

## Sales Reporting from JOBZ!

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JOBZ! makes it easy to know what's really going on with your business.

For example, one click produces **The Pipeline**, a concise summary of jobs that are sales or likely sales from the current month forward.

*Sales* are those jobs that are in Working, Shipped or Billed status. *Likely* sales are jobs in Pending status that are checked "yes," a likely sale.

Most of the information required to produce this report has already been entered, such as the job title and quote amount. Some of it is automatically entered by JOBZ!, such as the status change to Pending when you click on the Proposal button, or to Working when you print the Sales Order to Production. If your anticipated billing date passes by, the software will flag you to adjust it when you run your daily organizational job sorts.

Management Tactic: Ask each of your reps to see you once a week with their Pipeline report in hand, as a way to spark a conversation. If the Pipeline is running dry, run their **Quote Activity** report, which lists all jobs quoted over any time period you specify. If that still leaves a bit to be desired, run the **Recent Contacts** report from their Address database, and see who they have been calling on.

Though being high bidder does not always lose the order, if you do lose a job and you know what it went for, and perhaps to whom, those two data points will drive a **Lost Jobs** report that can highlight pricing trends among your competition.

Other reports illustrated on the following pages include:

### **Current Month's Sales**

All jobs with an invoice date in the current month, in any status: Working, Shipped or Billed.

### **Sales Forecast**

All jobs in Pending status, with an invoice date in the future, and the Likely Sale button clicked Yes.

### **Quote Activity**

All jobs filtered by any criteria you specify, sorted by customer, showing jobs quoted vs. sales made.

### **In Production**

Jobs in the status Working, optionally filtered by criteria such as customer name or project title.

### **Account List**

Summarized in this case by type of company, and sales rep. The example here is just one of many different views of the data, and includes sales budget totals.

Many more reports are available, including:

**Billed Sales**- any time period, sales rep, customer etc., **Sales Budgeting**, detailed and summary views, month by month, press by press, etc. **Booked Sales**, by region, office, plant, rep etc. **Expenses** by general ledger categories. **Housekeeping** reports that find jobs that need adjustment to either their date or status. **Upcoming Appointments**, showing result of last contact, reason for next contact, etc.

Most of the reports are available to sales reps as well as managers. When a manager runs a report it may contain a single sales rep's data or the entire group's, summarized by sales rep. When a sales rep runs a report, only his own data is returned. This enables a high degree of *sales self-management*, one of the basic principles of JOBZ!



# Pipeline

January 9, 2008

Sale

## January

### Eric Clapton

|                      |          |
|----------------------|----------|
| 2 Pending            | \$38,933 |
| 3 Working            | \$39,647 |
| January Eric Clapton | \$78,580 |

### Jim Taylor

|                    |           |
|--------------------|-----------|
| 5 Pending          | \$83,234  |
| 5 Working          | \$639,314 |
| January Jim Taylor | \$722,548 |

### Jimmy Buffett

|                       |          |
|-----------------------|----------|
| 3 Pending             | \$30,485 |
| 2 Working             | \$35,768 |
| January Jimmy Buffett | \$66,253 |

