

# Report 360

## Prebuilt Reports Library

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# PREBUILT REPORTS

## Sales Rep 360 Report



Sales Rep 360°  
2016-10-03

Sales Rep Daniel Sernbo  
Title Sales Manager  
Supervisor Cameron Murdock  
Birth Date 1975-08-04  
Hire date 2013-04-27  
Last Review 2015-05-02



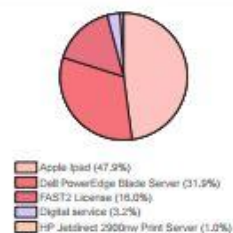
TOP 5 KEY ACCOUNTS	TOTAL	THIS ROLLING 12 MONTHS	PREVIOUS ROLLING 12 MONTHS	CHANGE
Altima Technology	793,651.69	150.00	793,501.69	-100% <span style="color:red">⬇️</span>
Norman Inc	61,537.47	49,029.86	12,507.62	292% <span style="color:green">⬆️</span>
Eldbolaget AB	22,720.08	10,143.68	12,576.41	-19% <span style="color:red">⬇️</span>
Svensk Säkerhetstjänst AB	21,405.53	8,172.48	13,233.06	-38% <span style="color:red">⬇️</span>
Svenska Integrationer AB	3,164.43	1,851.13	1,313.30	41% <span style="color:green">⬆️</span>

SALES BY SALES REP				
Indicator	Period	Current	Previous	Change
Sales	This Fiscal Year vs Last Fiscal Year	31,319.00	20,067.00	56% <span style="color:green">⬆️</span>
Unbilled Sales Orders	This Fiscal Year	11,006.70		
Open Estimates (Weighted)	This Fiscal Year	1,100.67		
Open opportunities (Weighted)	This Fiscal Year	2,601.58		
Forecast vs Actual	Forecast This Fiscal Year vs Sales Last Fiscal Year	46,027.95	20,067.00	129% <span style="color:green">⬆️</span>

COMPANY TOP 5 SALES REPS - ROLLING 12 MONTHS



TOP 5 ITEM - ROLLING 12 MONTHS



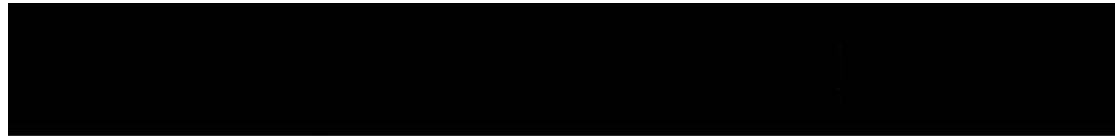
ACTIVITIES BY SALES REP				
Indicator	Period	Current	Previous	Change
Completed Phone calls	This Fiscal Year vs Last Fiscal Year	2	4	-50.00% <span style="color:red">⬇️</span>
Completed Events	This Fiscal Year vs Last Fiscal Year	9	0	N/A <span style="color:green">⬆️</span>
Total nr of Activities	This Fiscal Year vs Last Fiscal Year	11	4	175.00% <span style="color:green">⬆️</span>

LEAD CONVERSION RATE				
Indicator	Period	Current	Previous	Change
Lead Conversion	This Fiscal Year vs Last Fiscal Year	1	0	N/A <span style="color:green">⬆️</span>

Postal address:  
Solna Torg 3  
171 45 Solna  
Sweden



## Customer 360 Report



Customer 360°  
2016-10-03

Company Norman Inc  
Vat Reg Number SE5605406542  
Email finance@norman-inc.com  
Phone +46855554600

Payment Terms Net 30  
Collection Average 107 days  
Sales Rep Daniel Sernbo

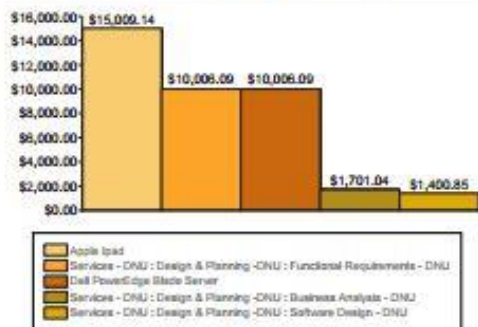
AGING OVERVIEW					
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	OVER 90 DAYS	TOTAL
47,854.02				12,882.84	60,536.86

