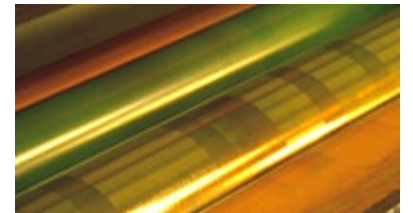


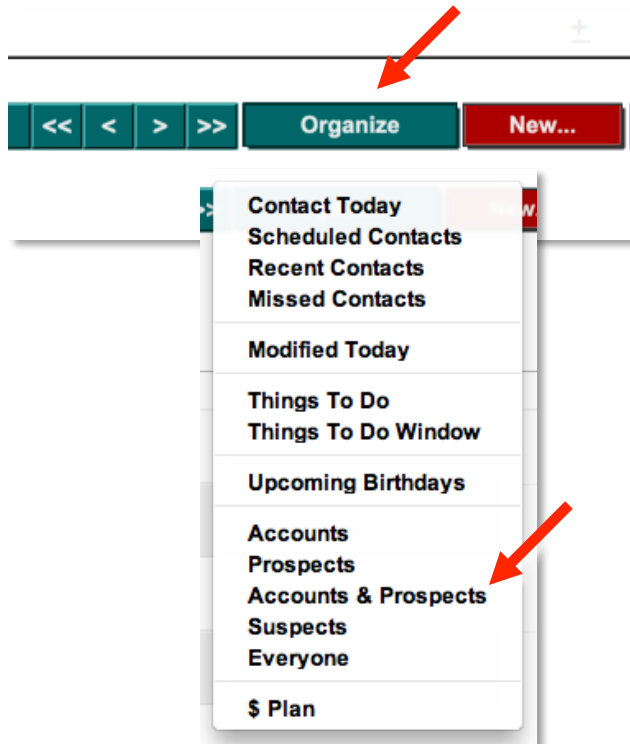
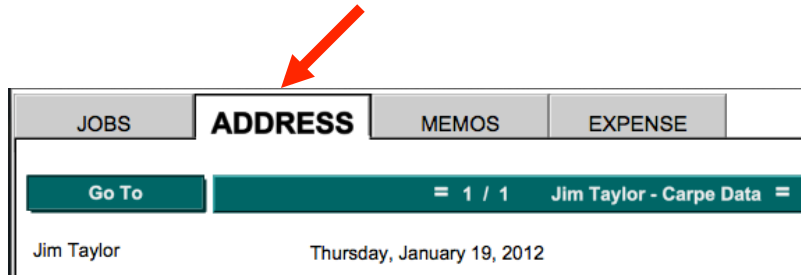
JOBZ!

