager	Chris Huffman	Last Attempt	
Referred By	Advertisement	Last Reach	6/11/2005
Last edited by	Chris Huffman	Letter Date	
Edited On	6/27/2005	Last Meeting	
Created On	6/27/2005		



Source of Referrals

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Referred By

Advertisement

Total Referrals: 7

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
HAL's Consulting Corp	Lames Jawson	Man In Charge	(503) 555-2232
SimAero	Bruce Baker	Chief Designer	(480) 555-2144
Verge Records	Paul Henderson	Assistant Engineer	
Sewing Room;The	Danielle Middlebury	Owner	(415) 555-2242
Brushy's Golfing World	Paul Brushman	Chief Golf Sales Manager	(455) 555-2221
Goldfish Records	Annette Sharkey	New Media Manager	(555) 555-2145
Coffee Producers of Australia	Morgan Kennedy	Manager	07 999 1 1234

Referred By

Affiliate/Partner

Total Referrals: 1

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Brock, Lathers and Freedman	Dr. Deiter Brock	Plastic Surgeon	(879) 9 2-343

Referred By

Anthony Federici

Total Referrals: 3

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Hare's Tavern Phoenix	Steven Marsh		(07) 466 9 1100
Great Northern Coffee	Louis Hill	President	509-838-2711
Party Perfexion Inc.	Melanie Thompson	CEO	(732) 555-5627

Referred By

Called In

Total Referrals: 1

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Arcadia Ave. Florist	Jackie Jorgensen	Proprietor	01742 876234

Referred By

E-mail Campaign

Total Referrals: 4

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Circle Photography	Jonathan Jenkins	Owner	(214) 555-2215
Arcadia Ave. Florist	Jim Curtis	Manager	(602) 555-4412
Django Consulting	Michaela J. Zip	Vice President	
Hare's Tavern Corporate	Rae Stevens	CEO	(02) 861 2 3434

Referred By

Friend

Total Referrals: 1

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
MiniSoft	Anthony Federici	President	(212) 555-2355

Referred By

Kristi Cameron

Total Referrals: 1

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Freemont Corp	Dylan Nguyen	Marketing Director	(735) 554-012

Referred By

Search Engine

Total Referrals: 5

<u>Company</u>	<u>Contact</u>	<u>Title</u>	<u>Phone</u>
Spaghetteroni's	Mary Nara	The Italian Goddess of Sauce	(423) 555-2872
Verge Records	James Gutierrez	Administrative Assistant	



Group Membership

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Mike Underwood	T-Bone's Steakhouse	Owner	(541) 555-2422
Neilson Watts	Superior Technologies Ltd	Administrative Assistant	0164 222223
Bill Willis	Willis Enterprises	Owner	(480) 555-1232

Group Name Customers-AsiaPac

<u>Contact</u>	<u>Company</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Paul Brushman	Brushy's Golfing World	Chief Golf Sales Manager	(455) 555-2221		ginger@neyfamily.net
Ed Connor	Graham Electronics	Public Relations Manager	0198 356712		
Vivian Grace	International Safari	Buyer			
Chris Mears	Mutthound Enterprises	Vice President	01789 656556		
William Rosemann	Williams Consulting	Senior Technician	(03) 680 4		WRose@williamsconsulting5.com
Rae Stevens	Hare's Tavern Corporate	CEO	(02) 861 2		RaeStevens@harestavern.com

Group Name Customers-Chocolate

<u>Contact</u>	<u>Company</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Bruce Baker	SimAero	Chief Designer	(480) 555-2144		Bruce@simaero360.com
Liz Dittmeier	Brandee's Bakery	Manager	(208) 555-2445		
Liz Dittmeier	Dittmeier Delights	Manager	(208) 556-2349		
Kristi Elmendorf	Black Forest Baking	Manager	012-555-54		
Emma Francis	Prospect Boutique	Manager	(835) 555-632		
Jonathan Jenkins	Circle Photography	Owner	(214) 555-2215		JonathanJ@circlephoto6.com
Mackenzie Jensen	Brandee's Bakery	Owner	(208) 555-2211		
Colleen McCarthy	Ace Pet Store	Owner/Operator	(541) 555-3648		
Bella Minoal	Jake Flakes Inc.	Consultant			
Dylan Nguyen	Freemont Corp	Marketing Director	(735) 554-012		DNguyen@bechtel3.com
Sandy Ryan	Ace Pet Store	Buyer	(541) 555-9842		
Annette Sharkey	Goldfish Records	New Media Manager	(555) 555-2145		annette.sharkey@goldfishrecords.com
Melanie Thompson	Party Perfexion Inc.	CEO	(732) 555-5627		MelanieThomson@partyperfexion.net

Group Name Customers-Coffee Customers

<u>Contact</u>	<u>Company</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Silvia Carlini	Hospital de la Gente	Buyer	(932) 555-4845		
Bill Craig	KKQS Radio	Operations Manager	(480) 555-2146		
Liz Dittmeier	Dittmeier Delights	Manager	(208) 556-2349		
Liz Dittmeier	Brandee's Bakery	Manager	(208) 555-2445		
Mackenzie Jensen	Brandee's Bakery	Owner	(208) 555-2211		
Rudy Nordstrom	Jake Flakes Inc.	CEO	(480) 555-2211		
Alexander O'Brien	Manxsys Financial	Financial Advisor	(206) 555-4247		
Sandy Ryan	Ace Pet Store	Buyer	(541) 555-9842		

Group Name Customers-European

<u>Contact</u>	<u>Company</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Andy Bosson	Williams Consulting	Advanced Technician	0151 886265	4568	
Emma Francis	Prospect Boutique	Manager	(835) 555-632		
Scott Jacobsen	Moto Trips GmbH	Geschftsfhrer	(335) 5 0-25 2		
Gavin Maxwell	Macolm Hall Associates	Administrative Assistant	0191 676565		
Kelsey Reay	S D Enterprises	Manager	0208 789232		
Annette Sharkey	Goldfish Records	New Media Manager	(555) 555-2145		annette.sharkey@goldfishrecords.com



Group Summary

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Group FL Chamber

Group Description

Activities Date Range: 8/1/2007 - 8/31/2007

<u>Type</u>	<u>Cleared</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>
Personal	False	8/1/2007	1:00 AM	15 minutes	Send birthday gift	Chris Huffman
Meeting	False	8/1/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Meeting	False	8/8/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Meeting	False	8/15/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Meeting	False	8/22/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Meeting	False	8/29/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman

Group FL NACIE Board Members

Group Description National Association of Coffee Importers/Exporters

Activities Date Range: 8/1/2007 - 8/31/2007

<u>Type</u>	<u>Cleared</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>
Meeting	False	8/1/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/3/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman
Personal	False	8/7/2007	7:00 PM	1 hour	Johnnie's soccer practice Central Manhattan Recreation Center	Chris Huffman
Meeting	False	8/8/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/10/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman



Group Comprehensive

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Group	FL NACIE Board Members		
Group Description	National Association of Coffee Importers/Exporters	Address 1	
Private	False		
Sub-Groups?	False		
Record Creator	Chris Huffman		
Record Manager	Chris Huffman	Country	
Created On	6/26/2005	Edited On	Wednesday, 15 August 2007 13:38
Last edited by	Chris Huffman		

Contacts				
<u>Contact</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
William Cadbury	Founder	01214514444		
Milton Hershey	Chief Taster	713-534-4900		
Louis Hill	President	509-838-2711		jameshill@greatnorthern.com
Chris Huffman	CEO	(212) 555-1758		Chris@chgourmetgifts.com
Morgan Kennedy	Manager	07 999 1 1234		MK@coffeepa.au

Activities						
<u>Type</u>	<u>Cleared</u>	<u>Date</u>	<u>Time</u>	<u>Duration</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>
Meeting	False	8/1/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/3/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman
Personal	False	8/7/2007	7:00 PM	1 hour	Johnnie's soccer practice Central Manhattan Recreation Center	Chris Huffman
Meeting	False	8/8/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/10/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman
To-do	False	8/14/2007	1:00 AM	5 days	Industry trade show	Chris Huffman
Personal	False	8/14/2007	7:00 PM	1 hour	Johnnie's soccer practice Central Manhattan Recreation Center	Chris Huffman
Meeting	False	8/15/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/17/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman
Personal	False	8/21/2007	7:00 PM	1 hour	Johnnie's soccer practice Central Manhattan Recreation Center	Chris Huffman
Meeting	False	8/22/2007	10:00 AM	1 hour	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman
Personal	False	8/24/2007	8:00 PM	1 hour	Johnnie's Soccer Game Field #7	Chris Huffman
To-do	False	8/27/2007	10:00 AM	2 hours	Write Article for E-newsletter	Chris Huffman



Group List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of Groups: 19

<u>Group Name</u>	<u>Description</u>
Customers	ID/Status=Customer
Customers-AsiaPac	AsiaPac Customers
Customers-Chocolate	ID/Status=Customer;Opportunity=Chocolate
Customers-Coffee Customers	ID/Status=Customer;Opportunity=Coffee
Customers-European	European Customers
Customers-USA	USA Customers
Key Contacts	
Employees	All CH Gourmet Employees
International Employees	Non-USA CH Gourmet Employees
AsiaPac Employees	CH Gourmet AsiaPac Employees
European Employees	CH Gourmet European Employees
USA Employees	CH Gourmet USA Employees
FL Chamber	
FL NACIE Board Members	National Association of Coffee Importers/Exporters
Prospects	ID/Status=Prospect
Hot Opportunities	Opportunities Closing in 90 days
Prospects AsiaPAC	ID/Status=Prospect; Country=Australia
Prospects Europe	ID/Status=Prospect; Country=United Kingdom
Prospects USA	ID/Status=Prospect; Country=United States



Company Membership

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Company		CH Gourmet Gifts			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Ernst Anderson	Vice President of US	Sales	(415) 555-2231		Ernst@chgourmetgifts.com
Betty Browser	Sales Representative	Sales	0366462200		bbrowser@chgourmet.com
Fred Fenderline	Sales Representative	Sales	0208 746534		ffenderline@chgourmetgifts.com
Chris Huffman	CEO	Administration	(212) 555-1758		Chris@chgourmetgifts.com
Allison Mikola	Sales Representative	Sales	(212) 555-8421		Allison@chgourmetgifts.com
Melissa Pearce	Assistant	Corporate	(212) 555-8431		Melissa@chgourmetgifts.com
Juliette Rosseux	CFO	Corporate	(212) 555-7321		Juliette@chgourmetgifts.com
Jonathan Sommer	Vice President AsiaPac	Sales	03 664 62200		Jonathan@chgourmetgifts.com
Sarah Whiting	Vice President European	Sales	642 2222343		Sarah@chgourmetgifts.com

Company		CH Gourmet Gifts -			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Melissa Pearce	Assistant	Corporate	(212) 555-8431		Melissa@chgourmetgifts.com
Juliette Rosseux	CFO	Corporate	(212) 555-7321		Juliette@chgourmetgifts.com

Company		CH Gourmet Gifts - Sales			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Ernst Anderson	Vice President of US	Sales	(415) 555-2231		Ernst@chgourmetgifts.com
Betty Browser	Sales Representative	Sales	0366462200		bbrowser@chgourmet.com
Fred Fenderline	Sales Representative	Sales	0208 746534		ffenderline@chgourmetgifts.com
Allison Mikola	Sales Representative	Sales	(212) 555-8421		Allison@chgourmetgifts.com
Jonathan Sommer	Vice President AsiaPac	Sales	03 664 62200		Jonathan@chgourmetgifts.com
Sarah Whiting	Vice President European	Sales	642 2222343		Sarah@chgourmetgifts.com

Company		CH Gourmet Imports			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Jane Chan	Business Development	Corporate	(212) 555-4447		Jane@chgourmetgifts.com

Company		Circle Photography			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Sean Duffy	Sales Representative		0164 262546		
Jonathan Jenkins	Owner		(214) 555-2215		JonathanJ@circlephoto6.com

Company		Coffee Producers of Australia			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Morgan Kennedy	Manager	Purchasing	07 999 1 1234		MK@coffeepa.au

Company		Freemont Corp			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Dylan Nguyen	Marketing Director	Sale and Marketing	(735) 554-012		DNguyen@bechtel3.com