**January 2008 Total** **\$867,381**

**Grand Total** **\$867,381**



# Pipeline

January 9, 2008

|                                                                 |                                    | Invoice Date | Sale             |
|-----------------------------------------------------------------|------------------------------------|--------------|------------------|
| <b>January</b>                                                  |                                    |              |                  |
| Claymore Information Systems - Heidelberg Uncertainty Principle | Pending 75%                        | 1/10/08      | \$15,995         |
| Cursory Software - File Edit View Magazine                      | Pending 50%                        | 1/21/08      | \$22,939         |
|                                                                 | January Eric Clapton Pending       |              | \$38,933         |
| Synthesystems - 8 pages self cover                              | 121312 Working                     | 1/16/08      | \$12,345         |
| File Edit View, Inc - Cosmic Horizon                            | 9993959 Working                    | 1/16/08      | \$1,477          |
| Cursory Software - Axon Brochure One                            | 5642297 Working                    | 1/18/08      | \$25,825         |
|                                                                 | January Eric Clapton Working       |              | \$39,647         |
|                                                                 | <b>January Eric Clapton Total</b>  |              | <b>\$78,580</b>  |
| Database Testing, Inc - JOBZ Printing Sales Panoply             | Pending 25%                        | 1/10/08      | \$4,750          |
| Database Testing, Inc - Rest of the Story                       | Pending 75%                        | 1/10/08      | \$7,499          |
| Done That - JOBZ! Demonstration Brochure                        | Pending 50%                        | 1/11/08      | \$61,728         |
| Database Testing, Inc - Loop 28 Corporate Newsletter            | Pending 25%                        | 1/18/08      | \$4,257          |
| Database Testing, Inc - Time Trials                             | Pending 100%                       | 1/24/08      | \$5,000          |
|                                                                 | January Jim Taylor Pending         |              | \$83,234         |
| Mindfire Solutions - JOBZ Worx                                  | 999342 Working                     | 1/14/08      | \$19,984         |
| Database Testing, Inc - JOBZ Sellz                              | 999344 Working                     | 1/14/08      | \$289,313        |
| Database Testing, Inc - Peto Punctum                            | 999344 Working                     | 1/14/08      | \$289,313        |
| Client, Inc - Cosmic Horizon Brochure                           | 999343 Working                     | 1/16/08      | \$23,641         |
| Client, Inc - Helioseismology Brochure                          | 999345 Working                     | 1/16/08      | \$17,063         |
|                                                                 | January Jim Taylor Working         |              | \$639,314        |
|                                                                 | <b>January Jim Taylor Total</b>    |              | <b>\$722,548</b> |
| Database Testing, Inc - Heidelberg Service Brochure             | Pending 75%                        | 1/21/08      | \$13,250         |
| The Block Design Group - Printing Sales Brochure                | Pending 25%                        | 1/21/08      | \$5,564          |
| Buffalo Rome - Supersymmetry Brochure                           | Pending 75%                        | 1/22/08      | \$11,672         |
|                                                                 | January Jimmy Buffett Pending      |              | \$30,485         |
| Buffalo Rome - Spacetime Utopia                                 | 867567 Working                     | 1/16/08      | \$15,678         |
| The Block Design Group - Punctum                                | 7464532 Working                    | 1/17/08      | \$20,090         |
|                                                                 | January Jimmy Buffett Working      |              | \$35,768         |
|                                                                 | <b>January Jimmy Buffett Total</b> |              | <b>\$66,253</b>  |
|                                                                 | <b>January 2008 Total</b>          |              | <b>\$867,381</b> |



## Current Sales For January 2006

As of: January 3

|                                                              | Job #  | Status  | Invoice | Sale         | Sell%            |
|--------------------------------------------------------------|--------|---------|---------|--------------|------------------|
| <b>Eric Clapton</b>                                          |        |         |         |              |                  |
| Claymore Information Systems - Standard Candle Brochure      | 12417  | Working | 1/31    | 21,358       | 88.0%            |
| Claymore Information Systems - Uncertainty Principle         | 12349  | Working | 1/31    | 23,971       | 92.0%            |
| Clan Tech, Inc - Special Relativity Brochure                 | 12376d | Working | 1/31    | 29,403       | 100.0%           |
| Clan Tech, Inc - MAN Roland Catalog                          | 25489  | Billed  | 1/12    | 24,562       | 107.5%           |
| Clan Tech, Inc - Western Australia Brochure                  | 12360  | Shipped | 1/20    | 42,197       | 110.0%           |
| Cursory Software - Wavefunction Brochure                     | 12384  | Working | 1/31    | 32,317       | 100.0%           |
| Clan Tech, Inc - Superstring Report                          | 24533  | Working | 1/31    | 25,482       | 87.0%            |
| Clan Tech, Inc - JOBZ Worx                                   | 44444  | Shipped | 1/8     | 21,984       | 92.3%            |
| Claymore Information Systems - Radio Control Special Section | 51720  | Shipped | 1/9     | 38,046       | 110.0%           |
| Cursory Software - Axon Brochure One                         | 11404  | Billed  | 1/19    | 25,825       | 87.5%            |
|                                                              |        |         |         | 285,145      | 99.1%            |
| <b>Jerry Garcia</b>                                          |        |         |         |              |                  |
| Federal Motors - General Relativity                          | 12350  | Billed  | 1/26    | 30,163       | 100.0%           |
| Federal Motors - Time Arrow Brochure                         |        | Working | 1/31    | 19,299       | 90.0%            |
| Federal Motors - Dark Matter Brochure                        | 665    | Billed  | 1/26    | 14,745       | 100.0%           |
| Eleven, Inc - Nevada Brochure                                | 12380  | Shipped | 1/22    | 26,705       | 99.5%            |
|                                                              |        |         |         | 90,912       | 97.6%            |
| <b>Jim Taylor</b>                                            |        |         |         |              |                  |
| Database Testing, Inc - Seize the Digital Data Catalog       | A1092  | Working | 1/31    | 97,418       | 90.0%            |
| The Block Design Group - Gluon Brochure                      | 12401b | Working | 1/31    | 28,882       | 97.5%            |
| The Block Design Group - 2.7 Kelvin Magazine                 | 12389  | Working | 1/31    | 36,158       | 99.0%            |
| Database Testing, Inc - Graviton Program                     | 35687  | Shipped | 1/7     | 22,256       | 110.0%           |
| Client, Inc - JOBZ Sellz                                     | 33333  | Shipped | 1/10    | 294,463      | 93.3%            |
|                                                              |        |         |         | 479,177      | 94.1%            |
| <b>Jimmy Buffett</b>                                         |        |         |         |              |                  |
| Buffalo Rome - Polynesian Programs                           | 12397  | Shipped | 1/20    | 33,668       | 96.0%            |
| Garden Supply - Kansas Brochure                              | 12378  | Shipped | 1/20    | 24,802       | 97.5%            |
| Arrowspace - Oklahoma Brochure                               | 12383  | Shipped | 1/21    | 25,318       | 100.0%           |
| Bell Labs - Axon Brochure Two                                | 11244  | Billed  | 1/19    | 25,825       | 87.5%            |
|                                                              |        |         |         | 109,613      | 95.2%            |
|                                                              |        |         |         | <b>Total</b> | <b>\$964,846</b> |
|                                                              |        |         |         |              | <b>95.9%</b>     |