Annual Sales Budgeting

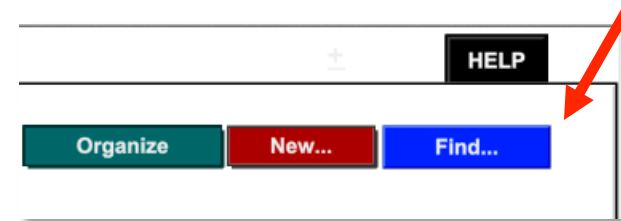


ADDRESS Menu

Start by listing your Accounts & Prospects



Or, FIND contacts by any number of criteria- both will take you to LIST view



ADDRESS LIST Views

Date View is the default, \$ View and Segment View are options



Go To		1 / 140	<<	<	>	>>	Organize	New...	Actions	Output	Find...	HELP
Segment View	Date View	\$ View	More Detail				Clear X		Find Select X	X All		
Company	Name						Next Contact				Last Contact	
11 by Seventeen	Paige Turner 408-395-8183	+0 +1 +7	Tue 2/28	Follow up		Wed 1/18	Sent Proposal					
24 Seven	Serge Protector 408-395-8183	+0 +1 +7	Tue 1/24	Follow up		Mon 1/16	Created Memo					
24 Seven	Noah Dia 408 395-8183	+0 +1 +7	Thu 1/19	Follow up		Sun 1/15	Created Memo					
Federal Motors	Alan Greasepan 408 395-8183	+0 +1 +7	Fri 1/20	Follow up		Sat 1/14	Mailing					
Five, Inc	Shelby Released 408 395-8183	+0 +1 +7	Sat 1/21	Follow up		Fri 1/13	Mailing					
Five, Inc	Kurt Reply 408 395-8183	+0 +1 +7	Sun 1/22	Follow up		Thu 1/12	Mailing					
File Edit View, Inc.	Rachel Tensions 408 395-8183	+0 +1 +7				Thu 1/12	Sent Proposal					
Henpect	Hugo First 408 395-8183	+0 +1 +7	Mon 1/23	Follow up		Wed 1/11	Test Campaign					

Underlined column headers will sort the list



Go To		1 / 140	<<	<	>	>>	Organize	New...	Actions	Output	Find...	HELP
Segment View	Date View	\$ View					Clear X		Find Select X	X All	Prepare to	
Company	Name		Modified	Select X	Category	Temp.	Sales Rep	<u>Budget</u>	YTD	Last Year	12 Months	
11 by Seventeen	Paige Turner 408-395-8183				Q Account	Target	Jim Taylor	\$1,102,000		\$513,579	\$476,656	
Buffalo Rome	Allen Wrench 408 395-8183				Q Account	Target	Jimmy Buffett	\$500,000	\$71,837	\$342,234	\$414,071	
11 by Seventeen	Ben Around 408 395-8183				Q Account	Hot	Jerry Garcia	\$479,000				
Database Testing, Inc.	Rich Text 408 395-8183 x123				Q Account	Target	Jim Taylor	\$407,500		\$94,287	\$94,287	
File Edit View, Inc.	Hugh Saturation 408 395-8183				Q Account	Warm	Jim Taylor	\$370,000	\$45,629	\$28,851	\$74,480	
Abort Retry Ignore	Serge Protector 408 395-8183				Q Account	Target	Jimmy Buffett	\$362,500		\$14,376	\$14,376	
Database Testing, Inc.	Phil Thepresses 408 395-8183				Q Account	Hot	Jim Taylor	\$340,000		\$140,657	\$140,657	

ADDRESS INPUT Screen

Click on a listed contact to go to their Input screen, then click the Budget Tab

Go To = 1 / 140 = << < > >> Organize New... Output Actions Find...

Name Ms. Paige Turner
 Title Designer
 Company 11 by Seventeen
 Co. Type Paper
 Address 2538 22nd Street
 Address Line 2 Suite A4 Country:
 City, State, Zip Opa City WI 54956
 Email carpedata@mac.com
 Office 408-395-8183 Cell
 Fax Home
 Cust. # 36805
 Category Account Temp. Target

Contacts Segments ... Regional Company Links Codes
 Today Thursday Jan. 19, 2012 133 Contacts
 Last Contact Wed 1/18/12 7:58 AM 1 Days Ago
 What Sent Proposal Clear X
 Comment Havana Daydream Believer Find X
 Next Contact 1day 1wk 2wk 1mo 0
 Date Tue 2/28/12 Min.
 What Follow up +1 +30
 Why Porsche ?
 Delegate To Do ≤

Challenged! Review 1/24/2011

Paige Turner's Coworkers
 San Diego Store #18
 San Francisco Store #1
 San Jose Store #23
 Accounts Payable
 Central Receiving
 Sacramento Store #13
 LA Store #14
 Portland Store #17
 Atlanta Store #19
 Hillsboro Store #22
 Bend Store #32
 Antioch Store #40
 Chicago Store #8
 Hayward Store #9
 Jim Taylor
 Paige Turner

JOBS	/ date	PO	MEMOS	- from	Notes	Delivery	Budget	Alt.
Month	Year	Plant	Type				Amount	
July	X 2012	LA					\$152,000	
August	X 2012	LA					\$250,000	
September	X 2012	LA					\$600,000	
October	X 2012	IRV					\$100,000	
12 Mo	\$476,656	2011	\$513,579	Budget			\$1,102,000	
\$ Plan Note	\$Plan	Budget Report	Chart	YTD			\$0	

The "\$ Plan" shows last year's sales, this years sales and your budget for the contact (in red until it is met.)