SALES KEY PERFORMANCE INDICATOR				
Indicator	Period	Current	Previous	Change
Sales	This Fiscal Year vs Last Fiscal Year	39,224.00	10,006.00	292%
Unbilled Sales Orders	This Fiscal Year	12,007.31		
Open Estimates (Weighted)	This Fiscal Year	1,100.67		
Open opportunities (Weighted)	This Fiscal Year	2,601.58		
Forecast vs Actual	Forecast This Fiscal Year vs Sales Last Fiscal Year	54,933.56	10,006.00	449%

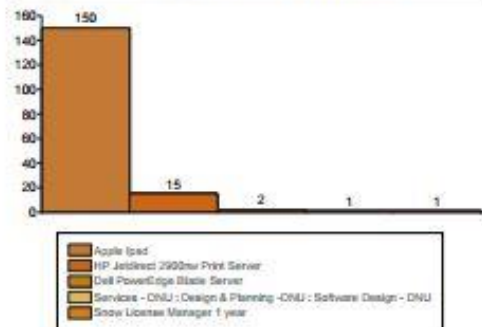
SERVICE KEY PERFORMANCE INDICATOR				
Indicator	Period	Current	Previous	Change
New Cases	This Fiscal Year vs Last Fiscal Year	3	0	N/A
Closed Cases	This Fiscal Year vs Last Fiscal Year	2	0	N/A
Case Closing Ratio	This Fiscal Year and Last Fiscal Year	67%	N/A	

ACTIVITIES KEY PERFORMANCE INDICATOR				
Indicator	Period	Current	Previous	Change
Completed Phone Calls	This Fiscal Year vs Last Fiscal Year	2	1	100%
Completed Events	This Fiscal Year vs Last Fiscal Year	2	1	100%
Total nr of Activities	This Fiscal Year vs Last Fiscal Year	4	2	100%

TOP 5 ITEMS BY VALUE - ROLLING 12 MONTHS



TOP 5 ITEMS BY QUANTITY - ROLLING 12 MONTHS



DEFAULT BILLING  
Norman Inc  
Drottninggatan 78  
Stockholm 16100  
Sweden

DEFAULT SHIPPING  
Norman Inc  
Kungälvsgatan 7  
12345 Solna  
Sweden



## Support Report Report

### Support Report

05/12/2016

Company	Norman Inc	Billing Address
Invoice Email	finance@norman-inc.com	Norman Inc
Phone	+46585554600	Drottninggatan 78
Our Salesrep	Daniel Sernbo	Stockholm 16100 Sweden

Total Number of Cases Last Month
3

Type	Number of Cases
Concern	2
Question	1

Case	Date	Subject	Contact	Assigned
2556	4/25/2016	Password Incorrect	Sandra Jonsson	Daniel Sernbo
2557	4/29/2016	Need help with saved search	Billy Billsson	Daniel Sernbo
2558	4/28/2016	Need new fields on customer record	Sandra Jonsson	Daniel Sernbo

These are your monthly cases

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Postal address:  
Solna Torg 3  
171 45 Solna, Sweden

## Customer Statement Report

### Statement

05/12/2016

**CUSTOMER** Norman Inc  
**CURRENCY** SEK  
**VAT REG NUMBER** SE5605406542  
**TERMS** Net 30

**BILL TO** Norman Inc  
Drottninggatan 78  
Stockholm 16100  
Sweden

TRANSACTION OVERVIEW					
<b>BALANCE</b>	5,000.00	<b>OVERDUE BALANCE</b>	3,750.00	<b>DAYS OVERDUE</b>	31

AGING OVERVIEW				
<b>CURRENT</b>	<b>1-30 DAYS</b>	<b>31-60 DAYS</b>	<b>61-90 DAYS</b>	<b>OVER 90 DAYS</b>
500.31	375.23	125.08		

TRANSACTIONS SUMMARY							
TYPE	#	DATE	DUE DATE	AMOUNT	REMAINING	STATUS	Memo
Invoice	0786	5/2/2016	6/1/2016	125.08	125.08	Open	
Invoice	0785	4/18/2016	5/2/2016	250.15	250.15	Open	
Invoice	0784	4/1/2016	4/11/2016	125.08	125.08	Open	