Company		Hare's Tavern Corporate			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Rae Stevens	CEO	Corporate	(02) 861 2 3434		RaeStevens@harestavern.com

Company		Hare's Tavern Phoenix			
<u>Contact</u>	<u>Title</u>	<u>Department</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Steven Marsh		Finance/Accounting	(07) 466 9 1100		StevenM@harestavernaz.com



Company Summary

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Company

Ace Pet Store

Phone	(423) 555-1221	Ext.	Address	925 Cabby St.
Toll-free Phone	(800) 555-2453	Ext.		P.O. Box 123
Fax Phone	(423) 555-7412	Ext.		
Website	www.acepet7.com			Eugene, OR 97401
			Country	United States

Notes

Date Range: All Dates

<u>Date</u>	<u>Time</u>	<u>Regarding</u>	<u>Record Manager</u>	<u>Contact</u>
2/2/2005	11:10 AM	First visit to CH Gourmet Gifts website	Melissa Pearce	Colleen McCarthy
2/2/2005	11:15 AM	Signed up for e-mail newsletter	Melissa Pearce	Colleen McCarthy
4/11/2005	7:00 PM	Went to Colleen's store location. She has a great display that other retailers should look at.	Chris Huffman	Colleen McCarthy

History

Date Range: All Dates

<u>Result</u>	<u>Date</u>	<u>Time</u>	<u>Regarding & Details</u>	<u>Record Manager</u>	<u>Contact</u>
Call Completed	2/2/2005	5:11 PM	Initial Communication Colleen is interested in our gift basket, chocolates and other items for a retail Point of Purchase display.	Melissa Pearce	Colleen McCarthy
To-do Done	2/6/2005	11:00 AM	Responded to e-mail	Melissa Pearce	Colleen McCarthy
Meeting Held	2/13/2005	4:02 PM	Follow-Up on Presentation <u>The results of the presentation were favorable!</u>	Allison Mikola	Colleen McCarthy
New Opportunity	3/2/2005	11:58 AM	Point of Purchase Display - ACT! Sales Cycle: Initial Communication 10%	Allison Mikola	Colleen McCarthy
Opportunity Stage Update	3/2/2005	12:03 PM	Point of Purchase Display - ACT! Sales Cycle: Needs Assessment 25%	Allison Mikola	Colleen McCarthy
Opportunity Stage Update	3/2/2005	12:05 PM	Point of Purchase Display - ACT! Sales Cycle: Presentation 40%	Allison Mikola	Colleen McCarthy
To-do Done	3/13/2005	12:00 PM	Check Delivery Status	Ernst Anderson	Colleen McCarthy
Opportunity Stage Update	4/1/2005	12:44 PM	Point of Purchase Display - ACT! Sales Cycle: Commitment to Buy 80%	Chris Huffman	
Opportunity Stage Update	4/1/2005	12:44 PM	Point of Purchase Display - ACT! Sales Cycle: Commitment to Buy 80%	Allison Mikola	Colleen McCarthy
Field Changed	4/1/2005	12:44 PM	Point of Purchase Display - Old Estimated Close Date: Friday, March 26, 2004 New Estimated Close Date: Friday, May 07, 2004	Allison Mikola	Colleen McCarthy
Field Changed	4/1/2005	12:44 PM	Point of Purchase Display - Old Estimated Close Date: Friday, March 26, 2004 New Estimated Close Date: Friday, May 07, 2004	Chris Huffman	
New Opportunity	4/1/2005	12:45 PM	Christmas Promotion - ACT! Sales Cycle Initial Communication 0% Thursday, April 01, 2004 9:45:28 AM	Allison Mikola	Sandy Ryan
New Opportunity	4/1/2005	12:45 PM	Christmas Promotion - ACT! Sales Cycle Initial Communication 0% Thursday, April 01, 2004 9:45:28 AM	Chris Huffman	
Opportunity Stage Update	4/1/2005	12:46 PM	Christmas Promotion - ACT! Sales Cycle: Negotiation 65%	Chris Huffman	



Company Summary

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Opportunity Stage Update	4/1/2005	12:46 PM	Christmas Promotion - ACT! Sales Cycle: Negotiation 65%	Allison Mikola	Sandy Ryan
Opportunity Stage Update	4/1/2005	1:29 PM	New Opportunity - ACT! Sales Cycle: Commitment to Buy 80%	Chris Huffman	
Opportunity Stage Update	4/1/2005	1:29 PM	New Opportunity - ACT! Sales Cycle: Commitment to Buy 80%	Allison Mikola	Colleen McCarthy
Opportunity Won	5/10/2005	3:09 PM	Point of Purchase Display Closed - Won Saturday, May 07, 2005 5:00:00 AM Colleen wants to create a Point of Purchase display featuring CH Gourmet Gifts chocolate and gift baskets. This is for human consumption only.	Ernst Anderson	Colleen McCarthy
Field Changed	6/13/2005	7:12 PM	Field Id/Status changed from to Retailer	Chris Huffman	
Field Changed	6/13/2005	7:17 PM	Field Id/Status changed from Retailer to Customer	Chris Huffman	
Opportunity Won	6/27/2005	3:33 PM	Christmas Promotion Closed - Won	Chris Huffman	Sandy Ryan
New Opportunity	6/27/2005	4:03 PM	New Opportunity - Sales Cycle Initial Communication 10%	Allison Mikola	Sandy Ryan

Activities

Date Range: All Dates

Type	Date	Time	Priority	Scheduled With	Regarding & Details	Scheduled For
Meeting	10/17/2003	5:02 PM	High	<Multiple Contacts>	Follow-Up on Presentation	Chris Huffman
Meeting	10/5/2005	4:30 PM	Low	Sandy Ryan	Demonstration	Chris Huffman
Call	10/31/2005	5:00 PM	Low	Sandy Ryan	Initial Communication	Chris Huffman
Call	4/12/2006	12:00 PM	Low	Colleen McCarthy	Follow up on the Point of Purchase Display opportunity, Presentation stage	Chris Huffman
Call	6/19/2006	4:00 PM	Low	Sandy Ryan	Follow up on the Christmas Promotion opportunity, Initial Communication stage	Chris Huffman

Opportunities

Date Range: All Dates

Status	Name	Est. Close	Stage	Prob.	Total	Record Manager	Contact
Open	New Opportunity	7/29/2005	Initial Communication	10%	\$1,062.50	Allison Mikola	Sandy Ryan
Closed - Won	Point of Purchase Display	5/7/2006	Commitment to Buy	100%	\$1,209.38	Ernst Anderson	Colleen McCarthy
Closed - Won	Christmas Promotion	6/19/2005	Negotiation	100%	\$942.00	Chris Huffman	Sandy Ryan



Company Comprehensive

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

Company

Ace Pet Store

Industry	Communication	Address	925 Cabby St.
# of Employees	20		P.O. Box 123
Region	North		
Division	Marketing		Eugene, OR 97401
Phone	(423) 555-1221	Country	United States
Toll-free Phone	(800) 555-2453	Record Creator	Chris Huffman
Fax Phone	(423) 555-7412	Record Manager	Chris Huffman
Website	www.acepet7.com	Created On	8/11/2003
		Edited On	8/15/2007

Contacts

<u>Contact</u>	<u>Title</u>	<u>Phone</u>	<u>Ext.</u>	<u>E-mail</u>
Colleen McCarthy	Owner/Operator	(541) 555-3648		
Sandy Ryan	Buyer	(541) 555-9842		

History

Date Range: All Dates

<u>Result</u>	<u>Date</u>	<u>Time</u>	<u>Regarding & Details</u>	<u>Record Manager</u>	<u>Contact</u>
Call Completed	2/2/2005	5:11 PM	Initial Communication Colleen is interested in our gift basket, chocolates and other items for a retail Point of Purchase display.	Melissa Pearce	Colleen McCarthy
To-do Done	2/6/2005	11:00 AM	Responded to e-mail	Melissa Pearce	Colleen McCarthy
Meeting Held	2/13/2005	4:02 PM	Follow-Up on Presentation <u>The results of the presentation were favorable!</u>	Allison Mikola	Colleen McCarthy
New Opportunity	3/2/2005	11:58 AM	Point of Purchase Display - ACT! Sales Cycle: Initial Communication 10%	Allison Mikola	Colleen McCarthy
Opportunity Stage Update	3/2/2005	12:03 PM	Point of Purchase Display - ACT! Sales Cycle: Needs Assessment 25%	Allison Mikola	Colleen McCarthy
Opportunity Stage Update	3/2/2005	12:05 PM	Point of Purchase Display - ACT! Sales Cycle: Presentation 40%	Allison Mikola	Colleen McCarthy
To-do Done	3/13/2005	12:00 PM	Check Delivery Status	Ernst Anderson	Colleen McCarthy
Opportunity Stage Update	4/1/2005	12:44 PM	Point of Purchase Display - ACT! Sales Cycle: Commitment to Buy 80%	Chris Huffman	
Opportunity Stage Update	4/1/2005	12:44 PM	Point of Purchase Display - ACT! Sales Cycle: Commitment to Buy 80%	Allison Mikola	Colleen McCarthy
Field Changed	4/1/2005	12:44 PM	Point of Purchase Display - Old Estimated Close Date: Friday, March 26, 2004 New Estimated Close Date: Friday, May 07, 2004	Allison Mikola	Colleen McCarthy
Field Changed	4/1/2005	12:44 PM	Point of Purchase Display - Old Estimated Close Date: Friday, March 26, 2004 New Estimated Close Date: Friday, May 07, 2004	Chris Huffman	
New Opportunity	4/1/2005	12:45 PM	Christmas Promotion - ACT! Sales Cycle Initial Communication 0% Thursday, April 01, 2004 9:45:28 AM	Allison Mikola	Sandy Ryan
New Opportunity	4/1/2005	12:45 PM	Christmas Promotion - ACT! Sales Cycle Initial Communication 0% Thursday, April 01, 2004 9:45:28 AM	Chris Huffman	
Opportunity Stage Update	4/1/2005	12:46 PM	Christmas Promotion - ACT! Sales Cycle: Negotiation 65%	Chris Huffman	



Company Comprehensive

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

Opportunity Stage Update	4/1/2005	12:46 PM	Christmas Promotion - ACT! Sales Cycle: Negotiation 65%	Allison Mikola	Sandy Ryan
Opportunity Stage Update	4/1/2005	1:29 PM	New Opportunity - ACT! Sales Cycle: Commitment to Buy 80%	Chris Huffman	
Opportunity Stage Update	4/1/2005	1:29 PM	New Opportunity - ACT! Sales Cycle: Commitment to Buy 80%	Allison Mikola	Colleen McCarthy
Opportunity Won	5/10/2005	3:09 PM	Point of Purchase Display Closed - Won Saturday, May 07, 2005 5:00:00 AM Colleen wants to create a Point of Purchase display featuring CH Gourmet Gifts chocolate and gift baskets. This is for human consumption only.	Ernst Anderson	Colleen McCarthy
Field Changed	6/13/2005	7:12 PM	Field Id/Status changed from to Retailer	Chris Huffman	
Field Changed	6/13/2005	7:17 PM	Field Id/Status changed from Retailer to Customer	Chris Huffman	
Opportunity Won	6/27/2005	3:33 PM	Christmas Promotion Closed - Won	Chris Huffman	Sandy Ryan
New Opportunity	6/27/2005	4:03 PM	New Opportunity - Sales Cycle Initial Communication 10%	Allison Mikola	Sandy Ryan

Opportunities

Date Range: All Dates

<u>Status</u>	<u>Name</u>	<u>Est. Close</u>	<u>Stage</u>	<u>Prob.</u>	<u>Total</u>	<u>Record Manager</u>	<u>Contact</u>
Open	New Opportunity	7/29/2005	Initial Communication	10%	\$1,062.50	Allison Mikola	Sandy Ryan
Closed - Won	Point of Purchase Display	5/7/2006	Commitment to Buy	100%	\$1,209.38	Ernst Anderson	Colleen McCarthy
Closed - Won	Christmas Promotion	6/19/2005	Negotiation	100%	\$942.00	Chris Huffman	Sandy Ryan



Company List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.
New York, NY 10008