Contact History Delegated To Do Ownership
 1/18/2012 7:58:16 AM JT:
 Sent Proposal Havana Daydream Believer
 12/31/2011 11:07:22 AM JT:
 Created Memo Save Folder Instructions
 12/27/2011 11:07:22 AM JT:
 Sent Proposal JOBZ! New Capabilities
 12/27/2011 10:13:41 AM JT:
 Sent Proposal JOBZ! New Capabilities
 12/18/2011 8:54:56 AM JT:
 Sent Proposal Mailit Up to SOP
 12/18/2011 8:47:11 AM JT:
 Sent Proposal Mailit Example
 12/18/2011 8:38:33 AM JT:
 Sent Proposal Mailit Example
 12/16/2011 2:36:25 PM JT:
 Sent Proposal Drifter's Revenge is Cold

Budget Tab

- Select Month, Year
- Enter Projected Sales
 - For that Month
 - To this Contact
- Enter Plant & Press Type if requested by manager.
- Use as many lines as you need.

Category	Account	Temp.	Target
JOBZ	/ date	PO	MEMOS - from Notes Delivery Budget Alt.
Month	Year	Plant	Type
July	X 2012	LA	\$152,000
January	X 2012	LA	\$250,000
February	X 2012	LA	\$600,000
March	X 2012	IRV	\$100,000
April	X		
May	6,656 2011	\$513,579	Budget \$1,102,000
June			YTD \$0
July			
August			
September			
October			
November			
December			

Shows last year's sales, this years sales and your contact (in red until it is met.)

If you have been using JOBZ! to enter orders, then previous sales amounts will display for your reference.

12 Mo	\$476,656	2011	\$513,579	Budget	\$1,102,000
\$ Plan Note	\$Plan	Budget Report	Chart	YTD	\$0
The "\$ Plan" shows last year's sales, this years sales and your budget for the contact (in red until it is met.)					

Trailing 12 months and last calendar year FYI.

Budget will turn black when the Year To Date meets it.

Browse Contacts

Go to the (first / previous / next / last) contact in the found set

Return to List

Go To = 1 / 140 =

<< < > >>

Name Ms. Paige Turner

Title Designer

Company 11 by Seventeen

Underlined column headers will sort the list

Go To	1 / 140	<<	<	>	>>	Organize	New...	Actions	Output	Find...	HELP
Segment View	Date View	\$ View									
Company	Name	Modified	Select X	Category	Temp.	Sales Rep	Budget	YTD	Last Year	12 Months	
11 by Seventeen	Paige Turner 408-395-8183			Account	Target	Jim Taylor	\$1,102,000		\$513,579	\$476,656	
Buffalo Rome	Allen Wrench 408 395-8183			Account	Target	Jimmy Buffett	\$500,000	\$71,837	\$342,234	\$414,071	
11 by Seventeen	Ben Around 408 395-8183			Account	Hot	Jerry Garcia	\$479,000				
Database Testing, Inc.	Rich Text 408 395-8183 x123			Account	Target	Jim Taylor	\$407,500		\$94,287	\$94,287	
File Edit View, Inc.	Hugh Saturation 408 395-8183			Account	Warm	Jim Taylor	\$370,000	\$45,629	\$28,851	\$74,480	
Abort Retry Ignore	Serge Protector 408 395-8183			Account	Target	Jimmy Buffett	\$362,500		\$14,376	\$14,376	
Database Testing, Inc.	Phil Thepresses 408 395-8183			Account	Hot	Jim Taylor	\$340,000		\$140,657	\$140,657	

See Your Budget

October	X	2012	IRV		\$100,000
	X				
12 Mo	\$476,656	2011	\$513,579	Budget	\$1,102,000
\$ Plan Note	\$Plan	Budget Report	Chart	YTD	\$0
The "\$ Plan" shows last year's sales. This year's sales and your budget for the contact (in red until it is met.)					