# Sales Forecast

January 3, 2006

|                                                    | Press      | Invoice               | Quote            |
|----------------------------------------------------|------------|-----------------------|------------------|
| <b>February</b>                                    |            |                       |                  |
| Clan Tech, Inc - Big Bang Booklet                  | 1/18 S NY  | 2/3                   | \$17,666         |
| Clan Tech, Inc - Event Horizon Brochure            | 1/20 S SF  | 2/5                   | \$12,345         |
| Cursory Software - Dark Energy Brochure            | 1/21 S LA  | 2/6                   | \$20,456         |
| Clan Tech, Inc - Chief Brochure                    | 1/21 S NY  | 2/6                   | \$17,607         |
| Claymore Information Systems - JOBZ Rulez Brochure | 1/29 S LA  | 2/6                   | \$17,151         |
| Clan Tech, Inc - JOBZ                              | 1/25 S LA  | 2/10                  | \$25,695         |
|                                                    |            | <b>Eric Clapton</b>   | <b>\$110,920</b> |
| Federal Motors - Supersymmetry Brochure            | 1/13 S LA  | 2/1                   | \$18,596         |
| Eleven, Inc - Supernova Brochure                   | 1/14 S SF  | 2/1                   | \$11,415         |
| Eleven, Inc - Mars Lander Brochure                 | 1/17 S LA  | 2/2                   | \$21,534         |
|                                                    |            | <b>Jerry Garcia</b>   | <b>\$51,545</b>  |
| Arrowspace - Google Brochure                       | 1/19 S LA  | 2/4                   | \$17,457         |
| Buffalo Rome - Mitsubishi Flyer, Version A         | 1/20 W NY  | 2/5                   | \$22,331         |
|                                                    |            | <b>Jimmy Buffett</b>  | <b>\$39,788</b>  |
|                                                    |            | <b>February Total</b> | <b>\$202,253</b> |
| <b>March</b>                                       |            |                       |                  |
| Cursory Software - JOBZ! Demonstration Brochure    | 1/31 W PDX | 3/1                   | \$120,620        |
|                                                    |            | <b>Eric Clapton</b>   | <b>\$120,620</b> |
| Knowhow - Quantum Entanglement Brochure            | 2/23 S LA  | 3/1                   | \$108,536        |
|                                                    |            | <b>Mark Knopfler</b>  | <b>\$108,536</b> |
|                                                    |            | <b>March Total</b>    | <b>\$229,156</b> |
|                                                    |            | <b>Grand Total</b>    | <b>\$431,409</b> |