Number of Companies: 41

<u>Company Name</u>	<u>Phone</u>	<u>Ext.</u>	<u>Toll-Free</u>	<u>Ext.</u>	<u>Web Site</u>
Ace Pet Store	(423) 555-1221		(800) 555-2453		www.acepet7.com
American Dreams	(972) 555-6225				www.americandreams12.com
Arcadia Ave. Florist	(602) 555-4412		(800) 555-2145		www.arcadiaaveflorist.com
Best Lender Financing	(847) 555-1232				www.bestlenderfin.com
Black Forest Baking	(211) 554-5641				www.blackforest3.com
Boomer's Artworx	(602) 555-4221				www.boomersartworx1.com
Brandee's Bakery	(480) 555-2146				www.brandeebakery.com
Brushy's Golfing World					www.brushygolf.com.au
CH Holding					
CH Gourmet Coffee					
CH Gourmet Gifts	(212) 555-2485		(800) 555-2157		www.chgourmetgifts.com
CH Gourmet Gifts -	(212) 555-2485		(800) 555-2157		www.chgourmetgifts.com
CH Gourmet Gifts - Sales	(212) 555-2485		(800) 555-2157		www.chgourmetgifts.com
CH Gourmet Imports					
Circle Photography	(214) 555-4652				www.circlephoto6.com
Coffee Producers of Australia					www.coffeepa.au
Freemont Corp	(735) 542-1423				www.freemontcorp.com
Hare's Tavern Corporate	(425) 555-3052		(800) 555-2145		www.harestavern.com
Hare's Tavern Phoenix					www.harestavernaz.com
Interactive Gifts	(212) 555-4752		(800) 555-6413		www.interactive23.com
Mad House;The	(310) 555-2454		(888) 555-2122		www.1madhouse1.com
MegaGadgets Catalog Co.	(312) 555-6625				www.megagadgets3.com



Company Directory

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of Companies: 41

<u>Company Name</u>	<u>Address</u>	<u>Shipping Address</u>	<u>Phone</u>	<u>Ext.</u>	<u>Toll-Free</u>	<u>Ext.</u>
Ace Pet Store	925 Cabby St. P.O. Box 123 Eugene, OR 97401	123 Main Street Boca Raton, FL 33433	(423) 555-1221		(800) 555-2453	
American Dreams	1113 Grainey Suite A Allen, TX 75002		(972) 555-6225			
Arcadia Ave. Florist	7201 N. Arcadia Ave. Suite 100 Phoenix, AZ 85020		(602) 555-4412		(800) 555-2145	
Best Lender Financing	4500 Payment Way Currency, IL 60199		(847) 555-1232			
Black Forest Baking	Grafenburger Allee 15 München, 9865		(211) 554-5641			
Boomer's Artworx	8907 E. Rosebud Lane Suite 25 Scottsdale, AZ 85258		(602) 555-4221			
Brandee's Bakery	41169 Alec Lane Boise, ID 83705		(480) 555-2146			
Brushy's Golfing World	Level 36 989 York St. Sydney, NSW 2000					
CH Holding						
CH Gourmet Coffee						
CH Gourmet Gifts	13 East 54th St. New York, NY 10008		(212) 555-2485		(800) 555-2157	



Sales Analysis by Record Manager

Date Range: All Dates

Record Manager

Allison Mikola

Total Sales: \$31,099.13

Total Number of Opportunities: 15

Status: # %

Open 6 40.00

Closed/Won 8 53.00

Closed/Lost 0 0.00

Inactive 1 7.00

Closed/Won Analysis:

Avg. Sales Amount \$3,887.39

Avg. Discount 2.00%

Total Gross Margin \$17,548.22

Avg. Gross Margin \$2,193.53

Avg. # Products per Sale 175.38

Avg. Days Open 451.75

Record Manager

Betty Browser

Total Sales: \$0.00

Total Number of Opportunities: 5

Status: # %

Open 5 100.0

Closed/Won 0 0.00

Closed/Lost 0 0.00

Inactive 0 0.00

Closed/Won Analysis:

Avg. Sales Amount \$0.00

Avg. Discount 0%

Total Gross Margin \$0.00

Avg. Gross Margin \$0.00

Avg. # Products per Sale 0

Avg. Days Open 0

Record Manager

Chris Huffman

Total Sales: \$6,493.96

Total Number of Opportunities: 10

Status: # %

Open 0 0.00

Closed/Won 7 70.00

Closed/Lost 2 20.00

Inactive 1 10.00

Closed/Won Analysis:

Avg. Sales Amount \$927.71

Avg. Discount 7.00%

Total Gross Margin \$2,916.34

Avg. Gross Margin \$416.62

Avg. # Products per Sale 67.29

Avg. Days Open 176.71

Record Manager

Ernst Anderson



Opportunities by Status

Date Range: All Dates

Liz Dittmeier	Brandee's Bakery	Monthly Order 2	ACT! Sales Cycle Presentation	4/5/2006	100%	\$431.57	\$431.57	Allison Mikola
Bettie James	Boomer's Artworx	Customer gifts	ACT! Sales Cycle Initial Communication	4/20/2006	100%	\$509.65	\$509.65	Ernst Anderson
Lames Jawson	HAL's Consulting Corp	Catalog fulfillment	ACT! Sales Cycle Presentation	3/27/2006	100%	\$2,998.50	\$2,998.50	Chris Huffman
Bruce Baker	SimAero	Customer Appreciation	ACT! Sales Cycle Initial Communication	9/21/2005	100%	\$419.70	\$419.70	Allison Mikola
Chris Fierros	Interactive Gifts	New store opening	ACT! Sales Cycle Initial Communication	6/18/2006	100%	\$3,762.52	\$3,762.52	Ernst Anderson
Kristi Elmendorf	Black Forest Baking	Initial order - bakery	ACT! Sales Cycle Presentation	3/12/2005	100%	\$1,789.13	\$1,789.13	Chris Huffman
Kristi Elmendorf	Black Forest Baking	Re-order	ACT! Sales Cycle Initial Communication	8/25/2005	100%	\$342.08	\$342.08	Sarah Whiting

Status	Closed - Lost	Total for Status: \$2,451.67	Weighted Total for Status: \$0.00
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<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Theodore Barrett Jr	Verge Records	Gifts for Clients and Talent	ACT! Sales Cycle Initial Communication	1/4/2005	0%	\$0.00	\$233.47	Chris Huffman
Kristi Cameron	American Dreams	Order #2	ACT! Sales Cycle Initial Communication	7/15/2005	0%	\$0.00	\$1,499.00	Chris Huffman
Bill Craig	KKQS Radio	Coffee Service - Quarterly order 2	ACT! Sales Cycle Initial Communication	7/2/2005	0%	\$0.00	\$719.20	Sarah Whiting

Status	Inactive	Total for Status: \$2,592.06	Weighted Total for Status: \$327.03
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<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Thomas Andrews	Modern Electric Supply	Corporate Gifts	ACT! Sales Cycle Initial Communication	2/28/2005	10%	\$146.04	\$1,460.39	Ernst Anderson
Ashley Allan	Tiny Town Productions	Gifts for Advertisers, clients and talent	ACT! Sales Cycle Initial Communication	2/28/2005	10%	\$42.76	\$427.59	Allison Mikola
Paul Brushman	Brushy's Golfing World	Golf Tournament Prizes and decorations	ACT! Sales Cycle Needs Assessment	2/12/2005	25%	\$113.04	\$452.15	Chris Huffman
Anthony Federici	MiniSoft	Corporate gifts	ACT! Sales Cycle Initial Communication	8/8/2004	10%	\$25.19	\$251.93	Sarah Whiting



Opportunities Adjusted for Probability

Date Range: All Dates

Weighted Total: \$12,288.75

Status		Open		Total for Status: \$44,150.92	Weighted Total for Status: \$12,288.75			
Contact	Company	Name	Stage	Est. Close	Prob.	Weighted Total	Total	Record Manager
Ann Goodall	A1 Services of UK	New Opportunity	Presentation	7/18/2005	40%	\$360.00	\$900.00	Sarah Whiting
Emily Dunn	Boomer's Artworx	New Opportunity	Initial Communication	9/12/2005	10%	\$67.50	\$675.00	Allison Mikola
Dylan Nguyen	Freemont Corp	Tradeshaw promotion	Presentation	10/1/2005	40%	\$2,340.07	\$5,850.16	Allison Mikola
Julie Britton	Quality Motors	New Opportunity	Initial Communication	10/14/2005	10%	\$720.00	\$7,200.00	Sarah Whiting
Sandy Ryan	Ace Pet Store	New Opportunity	Initial Communication	7/29/2005	10%	\$106.25	\$1,062.50	Allison Mikola
Michaela J. Zip	Django Consulting	New Opportunity	Initial Communication	6/27/2005	10%	\$269.98	\$2,699.75	Betty Browser
Paul Brushman	Brushy's Golfing World	New Opportunity	Needs Assessment	9/9/2005	25%	\$787.50	\$3,150.00	Betty Browser
Chris Burn	County Tennis Supplies	New Opportunity	Initial Communication	9/9/2005	10%	\$219.00	\$2,190.00	Sarah Whiting
Annette Sharkey	Goldfish Records	New Opportunity	Negotiation	8/31/2005	65%	\$1,721.85	\$2,649.00	Sarah Whiting
Vivian Grace	International Safari	New Opportunity	Initial Communication	10/21/2005	10%	\$336.00	\$3,360.00	Betty Browser
Gavin Dillerstone	Arcadia Ave. Florist	New Opportunity	Initial Communication	8/19/2005	10%	\$112.50	\$1,125.00	Sarah Whiting
Scott Jacobsen	Moto Trips GmbH	New Opportunity	Negotiation	9/22/2005	65%	\$1,560.00	\$2,400.00	Sarah Whiting
Liz Dittmeier	Dittmeier Delights	New Opportunity	Initial Communication	9/30/2005	10%	\$82.60	\$825.98	Allison Mikola
Rudy Nordstrom	Jake Flakes Inc.	New Opportunity	Presentation	9/12/2005	40%	\$573.81	\$1,434.52	Allison Mikola
Morgan Kennedy	Coffee Producers of	New Opportunity	Initial Communication	8/22/2005	10%	\$262.50	\$2,625.00	Betty Browser
Ania Dawson	ABS Garages Ltd	New Opportunity	Needs Assessment	7/22/2005	25%	\$360.00	\$1,440.00	Betty Browser
Ivan A. Stekopick	Swing Software	New Opportunity	Commitment to Buy	9/1/2005	80%	\$1,599.20	\$1,999.00	Sarah Whiting
Jonathan Jenkins	Circle Photography	New Opportunity	Needs Assessment	7/27/2005	25%	\$360.00	\$1,440.00	Allison Mikola
Gareth Cram	Johnson Design & Build	New Opportunity	Presentation	8/15/2005	40%	\$450.00	\$1,125.00	Sarah Whiting



Pipeline Report

Date Range: 1/1/2006 - 12/31/2006

Stage		Commitment to Buy		Total for Stage: \$15,605.38	Weighted Total for Stage: \$15,605.38				
Contact	Company	Name	Process	Est. Close	Prob.	Weighted Total	Total	Record Manager	
Morty Manicotti	Corleone's Pasta Company	Store opening	ACT! Sales Cycle	4/18/2006	100%	\$14,396.00	\$14,396.00	Allison Mikola	
Colleen McCarthy	Ace Pet Store	Point of Purchase Display	ACT! Sales Cycle	5/7/2006	100%	\$1,209.38	\$1,209.38	Ernst Anderson	