Roll it up in a Budget Report

Keep an eye
on your budget
as you go
through the
year with the
\$Plan

The \$Plan

Print a hard copy of the \$Plan.

Go To	Organize	New...	Actions	Output	1 / 11	<<	<	>	>>	Fin...	HELP		
Less Detail											Clear X	Fin Select X	X All
Company	Name	Omit	Select	Last Contact	Since Last	#	Next	+	-	Temp.	Segment	\$Plan Report	\$Plan Chart
11 by Seventeen	Paige Turner 408-395-8183			Today	Wed 1/18	1 / 133	Next +1 +30 Tue 2/28			Target Account	Demo Brochures Direct Mail Web	The "\$ Plan" shows last year's sales, this year's sales and your budget for the contact (in red until it is met.)	
				What	Sent Proposal					Follow up	What		
				Result	Havana Daydream					Porsche			
				1/18/2012 7:58:16 AM JT: Sent Proposal Havana Daydream Believer 12/31/2011 11:07:22 AM JT: Created Memo Save Folder Instructions 12/27/2011 11:07:22 AM JT:							Last Year \$513,579	YTD \$0	Budget \$1,102,000
Jim Taylor													
Buffalo Rome	Allen Wrench 408 395-8183			Today	Sun 12/25	25 / 6	Next +1 +30 Thu 2/9			Target Account	Folding Cartons	This is a brief description of how you intend to sell to this contact. There is also a detailed company-level plan.	
				What	Sent Proposal					Follow up	What		
				Result	Jimmy Has Left the					re: Cartons			
				12/16/2011 3:11:51 PM JT: Sent Proposal Jimmy Has Left the Building 5/11/2010: Reassigned 1/5/2010: Imported 12/31/2009: Mailing FoldingCtnDiv							Last Year \$342,234	YTD \$71,837	Budget \$500,000
Jimmy Buffett													
Database Testing, Inc.	Rich Text 408 395-8183 x123			Today	Sat 12/24	26 / 184	Next +1 +30 Fri 2/10			Target Account	Demo Digital Posters Newsletter Annual Reports	Rich buys the best printing and the best wine.	
				What	Created Memo					Lunch	What		
				Result	Starting With Aart					At Sly's			
				1/2/2012 11:22:48 AM JT: Created Memo Starting With Aart Group Memo 1/2/2012 11:22:48 AM JT: Created Memo starting With Rich 1/2/2012 4:09:13 PM JT:							Last Year \$94,287	YTD \$0	Budget \$407,500
Jim Taylor													
File Edit View, Inc.	Hugh Saturation 408 395-8183			Today	Fri 12/2	48 / 22	Next +1 +30 Sat 3/3			Warm Account	JOBZNews3 Demo Inline Folding Cartons	The only real question is what to do next. Though what you did last year can be informative.	
				What	Mailing					Check in	What		
				Result	UV Coating					Banking sample			
				1/11/2011: Mailing UV Coating 1/11/2011: Spoke Very interested 1/11/2011: Sent eMail Test Demo 12/8/2010: Sent Email Subject 10/15/2010: JOBZ News							Last Year \$28,851	YTD \$45,629	Budget \$370,000
Jim Taylor													

Visual View

Total will be red until you meet the budget with YTD (Year To Date) sales.

Jobs with an invoice date and Billed status total here.
(YTD includes Working jobs.).