## Quote Activity

Specify Quote Month or other Criteria, and Optionally Enter a Title Here

| Jobs                                                         | Quoted       | Est#         | Quotes           | M/U    | Status  |
|--------------------------------------------------------------|--------------|--------------|------------------|--------|---------|
| <b><u>Eric Clapton</u></b>                                   |              |              |                  |        |         |
| Claymore Information Systems - Optional Brochure             | 1/1/07       | 32457        | \$15,746         | 82.5%  | Shipped |
| Claymore Information Systems - Seize the Seps Brochure       | 1/2/07       | 234585       | \$108,000        | 200.0% | Working |
| Clan Tech, Inc - JOBZ Worx                                   | 1/5/07       | 3215487      | \$17,151         | 92.3%  | Shipped |
| Claymore Information Systems - Radio Control Special Section | 1/6/07       | A12452       | \$31,352         | 110.0% | Shipped |
| Clan Tech, Inc - Zymurgy Study                               | 1/11/07      | 234580       | \$18,536         | 90.0%  | Shipped |
| Cursory Software - Manageering Brochure                      | 1/14/07      | 32476        | \$14,010         | 96.6%  | Working |
| Cursory Software - File Edit View Magazine                   | 1/15/07      | 12546        | \$45,877         | 100.0% | Working |
| Clan Tech, Inc - Western Australia Brochure                  | 1/17/07      | 97821        | \$21,356         | 110.0% | Shipped |
| The Block Design Group - Seize the Seps Brochure             | 1/21/07      | 234585       | \$55,800         | 100.0% | Working |
|                                                              |              | Sale 9       | \$327,828        |        |         |
| The Block Design Group - Seize the Seps Brochure             | 1/2/07       | 234585       | \$108,000        | 200.0% | Pending |
| Cursory Software - Air Car Brochure                          | 1/4/07       | 45669877     | \$18,596         | 100.0% | Dead    |
| Cursory Software - Dark Energy Brochure                      | 1/6/07       | 32461        | \$20,456         | 110.0% | Pending |
| Clan Tech, Inc - Big Bang Booklet                            | 1/7/07       | 32460        | \$17,666         | 95.0%  | Dead    |
| Claymore Information Systems - Calcutta Monastery Brochure   | 1/9/07       | 32474        | \$17,201         | 92.5%  | Pending |
| Clan Tech, Inc - Chief Brochure                              | 1/13/07      | 32466        | \$17,607         | 85.0%  | Pending |
| Claymore Information Systems - Goss Insert                   | 1/18/07      | 32475        | \$17,272         | 87.5%  | Pending |
| Claymore Information Systems - Baum Brochure                 | 1/20/07      | 32470        | \$18,164         | 88.0%  | Dead    |
| The Block Design Group - Seize the Seps Brochure             | 1/21/07      | 234585       | \$55,800         | 100.0% | Pending |
| Clan Tech, Inc - JOBZ Controls Printing                      | 1/30/07      | 3215487      | \$18,596         | 100.0% | Dead    |
|                                                              |              | No Sale 10   | \$309,358        |        |         |
|                                                              | Total # Jobs | 19           | \$637,186        |        |         |
|                                                              |              | <b>Total</b> | <b>\$637,186</b> |        |         |

*Jobs = Number of database records. Quotes = Price for Qty. 1*

*Sale = Job status is Working, Shipped or Billed. No Sale = Job status is In Estimating, Pending or Dead*

## Lost Job Competition Report

Date: 10/18/2006

Re: **File Edit View**  
**Annual Photo Catalog**

|                                             |                              |
|---------------------------------------------|------------------------------|
| Estimate <b>234570</b>                      | Quoted Date <b>10/7/2006</b> |
| Estimator <b>Patsi Cline</b>                | Press Date <b>12/19/2006</b> |
| Sales Rep <b>Jim Taylor</b>                 | Invoice Month <b>January</b> |
| Lost To <b>Nemesis Printing</b>             | Press/Plant <b>SF</b>        |
| Their Quote, Qty 1 <b>\$10,000 = 81.00%</b> | <b>LA</b>                    |
| We went in at <b>90.0%</b>                  |                              |
| Comment <b>These guys are killing me!</b>   |                              |

|                   | Our Quote     | Winning Quote   |                     |
|-------------------|---------------|-----------------|---------------------|
| Quantity          | <b>45,000</b> |                 |                     |
| Total COST        | 12,345        |                 |                     |
| - Material        | 4,500         |                 |                     |
| -Outside Services | 2,150         |                 |                     |
| Add'l Ms:         | 274.33        |                 |                     |
| <b>M/U %</b>      | <b>90.0%</b>  | <b>81.00%</b>   | (Of our Total COST) |
| = Base            | 11,111        |                 |                     |
| Estimate VA 46%   | 5,695         |                 |                     |
| - VA Change       | <b>-1,234</b> |                 |                     |
| = Selling VA 40%  | 4,461         |                 |                     |
| + Add-On          |               |                 |                     |
| <b>= QUOTE</b>    | <b>11,111</b> | <b>\$10,000</b> |                     |