Stage		Initial Communication		Total for Stage: \$20,721.81	Weighted Total for Stage: \$19,222.81				
Contact	Company	Name	Process	Est. Close	Prob.	Weighted Total	Total	Record Manager	
Alexander O'Brien	Manxsys Financial	Initial Order	ACT! Sales Cycle	6/23/2005	100%	\$3,418.60	\$3,418.60	Allison Mikola	
Bettie James	Boomer's Artworx	Customer gifts	ACT! Sales Cycle	4/20/2006	100%	\$509.65	\$509.65	Ernst Anderson	
Herman Getter	Continental Energy	Employee gifts	ACT! Sales Cycle	3/2/2006	100%	\$5,571.50	\$5,571.50	Allison Mikola	
Kristi Cameron	American Dreams	Order #2	ACT! Sales Cycle	7/15/2005	0%	\$0.00	\$1,499.00	Chris Huffman	
Emma Francis	Prospect Boutique	Initial order - retail shop	ACT! Sales Cycle	3/2/2006	100%	\$676.46	\$676.46	Sarah Whiting	
Bill Craig	KKQS Radio	Coffee Service - Quarterly order	ACT! Sales Cycle	3/2/2005	100%	\$809.10	\$809.10	Sarah Whiting	
Bill Craig	KKQS Radio	Coffee Service - Quarterly order 3	ACT! Sales Cycle	3/2/2005	100%	\$764.15	\$764.15	Allison Mikola	
Bruce Baker	SimAero	Customer Appreciation	ACT! Sales Cycle	9/21/2005	100%	\$419.70	\$419.70	Allison Mikola	
Chris Fierros	Interactive Gifts	New store opening	ACT! Sales Cycle	6/18/2006	100%	\$3,762.52	\$3,762.52	Ernst Anderson	
Kristi Elmendorf	Black Forest Baking	Re-order	ACT! Sales Cycle	8/25/2005	100%	\$342.08	\$342.08	Sarah Whiting	
Mackenzie Jensen	Brandee's Bakery	Initial order for bakery	ACT! Sales Cycle	1/12/2006	100%	\$2,301.70	\$2,301.70	Ernst Anderson	
Liz Dittmeier	Brandee's Bakery	Monthly Order 1	ACT! Sales Cycle	3/2/2005	100%	\$647.35	\$647.35	Chris Huffman	



Opportunities by Record Manager

Date Range: All Dates

Total for Date Range: \$44,150.92

Record Manager				Number of Opportunities: 6	Total for Record Manager: \$11,288.17	% of Total: 25.57%		
<u>Status</u>	<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Prob.</u>	<u>Est. Close</u>	<u>Weighted Total</u>	<u>Total</u>
Open	Sandy Ryan	Ace Pet Store	New Opportunity	ACT! Sales Cycle Initial Communication	10%	7/29/2005	\$106.25	\$1,062.50
Open	Emily Dunn	Boomer's Artworx	New Opportunity	ACT! Sales Cycle Initial Communication	10%	9/12/2005	\$67.50	\$675.00
Open	Dylan Nguyen	Freemont Corp	Tradeshow promotion	ACT! Sales Cycle Presentation	40%	10/1/2005	\$2,340.07	\$5,850.16
Open	Liz Dittmeier	Dittmeier Delights	New Opportunity	ACT! Sales Cycle Initial Communication	10%	9/30/2005	\$82.60	\$825.98
Open	Rudy Nordstrom	Jake Flakes Inc.	New Opportunity	ACT! Sales Cycle Presentation	40%	9/12/2005	\$573.81	\$1,434.52
Open	Jonathan Jenkins	Circle Photography	New Opportunity	ACT! Sales Cycle Needs Assessment	25%	7/27/2005	\$360.00	\$1,440.00
Record Manager		Betty Browser		Number of Opportunities: 5	Total for Record Manager: \$13,274.75	% of Total: 30.07%		
<u>Status</u>	<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Prob.</u>	<u>Est. Close</u>	<u>Weighted Total</u>	<u>Total</u>
Open	Morgan Kennedy	Coffee Producers of Australia	New Opportunity	ACT! Sales Cycle Initial Communication	10%	8/22/2005	\$262.50	\$2,625.00
Open	Ania Dawson	ABS Garages Ltd	New Opportunity	ACT! Sales Cycle Needs Assessment	25%	7/22/2005	\$360.00	\$1,440.00
Open	Vivian Grace	International Safari	New Opportunity	ACT! Sales Cycle Initial Communication	10%	10/21/2005	\$336.00	\$3,360.00
Open	Michaela J. Zip	Django Consulting	New Opportunity	ACT! Sales Cycle Initial Communication	10%	6/27/2005	\$269.98	\$2,699.75
Open	Paul Brushman	Brushy's Golfing World	New Opportunity	ACT! Sales Cycle Needs Assessment	25%	9/9/2005	\$787.50	\$3,150.00
Record Manager		Sarah Whiting		Number of Opportunities: 8	Total for Record Manager: \$19,588.00	% of Total: 44.37%		
<u>Status</u>	<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Prob.</u>	<u>Est. Close</u>	<u>Weighted Total</u>	<u>Total</u>
Open	Chris Burn	County Tennis Supplies	New Opportunity	ACT! Sales Cycle Initial Communication	10%	9/9/2005	\$219.00	\$2,190.00



Opportunities by Contact

Date Range: All Dates

Number of Opportunities: 48

Total for Date Range: \$1,434.52

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
New Opportunity	Open	ACT! Sales Cycle	9/12/2005	866	40%	\$573.81	\$1,434.52	Allison Mikola

<u>Contact</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Gareth Cram	Open	Johnson Design & Build Partners	9/12/2005	866	40%	\$573.81	\$1,434.52	Allison Mikola

Phone: 0987 678234 Ext. E-mail

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
New Opportunity	Open	ACT! Sales Cycle	8/15/2005	779	40%	\$450.00	\$1,125.00	Sarah Whiting

<u>Contact</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Bill Craig	Open	KKQS Radio	8/15/2005	779	40%	\$450.00	\$1,125.00	Sarah Whiting

Phone: (480) 555-2146 Ext. E-mail

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Coffee Service - Quarterly order	Closed - Won	ACT! Sales Cycle	3/2/2005	369	100%	\$809.10	\$809.10	Sarah Whiting

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Coffee Service - Quarterly order 2	Closed - Lost	ACT! Sales Cycle	7/2/2005	70	0%	\$0.00	\$719.20	Sarah Whiting

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Coffee Service - Quarterly order 3	Closed - Won	ACT! Sales Cycle	3/2/2005	482	100%	\$764.15	\$764.15	Allison Mikola

<u>Contact</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Alexander O'Brien	Closed - Won	Manxsys Financial	3/2/2005	482	100%	\$764.15	\$764.15	Allison Mikola

Phone: (206) 555-4247 Ext. E-mail

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Initial Order	Closed - Won	ACT! Sales Cycle	6/23/2005	452	100%	\$3,418.60	\$3,418.60	Allison Mikola

<u>Contact</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
Anthony Federici	Closed - Won	MiniSoft	6/23/2005	452	100%	\$3,418.60	\$3,418.60	Allison Mikola

Phone: (212) 555-2355 Ext. E-mail AnthonyF@tonyfed.com

<u>Opportunity Name</u>	<u>Status</u>	<u>Process/Stage</u>	<u>Est. Close</u>	<u>Days Open</u>	<u>Prob.</u>	<u>Weighted Total</u>	<u>Total</u>	<u>Record Manager</u>
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Gross Margin by Record Manager

Date Range: All Dates

Total Sales: \$47,203.98

Record Manager	Allison Mikola				
<u>Total Sales</u>	<u>Total Cost</u>	<u>Avg. Discount</u>	<u>Total Gross Margin</u>	<u>Gross Margin as % of Sales</u>	
\$31,099.13	\$13,550.91	1.94%	\$17,548.22	56.43%	
Record Manager	Chris Huffman				
<u>Total Sales</u>	<u>Total Cost</u>	<u>Avg. Discount</u>	<u>Total Gross Margin</u>	<u>Gross Margin as % of Sales</u>	
\$15,239.83	\$8,800.34	7.13%	\$6,439.49	42.25%	
Record Manager	Ernst Anderson				
<u>Total Sales</u>	<u>Total Cost</u>	<u>Avg. Discount</u>	<u>Total Gross Margin</u>	<u>Gross Margin as % of Sales</u>	
\$21,747.79	\$11,790.48	5.88%	\$9,957.31	45.79%	
Record Manager	Sarah Whiting				
<u>Total Sales</u>	<u>Total Cost</u>	<u>Avg. Discount</u>	<u>Total Gross Margin</u>	<u>Gross Margin as % of Sales</u>	
\$3,864.72	\$1,954.41	9.29%	\$1,910.31	49.43%	



Lost Opportunities by Reason

Date Range: All Dates

Total for Date Range: \$2,451.67

Reason		Number by Reason: 1	Total Lost by Reason: \$1,499.00	% of Total: 61.14%			
Contact	Company	Name	Process/Stage	Close Date	Days Open	Total	Record Manager
Kristi Cameron	American Dreams	Order #2	ACT! Sales Cycle Initial Communication	6/27/2006	452	\$1,499.00	Chris Huffman
Reason		Number by Reason: 1	Total Lost by Reason: \$719.20	% of Total: 29.34%			
Contact	Company	Name	Process/Stage	Close Date	Days Open	Total	Record Manager
Bill Craig	KKQS Radio	Coffee Service - Quarterly order 2	ACT! Sales Cycle Initial Communication	8/12/2005	70	\$719.20	Sarah Whiting
Reason		Number by Reason: 1	Total Lost by Reason: \$233.47	% of Total: 9.52%			
Contact	Company	Name	Process/Stage	Close Date	Days Open	Total	Record Manager
Theodore Barrett Jr	Verge Records	Gifts for Clients and Talent	ACT! Sales Cycle Initial Communication	4/8/2005	-1	\$233.47	Chris Huffman



Lost Opportunities by Record Manager

Date Range: All Dates

Total Lost for Date Range: \$2,451.67

Record Manager				Number of Lost Opps.:	Total Lost for Record Manager:	% of Total Lost:
<u>Status</u>	<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Process/Stage</u>	<u>Close Date</u>	<u>Total Reason</u>
Chris Huffman				2	\$1,732.47	70.66%
Closed - Lost	Theodore Barrett Jr	Verge Records	Gifts for Clients and Talent	ACT! Sales Cycle Initial Communication	1/4/2005	\$233.47 Price
Closed - Lost	Kristi Cameron	American Dreams	Order #2	ACT! Sales Cycle Initial Communication	7/15/2005	\$1,499.00
Sarah Whiting				1	\$719.20	29.34%
Closed - Lost	Bill Craig	KKQS Radio	Coffee Service - Quarterly order 2	ACT! Sales Cycle Initial Communication	7/2/2005	\$719.20 Discontinued this particular special



Birthday List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of contacts: 47

Contact	Company	Birthday
George Agen	Williams Consulting	6/24/1959
Ashley Allan	Tiny Town Productions	5/30/2002
Ernst Anderson	CH Gourmet Gifts	2/22/1964
Gracie Anderson	Searchlight Casting	1/4/1968
Bruce Baker	SimAero	6/18/2004
Albert Barry	Mercury Production Management	9/12/1972
Betty Browser	CH Gourmet Gifts	11/16/1962
Dr. Deiter Brock	Brock, Lathers and Freedman	10/23/1962
Paul Brushman	Brushy's Golfing World	8/12/1968
Cecil Carter	CH Gourmet Coffee	6/23/1964
Jane Chan	CH Gourmet Imports	2/19/1963
Bill Craig	KKQS Radio	10/9/1978
Jim Curtis	Arcadia Ave. Florist	8/23/1979
Brian David	Mix Alliance	12/15/2000
Liz Dittmeier	Brandee's Bakery	6/11/1962
Emily Dunn	Boomer's Artworx	3/11/1959
Kristi Elmendorf	Black Forest Baking	11/22/1973
Anthony Federici	MiniSoft	5/25/2003
Fred Fenderline	CH Gourmet Gifts	10/30/1963
Hayleigh Frieda	American Dreams	5/23/1979
Herman Getter	Continental Energy	4/19/1975
Max Headlong	Widget Corporation	10/9/1978
Milton Hershey	Hershey Chocolate Company	7/12/2004
Todd Hornsby	Harbor Lights Restaurant	3/15/1970
Bettie James	Boomer's Artworx	4/20/1961
Jonathan Jenkins	Circle Photography	10/12/1963
Mackenzie Jensen	Brandee's Bakery	7/5/1961
Morgan Kennedy	Coffee Producers of Australia	5/20/2000
Benny Lender	Best Lender Financing	9/5/1963
Wilhelm Loke	UZI International	11/25/2004
Morty Manicotti	Corleone's Pasta Company	3/17/1967
Colleen McCarthy	Ace Pet Store	7/5/2004
Drew McLintock	Verge Records	11/15/1952
Danielle Middlebury	Sewing Room;The	12/19/2004
Allison Mikola	CH Gourmet Gifts	1/13/1968
Dylan Nguyen	Freemont Corp	8/30/2003
Alexander O'Brien	Manxsys Financial	1/7/2003
Melissa Pearce	CH Gourmet Gifts	1/15/1965
William Rosemann	Williams Consulting	1/21/1982
Juliette Rosseux	CH Gourmet Gifts	1/16/1960
Annette Sharkey	Goldfish Records	12/5/2004
Brandon Sloan	Sierra's Cafe	1/7/1968
Jonathan Sommer	CH Gourmet Gifts	2/5/1973
Rae Stevens	Hare's Tavern Corporate	5/15/2000
Mike Underwood	T-Bone's Steakhouse	4/21/1959
Sarah Whiting	CH Gourmet Gifts	3/17/1980
Bill Willis	Willis Enterprises	7/15/2000