The \$Plan

11 by Seventeen Paige Turner 408-395-8183	Today Thu 9/17 Since Last / # 14 / 1 What Sent Proposal Result Hecht With it All 9/23/2009 Previous Cust. # 051.301796 9/17/2009: Sent Proposal Hecht With it All 8/20/2009: Sent Email Re: Shipping hours Jim Taylor	Next +1 +30 Wed 9/23 Target Account Follow up Reason for the follow-up; something to talk about. Last Year \$37,856 YTD \$302,484 Budget \$632,000	Demo Catalogs The "\$ Plan" shows last year's sales, this year's sales and your budget for the contact (in red until it is met.)
Database Testing, Inc. Rich Text 408 395-8183 x123	Today Thu 9/17 Since Last / # 14 / 44 What Mailing Result Bud sample 9/23/2009 Previous Cust. # 100061 9/17/2009: Mailing Bud sample 9/16/2009: Good Conversation Will let us quote 9/7/2009: Sent Proposal Down The Highway 4/1/2009: Reassigned From: Jimmy Buffett Jim Taylor	Next +1 +30 Thu 10/22 Target Account Get meeting Need to quote the annual report this year! Last Year \$92,703 YTD \$469,386 Budget \$400,000	Digital Variable Data Mailing Fulfillment Demo Rich buys the best printing and the best wine.
			\$1,032,000

At the bottom of the \$Plan will be your total rolled-up budget.
 If it isn't enough, find someone else to sell to, or increase an existing budget :-)

Budget Report

Annual Total for the rep

Total for the rep for the month

Total for the company
for the rep for the month

Total for the contact
for the rep for the month

Sales Budget

10/1/09

Jim Taylor \$1,102,000

January	\$435,000	\$335,000 Database Testing, Inc. Rich Text \$200,000 CAD Phil Thepresses \$10,000 SF Noah Dia \$125,000 PDX
February	\$55,000	\$100,000 File Edit View, Inc. Ken Tankerous \$100,000 SF
March	\$20,000	\$55,000 Database Testing, Inc. Rich Text \$10,000 SF Phil Thepresses \$20,000 OC Noah Dia \$25,000 SEA
April	\$10,000	\$20,000 Database Testing, Inc. Rich Text \$10,000 LA Noah Dia \$10,000 OC
May	\$60,000	\$10,000 Database Testing, Inc. Rich Text \$10,000 SF
June	\$110,000	\$60,000 Database Testing, Inc. Rich Text \$60,000 LA
July	\$152,000	\$110,000 Database Testing, Inc. Rich Text \$110,000 LA
August	\$250,000	\$152,000 11 by Seventeen Paige Turner \$152,000 PDX
September	\$10,000	\$250,000 11 by Seventeen Paige Turner \$250,000 OC
	\$1,102,000	\$10,000 11 by Seventeen Paige Turner \$10,000 LA

Plant sold into

Roll-Up For Managers:

- Sales Reps do their budgets and check their results themselves as shown on the preceding slides
- You have access to all their records, so you can edit them and review them in the same way they do
- Your access is by Sales Region, so the reports will show all reps in your region
- You also have access to the Manager screen (Go To: Manager), where you have additional reports.

History	Challenge	Segments	Campaigns	Housekeeping	Budget	Account Lists
Month	Year	Plant	Type	Amount		
July	X 2012	LA		\$152,000		
August	X 2012	LA		\$250,000		
September	X 2012	LA		\$600,000		
October	X 2012	IRV		\$100,000		
	X					
12 Mo					\$476,656	2011
					\$513,579	Budget
					\$1,102,000	YTD
					\$0	

\$ Plan: How to sell Paige Turner \$1,102,000
 The "\$ Plan" shows last year's sales, this years sales and your budget for the contact (in red until it is met.)

Budget Reports

[/Rep /Month /Customer /Contact](#)

[/Month /Rep /Customer /Contact](#)

[/Month /Plant /Rep /Customer](#)

[Budget Pie Chart](#)

Filtered Budget Reports

Detailed **Summary**

[/Rep /Month /Cust /Contact](#) [/Region /Rep](#)

[/Month /Rep /Cust /Contact](#) [/Month /Rep](#)

[/Plant /Region /Month](#)

Filtered Budget Report Title

Target Accounts Only

Budget Year Default 2012

[Reset all existing to above year](#) [Table](#)

Excel export