# Lost Jobs Report

March 22, 2006

Invoice Dates: 4/11/06 to 5/13/06

| Jobs Reported as Lost                                | Billing                                             | Press | Our Quote        | @      | Lost To          | Their Quote | @   |
|------------------------------------------------------|-----------------------------------------------------|-------|------------------|--------|------------------|-------------|-----|
| <b>Eric Clapton</b>                                  |                                                     |       |                  |        |                  |             |     |
| Claymore Information Systems - Goss Insert           | April                                               | W     | \$17,272         | 87.5%  | Badco Printing   | \$14,500    | 78% |
|                                                      | <i>Keep notes to yourself about a job.</i>          |       |                  |        |                  |             |     |
| Claymore Information Systems - Baum Brochure         | April                                               | S     | \$18,164         | 88.0%  | Ink Scum Bags    | \$12,580    | 68% |
|                                                      | <i>We can't compete here</i>                        |       |                  |        |                  |             |     |
| Clan Tech, Inc - Event Horizon Brochure              | May                                                 | S     | \$12,345         | 100.0% | Nemesis Printing | \$11,500    | 93% |
|                                                      | <i>Should have had this one!</i>                    |       |                  |        |                  |             |     |
| <b>Jim Taylor</b>                                    |                                                     |       |                  |        |                  |             |     |
| Database Testing, Inc - Black Hole Brochure          | April                                               | S     | \$16,877         | 80.0%  | Down and Dirty   | \$14,000    | 75% |
|                                                      | <i>We need to look at our prepress pricing here</i> |       |                  |        |                  |             |     |
| Database Testing, Inc - Intercompany Brochure        | April                                               | W     | \$14,877         | 80.0%  | Nemesis Printing | \$13,852    | 74% |
|                                                      | <i>Why is our paper so expensive?</i>               |       |                  |        |                  |             |     |
| Claymore Information Systems - Uncertainty Principle | May                                                 | S     | \$18,235         | 92.0%  | Nemesis Printing | \$18,750    | 95% |
|                                                      | <i>Lost this one because of the schedule</i>        |       |                  |        |                  |             |     |
| Client, Inc - Crustacean Shores Generic Brochure     | May                                                 | S     | \$21,534         | 110.0% | Nemesis Printers | \$18,750    | 96% |
|                                                      | <i>We were a little over-confident</i>              |       |                  |        |                  |             |     |
| File Edit View - Annual Photo Catalog                | May                                                 |       | \$12,345         | 100.0% | Nemesis Printing | \$10,000    | 81% |
|                                                      | <i>No comment. 81%???</i>                           |       |                  |        |                  |             |     |
| <b>Jerry Garcia</b>                                  |                                                     |       |                  |        |                  |             |     |
| Eleven, Inc - Xeikon Brochure                        | April                                               | W     | \$18,536         | 90.0%  | Whozits Printing | \$15,245    | 82% |
| Eleven, Inc - AirPort Brochure                       | April                                               | S     | \$17,681         | 89.7%  | Cheapo Printing  | \$14,500    | 78% |
|                                                      | <i>Not these guys again!</i>                        |       |                  |        |                  |             |     |
| Eleven, Inc - Facilitate Flyer                       | April                                               | S     | \$18,536         | 90.0%  | Nemesis Printing | \$14,000    | 75% |
|                                                      | <i>I give up here- too price conscious</i>          |       |                  |        |                  |             |     |
| Federal Motors - Hamada Data Sheet                   | April                                               | S     | \$15,342         | 82.5%  | Nemesis Printing | \$13,500    | 73% |
|                                                      | <i>But I don't believe her about their \$</i>       |       |                  |        |                  |             |     |
| Federal Motors - AB Dick Brochure                    | April                                               | S     | \$17,142         | 82.5%  | Whozits Printing | \$14,258    | 77% |
|                                                      | <i>I saw their quote myself- same specs</i>         |       |                  |        |                  |             |     |
| <b>Jimi Hendrix</b>                                  |                                                     |       |                  |        |                  |             |     |
| Database Testing, Inc - Monster Brochure No Scans    | May                                                 | S     | \$16,736         | 90.0%  | Nemesis Printing | \$16,700    | 90% |
|                                                      | <i>We'll get the next one</i>                       |       |                  |        |                  |             |     |
|                                                      | <b>Total</b>                                        |       | <b>\$235,622</b> |        |                  |             |     |