E-mail List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of Contacts: 41

<u>Company</u>	<u>Contact</u>	<u>E-mail</u>	<u>Personal E-mail</u>
CH Gourmet Gifts	Ernst Anderson	Ernst@chgourmetgifts.com	
Searchlight Casting	Gracie Anderson	GarciaAnderson@searchlightcasting.com	
SimAero	Bruce Baker	Bruce@simaero360.com	
Verge Records	Theodore Barrett Jr	Theo@vergerecords.com	
CH Gourmet Gifts	Betty Browser	bbrowser@chgourmet.com	
Brock, Lathers and Freedman	Dr. Deiter Brock	dbrock@cpqt.co.ck	
Brushy's Golfing World	Paul Brushman	ginger@neyfamily.net	
CH Gourmet Coffee	Cecil Carter	Cecil@chgourmetgifts.com	
CH Gourmet Imports	Jane Chan	Jane@chgourmetgifts.com	
Mix Alliance	Brian David	BrianDavid@mixalliance.com	
MiniSoft	Anthony Federici	AnthonyF@tonyfed.com	
CH Gourmet Gifts	Fred Fenderline	ffenderline@chgourmetgifts.com	
Verge Records	James Gutierrez	JamesGutierrez@vergerecords.com	
Verge Records	Paul Henderson	PaulH@vergerecords.com	
Great Northern Coffee	James Hill	jameshill@greatnorthern.com	
Great Northern Coffee	Louis Hill	jameshill@greatnorthern.com	
HAL's Consulting Corp	Lames Jawson	LamesJawson@jawson.org.com	
Circle Photography	Jonathan Jenkins	JonathanJ@circlephoto6.com	
Arcadia Ave. Florist	Jackie Jorgensen	JJ@arcadiaaveflorist.com	
Coffee Producers of Australia	Morgan Kennedy	MK@coffeepa.au	
UZI International	Wilhelm Loke	WhilhelmL@uziscripts.com	
Hare's Tavern Phoenix	Steven Marsh	StevenM@harestavernaz.com	
Verge Records	Drew McLintock	DMclintock@vergerecords.com	
Sewing Room;The	Danielle Middlebury	DanielleM@thesewingroom14.com	
CH Gourmet Gifts	Allison Mikola	Allison@chgourmetgifts.com	
Great Northern Coffee	Tommy Morgan	tommymorgan@greatnorthern.com	
Spaghettoni's	Mary Nara	MaryNara@spaghettoni.com	
Freemont Corp	Dylan Nguyen	DNguyen@bechtel3.com	
CH Gourmet Gifts	Melissa Pearce	Melissa@chgourmetgifts.com	
Captains of Industry	IM Powerful	im@captainsoi.com	
Williams Consulting	William Rosemann	WRose@williamsconsulting5.com	
CH Gourmet Gifts	Juliette Rosseux	Juliette@chgourmetgifts.com	
Goldfish Records	Annette Sharkey	annette.sharkey@goldfishrecords.com	
Sierra's Cafe	Brandon Sloan	BrandonSloan@sierrascafe.com	
CH Gourmet Gifts	Jonathan Sommer	Jonathan@chgourmetgifts.com	
Swing Software	Ivan A. Stekopick	IStekopick@swinsoft27.spb.ru	
Hare's Tavern Corporate	Rae Stevens	RaeStevens@harestavern.com	
Party Perfexion Inc.	Melanie Thompson	MelanieThomson@partyperfexion.net	
Great Northern Chocolates	Van Johnson	vanjohnson@greatnorthern.com	
CH Gourmet Gifts	Sarah Whiting	Sarah@chgourmetgifts.com	
Django Consulting	Michaela J. Zip	mzip@djangiconsulting8.com	



Fax List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Number of contacts: 101

<u>Company</u>	<u>Contact</u>	<u>Fax</u>	<u>Fax Ext</u>
A1 Services	Andy Harrison	0174 287623	
A1 Services of UK	Ann Goodall	0191 254590	
A1 Services of UK	Angela Ives	0174 287623	
ABS Garages Ltd	Ania Dawson	0174 287623	
Ace Pet Store	Colleen McCarthy	(541) 555-7854	
Ace Pet Store	Sandy Ryan	(541) 555-4881	
American Dreams	Kristi Cameron	(480) 555-2145	
American Dreams	Hayleigh Frieda	(972) 555-4212	
Arcadia Ave. Florist	Gavin Dillerstone	0191 234569	
Best Lender Financing	Benny Lender	(847) 555-1242	
Black Forest Baking	Kristi Elmendorf	(025) 4 5-55 6	
Boomers Artworx	Jane Bellamy	0198 167423	
Boomers Artworx	Richard Harvison	0191 268960	
Boomer's Artworx	Emily Dunn	(602) 555-8848	
Brandee's Bakery	Mackenzie Jensen	(208) 555-8488	
Brock, Lathers and Freedman	Dr. Deiter Brock	(330) 233-0909	
Brushy's Golfing World	Paul Brushman	(455) 555-8878	
Captains of Industry	IM Powerful	(713) 661-5096	
CH Gourmet Coffee	Cecil Carter	(212) 555-4544	
CH Gourmet Gifts	Ernst Anderson	(415) 555-2245	
CH Gourmet Gifts	Fred Fenderline	1642633454	
CH Gourmet Gifts	Allison Mikola	(212) 555-3578	
CH Gourmet Gifts	Melissa Pearce	(212) 555-4874	
CH Gourmet Gifts	Sarah Whiting	1642633454	
CH Gourmet Imports	Jane Chan	(212) 555-4784	
Circle Photography	Sean Duffy	0164 263345	
Circle Photography	Jonathan Jenkins	(214) 555-6151	
Continental Energy	Herman Getter	(918) 555-2333	
Corleone's Pasta Company	Morty Manicotti	(480) 555-5412	
County Tennis Supplies	Chris Burn	0191 385643	
Dr. Brian Bayne, M.D.	Dr. Brian Bayne, M.D.	0191 643434	
Dulac Electronique et Dcoupe Laser	Frdric Dulac	01 22 44 22 00	
E D Enterprises	Claire Haldane	0191 937983	
E H Studios	Craig Potts	0191 345679	
F G Landscape & Design	Ethan Turnbull	0132 761754	
FP Building Supplies	David Purkis	0160 335478	
Freemont Corp	Dylan Nguyen	(735) 554-421	
Goldfish Records	Annette Sharkey	(555) 555-2487	
Graham Electronics	Ed Connor	0198 323456	
Great Northern Coffee	James Hill	509-838-2700	
Great Northern Coffee	Louis Hill	509-838-2700	
Great Northern Coffee	Tommy Morgan	509-838-2700	



Task List

Chris Huffman, CH Gourmet Gifts
13 East 54th St.

New York, NY 10008

Date Range: 8/1/2007 - 8/31/2007

Contact		Ernst Anderson		CH Gourmet Gifts		(415) 555-2231	
<u>Type</u>	<u>Cleared Status</u>	<u>Date</u>	<u>Time</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	
Meeting	Open	8/7/2007	5:00 PM	Low	Weekly Operational Review	Chris Huffman	
Meeting	Open	8/14/2007	5:00 PM	Low	Weekly Operational Review	Chris Huffman	
Meeting	Open	8/21/2007	5:00 PM	Low	Weekly Operational Review	Chris Huffman	
Meeting	Open	8/28/2007	5:00 PM	Low	Weekly Operational Review	Chris Huffman	

Contact		Betty Browser		CH Gourmet Gifts		0366462200	
<u>Type</u>	<u>Cleared Status</u>	<u>Date</u>	<u>Time</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	
Meeting	Open	8/1/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/8/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/15/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/22/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/29/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	

Contact		Fred Fenderline		CH Gourmet Gifts		0208 746534	
<u>Type</u>	<u>Cleared Status</u>	<u>Date</u>	<u>Time</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	
Meeting	Open	8/1/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/8/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/15/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/22/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	
Meeting	Open	8/29/2007	10:00 AM	Low	Sales Pipeline Review Concurrence Call Use Company Conference Call Account to dial in: Password = 287650	Chris Huffman	

Contact		Allison Mikola		CH Gourmet Gifts		(212) 555-8421	
<u>Type</u>	<u>Cleared Status</u>	<u>Date</u>	<u>Time</u>	<u>Priority</u>	<u>Regarding & Details</u>	<u>Scheduled For</u>	

**NEW 2010 REPORTS
CREATED BY TECH BENDERS!**



Won Opportunities and Days Open

Date Range: All Dates

Total For Date Range: \$944,200.00

Process CHT1 Sales

Count For Process:

113

Total For Process:

\$930,200.00

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Est. Close</u>	<u>Actual Close</u>	<u>Close Delta</u>	<u>Days Open</u>	<u>Total</u>	<u>Record Manager</u>
Kelsey Reay	S D Enterprises	SD Enterprises-New Opportunity	5/20/2007	8/29/2008	8/29/2008	0	467	\$5,000.00	Chris Huffman
Bruce Baker	SimAero	SimAero-Picacho Offices	5/20/2007	6/30/2008	6/30/2008	0	407	\$5,000.00	Chris Huffman
Bruce Baker	SimAero	SimAero-Upgrade to TWO	5/20/2007	5/23/2008	5/23/2008	0	369	\$4,000.00	Chris Huffman
Gracie Anderson	Searchlight Casting	Searchlight Casting-Tempe	4/27/2009	7/14/2009	7/30/2009	16	94	\$12,000.00	Chris Huffman
Claire Haldane	E D Enterprises	ED Enterprises-Install ONE	5/19/2007	1/25/2008	1/25/2008	0	251	\$2,500.00	Ernst Anderson
Angela Ives	A1 Services of UK	A1 Services of UK-Portable Unit	5/15/2007	11/28/2008	4/13/2009	136	699	\$12,000.00	Chris Huffman
Louise Harper	Stevenson & Smith	Stevenson & SMITH-Office Upgrades	5/19/2009	1/17/2010	1/17/2010	0	243	\$5,000.00	Chris Huffman
Danielle Middlebury	Sewing Room;The	Sewing Room-New Facility	5/20/2007	5/30/2008	5/30/2008	0	376	\$24,000.00	Chris Huffman
Dan Minnick	Django Consulting	Django Consulting-Install TechONE	4/18/2008	12/30/2008	12/30/2008	0	256	\$12,000.00	Chris Huffman
Claire Haldane	E D Enterprises	ED Enterprises-New TechONE	1/4/2010	5/17/2010	5/17/2010	0	133	\$12,000.00	Ernst Anderson
Colleen McCarthy	Ace Pet Store Franchises	Ace Pet Store-TechONE	4/13/2008	4/15/2008	4/13/2008	-1	0	\$12,000.00	Chris Huffman
Vivian Grace	International Safari	International Safari-Upgrade to Warrabee	11/28/2009	4/17/2010	4/17/2010	0	140	\$12,000.00	Ernst Anderson
Ben Barrow	Making Technology Co	Making Technology-Testing ONEComponent	5/20/2007	7/25/2008	7/25/2008	0	432	\$2,500.00	Ernst Anderson
Richard Harvison	Boomers Artworx	Boomer's Artworx-TechONE	5/19/2009	11/14/2009	11/14/2009	0	179	\$7,500.00	Ernst Anderson
Anthony Keltie	Spin Recording Studios	New Opportunity	5/20/2007	3/31/2008	3/31/2008	0	316	\$24,000.00	Chris Huffman
Annette Sharkey	Goldfish Records	New Opportunity	5/20/2007	2/29/2008	2/29/2008	0	285	\$7,500.00	Ernst Anderson
Charlie Allnut	River Rat Tours	New Opportunity	5/20/2007	8/29/2008	8/29/2008	0	467	\$2,000.00	Chris Huffman
Andy Harrison	A1 Services	New Opportunity	5/20/2009	8/30/2009	8/30/2009	0	102	\$4,000.00	Ernst Anderson
Hayleigh Frieda	American Dreams	American Dreams-Upgrad Component	10/31/2009	10/30/2009	10/31/2009	1	0	\$2,500.00	Allison Mikola
Jonathan Jenkins	Circle Photography	Circle Photography-Plano Plant	4/30/2009	1/22/2010	1/22/2010	0	267	\$12,000.00	Allison Mikola
Jonathan Jenkins	Circle Photography	New Opportunity	5/19/2009	10/18/2009	10/18/2009	0	152	\$12,000.00	Allison Mikola