TRANSACTIONS DETAILS						
Number	Item	ItemRate	Quantity	Amount	Tax	Memo
0786	HP Jetdirect 2900nw Print Server		5	100.06		
0785	HP Jetdirect 2900nw Print Server		10	200.12		
0784	HP Jetdirect 2900nw Print Server		5	100.06		

## Vendor Statement Report

### Vendor Statement

05/12/2016

**VENDOR** Maybelline New York  
**CURRENCY** USD  
**VAT REG NUMBER**  
**TERMS**

**BILL TO** Maybelline New York  
 575 5th Ave  
 NY 10017  
 USA

TRANSACTION OVERVIEW					
<b>BALANCE</b>	921.40	<b>OVERDUE BALANCE</b>		<b>DAYS OVERDUE</b>	

AGING OVERVIEW				
<b>CURRENT</b>	<b>1-30 DAYS</b>	<b>31-60 DAYS</b>	<b>61-90 DAYS</b>	<b>OVER 90 DAYS</b>
921.40				921.40

TRANSACTIONS SUMMARY							
TYPE	#	DATE	DUE DATE	AMOUNT	REMAINING	STATUS	Memo
Bill	9012	4/5/2015	4/5/2015	140.00	140.00	Open	
Bill	9017	4/3/2015	4/3/2015	190.00	190.00	Open	
Bill	9032	4/3/2015	4/3/2015	340.00	340.00	Open	
Bill	9022	4/2/2015	4/2/2015	240.00	240.00	Open	
Bill	105	12/11/2014	12/11/2014	5.45	5.45	Open	
Bill	110	12/11/2014	12/11/2014	5.95	5.95	Open	

Item Datasheet Report

Item Datasheet

05/12/2016  
Price is valid for 30 days

ITEM NAME/NUMBER	UNITS	MIN. QUANTITY	ITEM WEIGHT
HP Jetdirect 2900nw Print Server	Each	5	1.5 kg

SALES DESCRIPTION

Extend your wireless printing reach with ease  
Set up convenient mobile printing on your printer or MFP in a few easy steps.<sup>1,2</sup>  
Users simply select a printer or MFP from their mobile devices to tackle tasks from anywhere in the office.<sup>1</sup>  
Save users time and steps—send print jobs from most mobile devices that use a 2.4 GHz or 5 GHz bandwidth.<sup>1</sup>



Currency	Unitprice
USD	280.00
SEK	3000.00
AUD	280.00

## Project Status Report

## Project Status Report

2016-05-12

### Primary information

Project name	Financial system deployment		
Client	Altima Technology	Status	On Hold
Project manager	Caroline Norman	Comment	Comment here....
Language	English (U.S.)		
Primary currency	USD		

### Project Overview

Scheduled start date	02/18/2015	Estimated work	588
Actual start date	02/18/2015	Actual work	540
Calculated end date	5/20/2015	Remaining work	48

### Resources

Resource	Resource Role
Ed Sullivan	Consultant
Scott Torman	Consultant
Tracie Windbourne	Consultant
__ Business Analyst	Consultant
__ Project Manager	Consultant
__ Consultant	Consultant
__ Trainer	Consultant
Magnus Jonsson	Consultant

### Project Progress

Project task	Estimated (h)	Actual (h)	Remaining (h)	Start date	End date	% Complete
Deployment	588	540	48	2/18/2015	5/20/2015	91.8%
Deployment : Initiate	46	46	0	2/18/2015	2/22/2015	100.0%
Deployment : Initiate : Review SOW	2	2	0	2/18/2015	2/18/2015	100.0%
Deployment : Initiate : Plan deployment	12	12	0	2/18/2015	2/18/2015	100.0%
Deployment : Initiate : Alignment workshop	32	32	0	2/18/2015	2/22/2015	100.0%



**Marketing Campaign Report**

**Campaign Information**

2016-05-12

Campaign	Focused Customer Launch	Category	Events
Start date	02/16/2015	End Date	
Manager	Magnus Jonsson	Promotion Code	

**Campaign Schedule**

Channel	Event	Schedule on	Status	Promotioncode
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