## In Production

November 17, 2005

| <b>Job No.</b>                                                                                                                                                                                                                          | <b>Company, Title</b>                                     | <b>Files</b> | <b>Proof</b> | <b>Press</b> | <b>Ship</b> | <b>Deliver Part</b> | <b>Bal</b>                                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|--------------|--------------|--------------|-------------|---------------------|-----------------------------------------------|
| 47854                                                                                                                                                                                                                                   | <b>Claymore Information Systems</b> Spacetime             | 11/17        | 11/21        | 11/24        | 11/26       |                     | 12/4                                          |
| <p><i>This is the area where you can make notes about the job's status, or other important info. Schedule notes appear in many places- schedule requests, schedules sent to customers, "in Production" lists and confirmations.</i></p> |                                                           |              |              |              |             |                     |                                               |
| 24533                                                                                                                                                                                                                                   | <b>Database Testing, Inc.</b> Superstring Report          | 11/30        | 12/4         | 12/7         | 12/9        |                     | 12/17                                         |
|                                                                                                                                                                                                                                         |                                                           |              |              |              |             |                     | <p><i>Need:<br/>Mail List<br/>Postage</i></p> |
| <p><i>The headings buttons on the "In Production" report cause the jobs in production to be sorted by that field. So you can check what jobs are due-in color, or next out proof, etc. This list is sorted by On Press date.</i></p>    |                                                           |              |              |              |             |                     |                                               |
| 12417                                                                                                                                                                                                                                   | <b>The Block Design Group</b> Standard Candle Brochure    | 12/5         | 12/9         | 12/12        | 12/14       |                     | 12/22                                         |
|                                                                                                                                                                                                                                         |                                                           |              |              |              |             |                     | <p><i>Need:<br/>Ship Info</i></p>             |
| <p><i>Schedule notes here. Anything about the schedule that need to be communicated in writing to all the players</i></p>                                                                                                               |                                                           |              |              |              |             |                     |                                               |
| 12349                                                                                                                                                                                                                                   | <b>Claymore Information Systems</b> Uncertainty Principle | 12/9         | 12/13        | 12/16        | 12/18       |                     | 12/26                                         |
|                                                                                                                                                                                                                                         |                                                           |              |              |              |             |                     | <p><i>Need:<br/>Mail List</i></p>             |
| <p><i>These notes go to the print planner and the customer in various different formats</i></p>                                                                                                                                         |                                                           |              |              |              |             |                     |                                               |
| 64587                                                                                                                                                                                                                                   | <b>Microtech</b> Manageering Brochure                     | 12/16        | 12/20        | 12/23        | 12/25       |                     | 1/2                                           |
|                                                                                                                                                                                                                                         |                                                           |              |              |              |             |                     | <p><i>Need:<br/>Ship Info</i></p>             |
| <p><i>The "In Production" list can also be printed out showing a single customer's jobs, so you can keep them informed of a large multi-job project.</i></p>                                                                            |                                                           |              |              |              |             |                     |                                               |
| 12355                                                                                                                                                                                                                                   | <b>Database Testing, Inc.</b> Zymurgy Study               | 1/1          | 1/5          | 1/8          | 1/10        |                     | 1/18                                          |
| <p><i>Special instructions regarding delivery dates, or versions, etc.</i></p>                                                                                                                                                          |                                                           |              |              |              |             |                     |                                               |
| 45787                                                                                                                                                                                                                                   | <b>Claymore Information Systems</b> Spin Brochure         | 1/1          | 1/5          | 1/8          | 1/10        |                     | 1/18                                          |
|                                                                                                                                                                                                                                         |                                                           |              |              |              |             |                     | <p><i>Need:<br/>Proofs Back</i></p>           |
| <p><i>The jobs that appear on this list are Working jobs, but you can refine that to a subset.</i></p>                                                                                                                                  |                                                           |              |              |              |             |                     |                                               |
| 12376d                                                                                                                                                                                                                                  | <b>Two, Inc.</b> Special Relativity Brochure              | 1/2          | 1/6          | 1/9          | 1/11        |                     | 1/19                                          |
| <p><i>Say it once, keep everyone up to date.</i></p>                                                                                                                                                                                    |                                                           |              |              |              |             |                     |                                               |
| 12384                                                                                                                                                                                                                                   | <b>Claris</b> Wavefunction Brochure                       | 1/2          | 1/6          | 1/9          | 1/11        |                     | 1/19                                          |
| <p><i>Print this list for your customer when you have a lot of jobs going on, or hand it to your manager before you go on vacation.</i></p>                                                                                             |                                                           |              |              |              |             |                     |                                               |
| 12351                                                                                                                                                                                                                                   | <b>Claris</b> File Edit View Magazine                     | 1/3          | 1/7          | 1/10         | 1/12        |                     | 1/20                                          |
| <p><i>Schedule notes appear in many places- schedule requests, schedules sent to customers, "in Production" lists and confirmations.</i></p>                                                                                            |                                                           |              |              |              |             |                     |                                               |