Won Opportunities by Actual Closing Month

Date Range: All Dates

Total For Date Range: \$944,200.00

Process CHT1 Service		Count For Process:	7		Total For Process:	\$14,000.00		
<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Reason:</u>	<u>Record Manager</u>
Bill Willis	Willis Enterprises	Willis Enterprises-SC	5/20/2007	2/29/2008	285	\$2,000.00		Chris Huffman
Gavin Maxwell	Macolm Hall Associates	Malcolm Hall-SC	5/20/2007	7/31/2008	438	\$2,000.00		Ernst Anderson
UR Powerful	Captains of Industry	COI-SC for Bellaire Offices	11/28/2008	11/28/2008	0	\$2,000.00	Local Representation	Chris Huffman
Andy Harrison	A1 Services	A1 Services-SC	5/20/2009	8/29/2009	101	\$2,000.00		Ernst Anderson
Liz Dittmeier	Brandee's Bakery	Brandee's Bakery-SC	10/30/2009	11/13/2009	14	\$2,000.00	ROI Offered by CH TechOne	Allison Mikola
Louis Renault	Beautiful Friendship Bar & Grill	Beautiful Friendship-SC	5/19/2009	12/13/2009	208	\$2,000.00		Ernst Anderson
UR Powerful	Captains of Industry	COI-SC	3/17/2010	7/29/2010	134	\$2,000.00	Current Client Relationship	Chris Huffman

Total By Month For CHT1 Service Process

January:	\$0.00
February:	\$2,000.00
March:	\$0.00
April:	\$0.00
May:	\$0.00
June:	\$0.00
July:	\$4,000.00
August:	\$2,000.00
September:	\$0.00
October:	\$0.00
November:	\$4,000.00
December:	\$2,000.00



Opportunities By Process And Status

Date Range: 9/1/2009 - 9/30/2009 **Total for Date Range:** \$205,500.00 **Weighted Total for Date Range:** \$92,075.00

Process CHT1 Sales **Total For Process:** \$195,500.00 **Weighted Total For Process:** \$88,575.00

Status Open **Total For Status:** \$120,500.00 **Weighted Total For Status:** \$27,575.00

<u>Company</u>	<u>Contact</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Quality Motors	Julie Britton	Quality Motore-Garage	9/30/2009	25%	\$625.00	\$2,500.00	Chris Huffman
Brandee's Bakery	Mackenzie Jensen	Brandee's Bakery-Bakery	9/27/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Boomer's Artworx	Emily Dunn	Boomer's Artworx-Scotts	9/18/2009	40%	\$4,800.00	\$12,000.00	Chris Huffman
ABS Garages Ltd	Ania Dawson	ABS Garages-NSW	9/27/2009	10%	\$250.00	\$2,500.00	Ernst Anderson
Boomer's Artworx	Bettie James...	Boomer's Artworx-Phoeni	9/25/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Superclean	Mike Campbell	Superclean-Trow House	9/11/2009	10%	\$1,200.00	\$12,000.00	Chris Huffman
Finch Legal Aid	Jean Louise Finch	Finch Legal Aid-Offices	9/28/2009	65%	\$7,800.00	\$12,000.00	Allison Mikola
Bick's Longhorns	Jordan Benedict	Bick's Longhorns-East Te	9/18/2009	10%	\$2,200.00	\$22,000.00	Chris Huffman
Duke Industries	Marion Morrison	Duke Industries-Santa M	9/25/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Duke Industries	John Chance	Duke Industries-Santa M	9/20/2009	40%	\$1,600.00	\$4,000.00	Allison Mikola
Hospital de la Gente	Silvia Carlini	Hospital de la Gente-Mai	9/17/2009	10%	\$400.00	\$4,000.00	Chris Huffman
Brandee's Bakery	Liz Dittmeier	Brandee's Bakery-Boise K	9/29/2009	25%	\$3,000.00	\$12,000.00	Chris Huffman
Johnson Design & Build P	Gareth Cram	Johnson Design & Build-	9/11/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Hershey Chocolate Com	Milton Hershey	Hershey Chocolate-Wrap	9/20/2009	10%	\$1,200.00	\$12,000.00	Ernst Anderson
Widget Corporation	Max Headlong	Widget Corporation-Ware	9/29/2009	25%	\$1,250.00	\$5,000.00	Chris Huffman
Brock, Lathers and Freed	Dr. Deiter Brock	Brock, Lathers and Freed	9/27/2009	10%	\$750.00	\$7,500.00	Allison Mikola

Status Closed - Won **Total For Status:** \$61,000.00 **Weighted Total For Status:** \$61,000.00

<u>Company</u>	<u>Contact</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Mandrake Think Tank	Lionel Mandrake	Mandrake Think Tank-Fo	9/27/2009	100%	\$24,000.00	\$24,000.00	Chris Huffman
Mandrake Think Tank	Buck Turgidson	Mandrake Think Tank-W	9/4/2009	100%	\$5,000.00	\$5,000.00	Chris Huffman
Beautiful Friendship Bar	Louis Renault	New Opportunity	9/27/2009	100%	\$12,000.00	\$12,000.00	Ernst Anderson
Boomers Artworx	Richard Harvison	New Opportunity	9/20/2009	100%	\$2,000.00	\$2,000.00	Ernst Anderson
Django Consulting	Dan Minnick	Django Consulting-New	9/27/2009	100%	\$4,000.00	\$4,000.00	Allison Mikola
American Dreams	Hayleigh Frieda	American Dreams-New O	9/13/2009	100%	\$12,000.00	\$12,000.00	Allison Mikola
Cadbury	William Cadbury	Cadbury-Chocolate Blend	9/13/2009	100%	\$2,000.00	\$2,000.00	Chris Huffman

Status Closed - Lost **Total For Status:** \$14,000.00 **Weighted Total For Status:** \$0.00

<u>Company</u>	<u>Contact</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Black Forest Baking	Kristi Elmendorf	New Opportunity	9/13/2009	0%	\$0.00	\$12,000.00	Ernst Anderson
Bodega's Bodacious Birds	Melanie Daniels	New Opportunity	9/13/2009	0%	\$0.00	\$2,000.00	Allison Mikola



Pipeline Report by Sales Process and Stage

Date Range: 9/1/2009 - 9/30/2009

Total for Date Range: \$191,500.00

Weighted Total for Date Range: \$92,075.00

Process CHT1 Sales

Total For Process: \$181,500.00

Weighted Total For Process: \$88,575.00

Stage Commitment to Buy

Total For Stage: \$19,000.00

Weighted Total For Stage: \$19,000.00

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Buck Turgidson	Mandrake Think Tank	Mandrake Think Tank-War Room	9/4/2009	100%	\$5,000.00	\$5,000.00	Chris Huffman
Hayleigh Frieda	American Dreams	American Dreams-New Opportunity	9/13/2009	100%	\$12,000.00	\$12,000.00	Allison Mikola
William Cadbury	Cadbury	Cadbury-Chocolate Blending Plant	9/13/2009	100%	\$2,000.00	\$2,000.00	Chris Huffman

Stage Initial Communication

Total For Stage: \$65,000.00

Weighted Total For Stage: \$6,500.00

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Mackenzie Jensen	Brandee's Bakery	Brandee's Bakery-Bakery	9/27/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Ania Dawson	ABS Garages Ltd	ABS Garages-NSW	9/27/2009	10%	\$250.00	\$2,500.00	Ernst Anderson
Mike Campbell	Superclean	Superclean-Trow House Offices	9/11/2009	10%	\$1,200.00	\$12,000.00	Chris Huffman
Jordan Benedict	Bick's Longhorns	Bick's Longhorns-East Texas Operations	9/18/2009	10%	\$2,200.00	\$22,000.00	Chris Huffman
Marion Morrison	Duke Industries	Duke Industries-Santa Monica Offices	9/25/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Silvia Carlini	Hospital de la Gente	Hospital de la Gente-Main Office 2nd Up	9/17/2009	10%	\$400.00	\$4,000.00	Chris Huffman
Milton Hershey	Hershey Chocolate Company	Hershey Chocolate-Wrapping Room	9/20/2009	10%	\$1,200.00	\$12,000.00	Ernst Anderson
Dr. Deiter Brock	Brock, Lathers and Freedman	Brock, Lathers and Freedman-Cook Islan	9/27/2009	10%	\$750.00	\$7,500.00	Allison Mikola

Stage Needs Assessment

Total For Stage: \$27,500.00

Weighted Total For Stage: \$6,875.00

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Julie Britton	Quality Motors	Quality Motore-Garage	9/30/2009	25%	\$625.00	\$2,500.00	Chris Huffman
Bettie James...	Boomer's Artworx	Boomer's Artworx-Phoenix Expansion	9/25/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Liz Dittmeier	Brandee's Bakery	Brandee's Bakery-Boise Kitchens	9/29/2009	25%	\$3,000.00	\$12,000.00	Chris Huffman
Gareth Cram	Johnson Design & Build Partners	Johnson Design & Build-Edinburgh Sh	9/11/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Max Headlong	Widget Corporation	Widget Corporation-Warehouse	9/29/2009	25%	\$1,250.00	\$5,000.00	Chris Huffman

Stage Negotiation

Total For Stage: \$28,000.00

Weighted Total For Stage: \$23,800.00

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Est. Close</u>	<u>Prob.</u>	<u>Weighted</u>	<u>Total</u>	<u>Record Manager</u>
Louis Renault	Beautiful Friendship Bar & Grill	New Opportunity	9/27/2009	100%	\$12,000.00	\$12,000.00	Ernst Anderson
Jean Louise Finch	Finch Legal Aid	Finch Legal Aid-Offices	9/28/2009	65%	\$7,800.00	\$12,000.00	Allison Mikola
Dan Minnick	Django Consulting	Django Consulting-New Opportunity	9/27/2009	100%	\$4,000.00	\$4,000.00	Allison Mikola



Pipeline Report and Products by Sales Process and Stage

Date Range: 9/1/2009 - 9/30/2009

Total for Date Range: \$191,500.00

Weighted Total for Date Range: \$92,075.00

Process CHT1 Sales

Total For Process: \$181,500.00

Weighted Total For Process: \$88,575.00

Stage Commitment to Buy

Total For Stage: \$19,000.00

Weighted Total For Stage: \$19,000.00

Contact	Company	Opportunity Name	Product Name	Quantity	Adj. Price	Est. Close	Prob.	Weighted	Total	Record Manager
Buck Turgidson	Mandrake Think Tank	Mandrake Think Tank-W	ONE Component	2	\$2,500.00	9/4/2009	100%	\$5,000.00	\$5,000.00	Chris Huffman
Hayleigh Frieda	American Dreams	American Dreams-New O	TechONE System	1	\$12,000.00	9/13/2009	100%	\$12,000.00	\$12,000.00	Allison Mikola
William Cadbury	Cadbury	Cadbury-Chocolate Blend	Service Contract	1	\$2,000.00	9/13/2009	100%	\$2,000.00	\$2,000.00	Chris Huffman

Stage Initial Communication

Total For Stage: \$65,000.00

Weighted Total For Stage: \$6,500.00

Contact	Company	Opportunity Name	Product Name	Quantity	Adj. Price	Est. Close	Prob.	Weighted	Total	Record Manager
Mackenzie Jensen	Brandee's Bakery	Brandee's Bakery-Bakery	ONE Component	1	\$2,500.00	9/27/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Ania Dawson	ABS Garages Ltd	ABS Garages-NSW	ONE Component	1	\$2,500.00	9/27/2009	10%	\$250.00	\$2,500.00	Ernst Anderson
Mike Campbell	Superclean	Superclean-Trow House	TechONE System	1	\$12,000.00	9/11/2009	10%	\$1,200.00	\$12,000.00	Chris Huffman
Jordan Benedict	Bick's Longhorns	Bick's Longhorns-East Te	Service Contract	1	\$2,000.00	9/18/2009	10%	\$2,200.00	\$22,000.00	Chris Huffman
			TechONE System	1	\$12,000.00					
			TWO Component	2	\$4,000.00					
Marion Morrison	Duke Industries	Duke Industries-Santa M	ONE Component	1	\$2,500.00	9/25/2009	10%	\$250.00	\$2,500.00	Allison Mikola
Silvia Carlini	Hospital de la Gente	Hospital de la Gente-Mai	TWO Component	1	\$4,000.00	9/17/2009	10%	\$400.00	\$4,000.00	Chris Huffman
Milton Hershey	Hershey Chocolate Com	Hershey Chocolate-Wrap	TechONE System	1	\$12,000.00	9/20/2009	10%	\$1,200.00	\$12,000.00	Ernst Anderson
Dr. Deiter Brock	Brock, Lathers and Freed	Brock, Lathers and Freed	ONE Component	3	\$2,500.00	9/27/2009	10%	\$750.00	\$7,500.00	Allison Mikola

Stage Needs Assessment

Total For Stage: \$27,500.00

Weighted Total For Stage: \$6,875.00

Contact	Company	Opportunity Name	Product Name	Quantity	Adj. Price	Est. Close	Prob.	Weighted	Total	Record Manager
Julie Britton	Quality Motors	Quality Motore-Garage	ONE Component	1	\$2,500.00	9/30/2009	25%	\$625.00	\$2,500.00	Chris Huffman
Bettie James...	Boomer's Artworx	Boomer's Artworx-Phoeni	TWO Component	1	\$4,000.00	9/25/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Liz Dittmeier	Brandee's Bakery	Brandee's Bakery-Boise K	TechONE System	1	\$12,000.00	9/29/2009	25%	\$3,000.00	\$12,000.00	Chris Huffman
Gareth Cram	Johnson Design & Build P	Johnson Design & Build-	TWO Component	1	\$4,000.00	9/11/2009	25%	\$1,000.00	\$4,000.00	Ernst Anderson
Max Headlong	Widget Corporation	Widget Corporation-Ware	ONE Component	2	\$2,500.00	9/29/2009	25%	\$1,250.00	\$5,000.00	Chris Huffman

Stage Negotiation

Total For Stage: \$28,000.00

Weighted Total For Stage: \$23,800.00

Contact	Company	Opportunity Name	Product Name	Quantity	Adj. Price	Est. Close	Prob.	Weighted	Total	Record Manager
Louis Renault	Beautiful Friendship Bar	New Opportunity	TechONE System	1	\$12,000.00	9/27/2009	100%	\$12,000.00	\$12,000.00	Ernst Anderson



Won Opportunity Summary by Sales Process

Date Range: All Dates

Total For Date Range: \$944,200.00

Process CHT1 Sales

Count For Process: 113

Total For Process: \$930,200.00

Process CHT1 Service

Count For Process: 7

Total For Process: \$14,000.00



Won Opportunities by Sales Process and Competitor

Date Range: All Dates

Total For Date Range: \$944,200.00

Competitor		Count For Competitor:	Total For Competitor:			Total	Reason:	Competitor Percentage:	Record Manager
Contact	Company	Opportunity Name	Open Date	Close Date	Days Open	Total	Reason:	Record Manager	
Liz Dittmeier	Brandee's Bakery	Brandee's Bakery-New Opportunity	5/20/2007	8/24/2007	96	\$5,000.00	Excellent ROI Offered	Chris Huffman	
Neilson Watts	Superior Technologies Ltd	Superior Technologies-New Opportunity	5/20/2007	1/31/2008	256	\$24,000.00	Excellent ROI Offered	Chris Huffman	
Silvia Carlini	Hospital de la Gente	Hospital de la Gente-New Opportunity	4/18/2008	2/27/2009	315	\$7,500.00	ROI Offered by CH TechOne	Chris Huffman	
Hayleigh Frieda	American Dreams	American Dreams-New Opportunity	5/19/2009	9/13/2009	117	\$12,000.00	Went with lower price option	Allison Mikola	
Jackie Jorgensen	Ace Pet Store Franchises	Ace Pet Store-New Opportunity	5/20/2007	8/31/2007	103	\$12,000.00	Excellent ROI Offered	Chris Huffman	
Rob Hughes	Wedgwood Marshall & Wilson	Wedgewood Marshall & Wilson-New Opportunity	5/20/2007	10/31/2007	164	\$5,000.00		Chris Huffman	
Sean Duffy	Circle Photography	Circle Photography-New Opportunity	5/19/2009	1/23/2010	249	\$4,000.00	ROI Offered by CH TechOne	Ernst Anderson	
Ethan Edwards	Duke Industries	Duke Industries-New Opportunity	5/19/2010	8/21/2010	94	\$4,000.00		Allison Mikola	
Silvia Carlini	Hospital de la Gente	Hospital de la Gente-Main Office Upgrade	9/17/2009	6/30/2010	286	\$800.00	ROI Offered by CH TechOne	Chris Huffman	
Craig Potts	E H Studios	EH Studios-New Opportunity	5/20/2007	3/28/2008	313	\$2,500.00		Ernst Anderson	
William Cadbury	Cadbury	Cadbury-Chocolate Blending Plant	5/20/2009	9/30/2009	133	\$2,000.00		Chris Huffman	

Competitor		Count For Competitor:	Total For Competitor:			Total	Reason:	Competitor Percentage:	Record Manager
Contact	Company	Opportunity Name	Open Date	Close Date	Days Open	Total	Reason:	Record Manager	
Alexander O'Brien	Manxsys Financial	New Opportunity	4/18/2008	3/18/2009	334	\$12,000.00	ROI Offered by CH TechOne	Chris Huffman	
Dr. Brian Bayne, M.D.	Dr. Brian Bayne, M.D.	Dr Brian Bayne-New Opportunity	11/19/2009	3/26/2010	127	\$12,000.00		Ernst Anderson	

Competitor		Count For Competitor:	Total For Competitor:			Total	Reason:	Competitor Percentage:	Record Manager
Contact	Company	Opportunity Name	Open Date	Close Date	Days Open	Total	Reason:	Record Manager	
Colleen McCarthy	Ace Pet Store Franchises	Ace Pet Store-TechONE	4/13/2008	4/13/2008	0	\$12,000.00	ROI Offered by CH TechOne	Chris Huffman	
Morgan Kennedy	Coffee Producers of Australia	Coffee Producers-Roasting Plant	10/5/2009	4/14/2010	191	\$7,500.00	ROI Offered by CH TechOne	Allison Mikola	
Frank Bullit	Taylor Street Protection Agency	Taylor Street Protection -New Opportunity	6/10/2008	9/30/2008	112	\$2,000.00		Chris Huffman	



Won Opportunities by Sales Process and Reason

Date Range: All Dates

Total For Date Range: \$944,200.00

Process CHT1 Service **Count For Process:** 7 **Total For Process:** \$14,000.00 **Process Percentage:** 1.48%

Reason **Count For Reason:** 4 **Total For Reason:** \$8,000.00 **Reason Percentage:** 0.85%

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Record Manager</u>	<u>Competitor</u>
Louis Renault	Beautiful Friendship Bar & Grill	Beautiful Friendship-SC	5/19/2009	12/13/2009	208	\$2,000.00	Ernst Anderson	
Bill Willis	Willis Enterprises	Willis Enterprises-SC	5/20/2007	2/29/2008	285	\$2,000.00	Chris Huffman	
Andy Harrison	A1 Services	A1 Services-SC	5/20/2009	8/29/2009	101	\$2,000.00	Ernst Anderson	
Gavin Maxwell	Macolm Hall Associates	Malcolm Hall-SC	5/20/2007	7/31/2008	438	\$2,000.00	Ernst Anderson	

Reason Current Client Relationship **Count For Reason:** 1 **Total For Reason:** \$2,000.00 **Reason Percentage:** 0.21%

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Record Manager</u>	<u>Competitor</u>
UR Powerful	Captains of Industry	COI-SC	3/17/2010	7/29/2010	134	\$2,000.00	Chris Huffman	

Reason Local Representation **Count For Reason:** 1 **Total For Reason:** \$2,000.00 **Reason Percentage:** 0.21%

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Record Manager</u>	<u>Competitor</u>
UR Powerful	Captains of Industry	COI-SC for Bellaire Offices	11/28/2008	11/28/2008	0	\$2,000.00	Chris Huffman	Technology Consultants Inc

Reason ROI Offered by CH TechOne **Count For Reason:** 1 **Total For Reason:** \$2,000.00 **Reason Percentage:** 0.21%

<u>Contact</u>	<u>Company</u>	<u>Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Record Manager</u>	<u>Competitor</u>
Liz Dittmeier	Brandee's Bakery	Brandee's Bakery-SC	10/30/2009	11/13/2009	14	\$2,000.00	Allison Mikola	



Won Opportunities by Sales Process and Record Manager

Date Range: All Dates

Total For Date Range: \$944,200.00

Record Manager Allison Mikola **Count For Record Manager:** 27 **Total For Record Manager:** \$212,800.00 **Record Manager Percentage:** 22.54%

<u>Contact</u>	<u>Company</u>	<u>Opportunity Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Reason:</u>	<u>Competitor</u>
Dr. Deiter Brock	Brock, Lathers and Freedman	Brock, Lathers and Freedman-Plant	4/27/2009	10/25/2009	181	\$12,000.00	ROI Offered by CH TechOne	
Dan Minnick	Django Consulting	Django Consulting-New Opportunity	5/19/2009	2/14/2010	271	\$12,000.00		
Ethan Edwards	Duke Industries	Duke Industries-New Opportunity	5/19/2009	2/28/2010	285	\$4,000.00		
Jonathan Jenkins	Circle Photography	Circle Photography-New Opportunity	5/19/2009	1/17/2010	243	\$4,000.00		
Sam McCord	Duke Industries	Duke Industries-New Opportunity	5/19/2009	3/30/2010	315	\$12,000.00		
Hayleigh Frieda	American Dreams	American Dreams-New Opportunity	5/19/2009	9/13/2009	117	\$12,000.00	Went with lower price option	
Ethan Edwards	Duke Industries	Duke Industries-New Opportunity	5/19/2010	8/21/2010	94	\$4,000.00		

Record Manager Chris Huffman **Count For Record Manager:** 58 **Total For Record Manager:** \$572,100.00 **Record Manager Percentage:** 60.59%

<u>Contact</u>	<u>Company</u>	<u>Opportunity Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Days Open</u>	<u>Total</u>	<u>Reason:</u>	<u>Competitor</u>
Kelsey Reay	S D Enterprises	SD Enterprises-New Opportunity	5/20/2007	8/29/2008	467	\$5,000.00		
Bruce Baker	SimAero	SimAero-Picacho Offices	5/20/2007	6/30/2008	407	\$5,000.00		
Bruce Baker	SimAero	SimAero-Upgrade to TWO	5/20/2007	5/23/2008	369	\$4,000.00		
Gracie Anderson	Searchlight Casting	Searchlight Casting-Tempe	4/27/2009	7/30/2009	94	\$12,000.00	Current Client Relationship	
Angela Ives	A1 Services of UK	A1 Services of UK-Portable Unit	5/15/2007	4/13/2009	699	\$12,000.00	ROI Offered by CH TechOne	
Louise Harper	Stevenson & Smith	Stevenson & SMith-Office Upgrades	5/19/2009	1/17/2010	243	\$5,000.00		
Danielle Middlebury	Sewing Room;The	Sewing Room-New Facility	5/20/2007	5/30/2008	376	\$24,000.00		
Dan Minnick	Django Consulting	Django Consulting-Install TechONE	4/18/2008	12/30/2008	256	\$12,000.00		Reusable Assets Co
Colleen McCarthy	Ace Pet Store Franchises	Ace Pet Store-TechONE	4/13/2008	4/13/2008	0	\$12,000.00	ROI Offered by CH TechOne	GreenTech Management Corp
Anthony Keltie	Spin Recording Studios	New Opportunity	5/20/2007	3/31/2008	316	\$24,000.00		
Charlie Allnut	River Rat Tours	New Opportunity	5/20/2007	8/29/2008	467	\$2,000.00		