# Accounts and Prospects

By Type of Company, Sorted by Sales Rep

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|                              |                    |
|------------------------------|--------------------|
| <b>Advertising Agency</b>    | <b>\$507,500</b>   |
| <i>Eric Clapton</i>          |                    |
| Operamatica                  | \$185,000          |
| The Block Design Group       | \$322,500          |
| <b>Computer Manufacturer</b> | <b>\$467,500</b>   |
| <i>Eric Clapton</i>          |                    |
| Synthesystems                | \$210,000          |
| <i>Jimmy Buffett</i>         |                    |
| Bell Labs                    | \$257,500          |
| <b>Financial/Insurance</b>   | <b>\$1,000,000</b> |
| <i>Eric Clapton</i>          |                    |
| Arrowspace                   | \$110,000          |
| Clan Tech, Inc.              | \$197,500          |
| Manticore                    | \$147,500          |
| Useless Gadgets              | \$235,000          |
| <i>Jimmy Buffett</i>         |                    |
| Arrowspace                   | \$310,000          |
| <b>Retail</b>                | <b>\$395,000</b>   |
| <i>Jimmy Buffett</i>         |                    |
| Buffalo Rome                 | \$222,500          |
| Garden Supply                | \$172,500          |
| <b>Service</b>               | <b>\$347,500</b>   |
| <i>Eric Clapton</i>          |                    |
| Modern Temporary Services    | \$347,500          |
| <b>Software</b>              | <b>\$1,610,000</b> |
| <i>Eric Clapton</i>          |                    |
| Claymore Information Systems | \$817,500          |
| Cursory Software             | \$297,500          |
| Microtech                    | \$160,000          |
| <i>Jimmy Buffett</i>         |                    |
| Client, Inc.                 | \$335,000          |
| <b>Travel</b>                | <b>\$247,500</b>   |
| <i>Eric Clapton</i>          |                    |
| Two, Inc.                    | \$247,500          |
|                              | <hr/>              |
|                              | \$4,575,000        |

Invoice Dates:  
3/31/07 to 3/10/08

Report Date: 3/31/08

## Sales By Company

| Customer                            | Orders    | Average Sale    | Sell%         | Amount             |
|-------------------------------------|-----------|-----------------|---------------|--------------------|
| <b>Sometronics, Inc.</b>            | 7         | \$35,570        | 102.3%        | \$248,987          |
| <b>Knowhow</b>                      | 6         | \$34,618        | 109.3%        | \$207,706          |
| <b>Database Testing, Inc.</b>       | 7         | \$28,907        | 98.6%         | \$202,346          |
| <b>Eleven, Inc.</b>                 | 6         | \$32,817        | 108.9%        | \$196,901          |
| <b>Cursory Software</b>             | 6         | \$29,739        | 100.0%        | \$178,436          |
| <b>Arrowspace</b>                   | 5         | \$33,571        | 97.8%         | \$167,857          |
| <b>File Edit View, Inc.</b>         | 5         | \$29,919        | 98.1%         | \$149,596          |
| <b>Claymore Information Systems</b> | 2         | \$70,795        | 181.3%        | \$141,589          |
| <b>The Block Design Group</b>       | 4         | \$19,274        | 97.2%         | \$77,096           |
| <b>Bell Labs</b>                    | 2         | \$31,122        | 87.5%         | \$62,243           |
| <b>Manticore</b>                    | 2         | \$30,626        | 183.2%        | \$61,251           |
| <b>Buffalo Rome</b>                 | 2         | \$28,227        | 100.0%        | \$56,453           |
| <b>Clan Tech, Inc.</b>              | 2         | \$27,838        | 81.6%         | \$55,675           |
| <b>Operamatica</b>                  | 1         | \$32,150        | 100.0%        | \$32,150           |
| <b>Total</b>                        | <b>57</b> | <b>\$32,251</b> | <b>111.1%</b> | <b>\$1,838,284</b> |