Opportunities by Estimated Closing Month

Date Range: 9/1/2009 - 9/30/2009

Weighted Total For Date Range: \$31,075.00

Total For Date Range: \$130,500.00

Process CHT1 Service

Count For Process: 4

Weighted Total For Process: \$3,500.00

Total For Process: \$10,000.00

Contact	Company	Name	Open Date	Est. Close	Days Open	Weighted Total	Total	Record Manager
Kelsey Reay	S D Enterprises	SD Enterprises-SC	9/18/2009	9/30/2009	0	\$500.00	\$2,000.00	Chris Huffman
Jane Bellamy	Boomers Artworx	Boomer's Artworx-Service Contract for Headquarters	4/22/2009	9/29/2009	149	\$1,000.00	\$2,000.00	Chris Huffman
Bettie James	Boomer's Artworx	Boomer's Artworx-SC for Scottsdale Offices	5/19/2009	9/18/2009	122	\$1,000.00	\$2,000.00	Chris Huffman
Jackie Jorgensen	Ace Pet Store Franchises	Ace Pet Store-SC for Corp Offices	5/14/2009	9/27/2009	127	\$1,000.00	\$4,000.00	Allison Mikola

CHT1 Service

Plan Total by Month

Weighted Total by Month

January:	\$0.00	\$0.00
February:	\$0.00	\$0.00
March:	\$0.00	\$0.00
April:	\$0.00	\$0.00
May:	\$0.00	\$0.00
June:	\$0.00	\$0.00
July:	\$0.00	\$0.00
August:	\$0.00	\$0.00
September:	\$10,000.00	\$3,500.00
October:	\$0.00	\$0.00
November:	\$0.00	\$0.00
December:	\$0.00	\$0.00



Opportunities By Record Manager and Process

Date Range: 9/1/2009 - 9/30/2009

Total For Date Range: \$191,500.00

Record Manager	Allison Mikola	Number of Opportunities: 8	Total For Record Manager:	\$48,500.00	% of Total: 25.33%
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Process	CHT1 Sales	Number of Opportunities: 7	Total For Process:	\$44,500.00	% of Total: 23.24%
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Status	Open	Number of Opportunities: 5	Total For Status:	\$28,500.00	% of Total: 14.88%
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Status	Contact	Company	Name	Stage	Prob.	Est. Close	Weighted	Total
Open	Mackenzie Jensen	Brandee's Bakery	Brandee's Bakery-Bakery	Initial Communication	10%	9/27/2009	\$250.00	\$2,500.00
Open	Jean Louise Finch	Finch Legal Aid	Finch Legal Aid-Offices	Negotiation	65%	9/28/2009	\$7,800.00	\$12,000.00
Open	Marion Morrison	Duke Industries	Duke Industries-Santa Mon	Initial Communication	10%	9/25/2009	\$250.00	\$2,500.00
Open	John Chance	Duke Industries	Duke Industries-Santa Mon	Presentation	40%	9/20/2009	\$1,600.00	\$4,000.00
Open	Dr. Deiter Brock	Brock, Lathers and Freedman	Brock, Lathers and Freedm	Initial Communication	10%	9/27/2009	\$750.00	\$7,500.00

Status	Closed - Won	Number of Opportunities: 2	Total For Status:	\$16,000.00	% of Total: 8.36%
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Status	Contact	Company	Name	Stage	Prob.	Est. Close	Weighted	Total
Closed - Won	Dan Minnick	Django Consulting	Django Consulting-New Op	Negotiation	100%	9/27/2009	\$4,000.00	\$4,000.00
Closed - Won	Hayleigh Frieda	American Dreams	American Dreams-New Op	Commitment to Buy	100%	9/13/2009	\$12,000.00	\$12,000.00

Process	CHT1 Service	Number of Opportunities: 1	Total For Process:	\$4,000.00	% of Total: 2.09%
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Status	Open	Number of Opportunities: 1	Total For Status:	\$4,000.00	% of Total: 2.09%
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Status	Contact	Company	Name	Stage	Prob.	Est. Close	Weighted	Total
Open	Jackie Jorgensen	Ace Pet Store Franchises	Ace Pet Store-SC for Corp	Service Site Visit	25%	9/27/2009	\$1,000.00	\$4,000.00



Opportunity Summary by Record Manager and Process

Date Range: All Dates

Total For Date Range: \$2,427,200.00

Record Manager	Allison Mikola	Number of Opportunities: 82	Total For Record Manager:	\$616,300.00	% of Total: 25.39%
Process	CHT1 Sales	Number of Opportunities: 73	Total For Process:	\$596,300.00	% of Total: 24.57%
Status	Open	Number of Opportunities: 46	Total For Status:	\$383,500.00	% of Total: 15.80%
Status	Closed - Won	Number of Opportunities: 27	Total For Status:	\$212,800.00	% of Total: 8.77%
Process	CHT1 Service	Number of Opportunities: 9	Total For Process:	\$20,000.00	% of Total: 0.82%
Status	Open	Number of Opportunities: 8	Total For Status:	\$18,000.00	% of Total: 0.74%
Status	Closed - Won	Number of Opportunities: 1	Total For Status:	\$2,000.00	% of Total: 0.08%
Record Manager	Chris Huffman	Number of Opportunities: 166	Total For Record Manager:	\$1,377,400.00	% of Total: 56.75%
Process	CHT1 Sales	Number of Opportunities: 144	Total For Process:	\$1,327,100.00	% of Total: 54.68%
Status	Open	Number of Opportunities: 86	Total For Status:	\$755,000.00	% of Total: 31.11%
Status	Closed - Won	Number of Opportunities: 58	Total For Status:	\$572,100.00	% of Total: 23.57%
Process	CHT1 Service	Number of Opportunities: 22	Total For Process:	\$50,300.00	% of Total: 2.07%
Status	Open	Number of Opportunities: 19	Total For Status:	\$44,300.00	% of Total: 1.83%
Status	Closed - Won	Number of Opportunities: 3	Total For Status:	\$6,000.00	% of Total: 0.25%
Record Manager	Ernst Anderson	Number of Opportunities: 85	Total For Record Manager:	\$433,500.00	% of Total: 17.86%
Process	CHT1 Sales	Number of Opportunities: 74	Total For Process:	\$411,500.00	% of Total: 16.95%
Status	Open	Number of Opportunities: 46	Total For Status:	\$266,200.00	% of Total: 10.97%
Status	Closed - Won	Number of Opportunities: 28	Total For Status:	\$145,300.00	% of Total: 5.99%

WE DID IT AGAIN!

SwiftPage HIRED TECH BENDERS TO CORRECT THE

REPORT FLAWS

THAT HAVE PLAQUED Act! USERS

SINCE Act! 2005

AS A BONUS WE UPDATED THE

History Summary Classic Report to include:

Email Count

&

Added the Activities with Rollover Days Report



History Summary Classic

Karen Fredricks, Tech Benders - Florida
23438 Alzira Circle
Suite 300
Boca Raton, FL 33433

Date Range: All Dates

Contact	Company	Attempted Calls	Completed Calls	Meetings Held	E-mail Sent
Tommy Morgan	Great Northern Coffee	0	0	0	0
Marion Morrison	Duke Industries	0	0	0	0
Merkin Muffley	Mandrake Think Tank	0	0	0	0
Irene Murphy	Mears Insurance	0	0	0	0
Scott Nagengast	Nagengast Estate Winery	0	1	0	0
Dylan Nguyen	Freemont Corp	0	0	0	0
Rudy Nordstrom	Jake Flakes Inc.	0	1	0	0
Alexander O'Brien	Manxsys Financial	0	0	1	0
Clarence Oddbody	Liberty Savings & Loan	0	0	0	0
Lance Parker	Yellow Jersey Bikes	0	0	1	1
Melissa Pearce	Tech Benders - Florida	0	0	51	0
Craig Potts	E H Studios	0	1	0	0
UR Powerful	Captains of Industry	0	0	0	0
David Purkis	FP Building Supplies	0	1	0	0
Kelsey Reay	S D Enterprises	0	0	0	0
Steve Reese	Mutthound Enterprises	0	0	0	0
Louis Renault	Beautiful Friendship Bar & Grill	0	1	0	0
Juliette Rosseux	Tech Benders - Florida	0	0	51	0
Meagan Ryan	Got Mail Inc.	0	0	0	2
Keifer Saccucci	MI Business Plan, Inc.	0	0	0	0
Rebecca Salter	Unique Systems	0	0	0	0
Rose Sayer	River Rat Tours	0	0	0	0
Anna Schmidt	Parisian Publishing	0	0	1	0
Mark Scott	Dunder Miffline Inc	0	0	0	2
Annette Sharkey	Goldfish Records	0	0	0	0
David Shrute	Dunder Miffline Inc.	0	0	0	2
Brandon Sloan	Sierra's Cafe	0	0	0	0
Howard Smith	Griping International	0	0	0	2
Jonathan Sommer	Tech Benders - Florida	0	11	2	0
Carl Spackler	Golf Greens Extraordinaire	0	0	0	0
Kate Starcup	Twelfth Dream	0	0	0	0
Alice Sweet	VoiceComUSA	0	0	0	2
Melanie Thompson	Party Perfeccion Inc.	0	0	0	0
Rockwell Torrey	Duke Industries	0	0	0	0
Ethan Turnbull	F G Landscape & Design	0	0	0	0
Jim Walking	VoiceComUSA	0	0	0	2
Melissa Weather	Griping International	0	0	0	2
Ty Webb	Golf Greens Extraordinaire	0	0	0	0
Sarah Whiting	Tech Benders - Florida	0	11	1	0
Bill Willis	Willis Enterprises	0	0	1	0
Michaela J. Zip	Django Consulting	0	1	0	0
Total:		1	68	296	29



Activities With Rollover Days

Karen Fredricks, Tech Benders - Florida
23438 Alzira Circle
Suite 300
Boca Raton, FL 33433

Date Range: 2/1/2016 - 2/29/2016

Contact	Mackenzie Jensen		Brandee's Bakery		(208) 555-2211	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/1/2016	12:30 PM	1 hour 30 minutes	0	Lunch Meeting	Allison Mikola
Contact	Anthony Keltie		Spin Recording Studios		0176 843070	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/9/2016	11:00 AM	45 minutes	0	Presentation	Karen Fredricks
Contact	Morgan Kennedy		Coffee Producers of Australia		07 999 1 1234	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/29/2016	12:30 PM	1 hour 30 minutes	-46	Lunch Meeting	Allison Mikola
Contact	George Limnoff		MiniSoft		(480) 555-2144	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Call	2/23/2016	10:30 AM	30 minutes	0	Confirm Appointment	Allison Mikola
Contact	Wilhelm Loke		Yellow Jersey Bikes		(619) 555-8892	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/15/2016	2:30 PM	1 hour	0	Opportunity Name: "YJBikes-Texas Operations" Process Name: "" Stage Name: "Negotiation"	Karen Fredricks
Contact	Morty Manicotti		Corleone's Pasta Company		(480) 555-4512	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/2/2016	12:30 PM	1 hour 30 minutes	-29	Lunch Meeting	Allison Mikola
Contact	Colleen McCarthy		Ace Pet Store Franchises		(423) 555-1221	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/9/2016	10:30 AM	30 minutes	0	Presentation	Allison Mikola
Contact	Jason McCourt		Newtown Builders Ltd.		0178 965655	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Meeting	2/22/2016	9:30 AM	1 hour	0	Presentation	Karen Fredricks
Contact	Chris Mears		Mutthound Enterprises		01789 656556	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Call	2/26/2016	10:30 AM	30 minutes	-31	Confirm Appointment	Allison Mikola
Contact	Danielle Middlebury		The Sewing Room		(415) 555-2242	
Type	Date	Time	Duration	Days Rolled	Regarding & Details	Scheduled For
Call	2/12/2016	10:30 AM	30 minutes	-31	Confirm Appointment	Allison Mikola