Invoice Dates:  
3/31/07 to 3/10/08

Report Date: 3/31/08

## Sales By Contact

| Customer                                         | Orders    | Average Sale    | Sell%         | Amount             |
|--------------------------------------------------|-----------|-----------------|---------------|--------------------|
| <b>Sometronics, Inc.</b> Pat Pending             | 7         | \$35,570        | 102.3%        | \$248,987          |
| <b>Knowhow</b> Heywood Jabuzzoff                 | 6         | \$34,618        | 109.3%        | \$207,706          |
| <b>Eleven, Inc.</b> Lois Steem                   | 6         | \$32,817        | 108.9%        | \$196,901          |
| <b>Cursory Software</b> Megan Whoopie            | 6         | \$29,739        | 100.0%        | \$178,436          |
| <b>Arrowspace</b> Gladys Overwith                | 4         | \$35,611        | 97.3%         | \$142,444          |
| <b>Claymore Information Systems</b> Les Billings | 2         | \$70,795        | 181.3%        | \$141,589          |
| <b>Database Testing, Inc.</b> Rich Text          | 3         | \$35,446        | 100.8%        | \$106,337          |
| <b>File Edit View, Inc.</b> Hugh Saturation      | 2         | \$44,915        | 100.0%        | \$89,829           |
| <b>The Block Design Group</b> Ben Around         | 4         | \$19,274        | 97.2%         | \$77,096           |
| <b>Manticore</b> Kent Hoyt                       | 2         | \$30,626        | 183.2%        | \$61,251           |
| <b>File Edit View, Inc.</b> Yuri Dickulous       | 3         | \$19,922        | 94.8%         | \$59,767           |
| <b>Buffalo Rome</b> Allen Wrench                 | 2         | \$28,227        | 100.0%        | \$56,453           |
| <b>Clan Tech, Inc.</b> Don Dadudun               | 2         | \$27,838        | 81.6%         | \$55,675           |
| <b>Bell Labs</b> Tony Dyal                       | 1         | \$36,161        | 87.5%         | \$36,161           |
| <b>Database Testing, Inc.</b> Di Lux             | 1         | \$35,969        | 69.5%         | \$35,969           |
| <b>Operamatica</b> Barbara Seville               | 1         | \$32,150        | 100.0%        | \$32,150           |
| <b>Database Testing, Inc.</b> Al Payslo          | 1         | \$26,370        | 96.8%         | \$26,370           |
| <b>Bell Labs</b> Isabelle Ringing                | 1         | \$26,082        | 87.5%         | \$26,082           |
| <b>Arrowspace</b> Hugh Jorgan                    | 1         | \$25,413        | 100.0%        | \$25,413           |
| <b>Database Testing, Inc.</b> Lois Bidder        | 1         | \$23,670        | 96.8%         | \$23,670           |
| <b>Database Testing, Inc.</b> Serge Protector    | 1         | \$10,000        | 150.0%        | \$10,000           |
| <b>Total</b>                                     | <b>57</b> | <b>\$32,251</b> | <b>111.1%</b> | <b>\$1,838,284</b> |

Invoice Dates:  
3/31/07 to 3/10/08

Report Date: 3/31/08

## Sales By Product

| Product               | Orders    | Average Sale    | Sell%         | Amount             |
|-----------------------|-----------|-----------------|---------------|--------------------|
| <b>Brochures</b>      | 20        | \$37,513        | 116.6%        | \$750,250          |
| <b>Digital</b>        | 12        | \$34,836        | 101.1%        | \$418,030          |
| <b>Catalogs</b>       | 7         | \$27,893        | 99.6%         | \$195,251          |
| <b>Annual Reports</b> | 6         | \$30,536        | 106.4%        | \$183,213          |
| <b>Direct Mail</b>    | 7         | \$21,557        | 107.2%        | \$150,899          |
| <b>Books</b>          | 3         | \$30,415        | 156.7%        | \$91,246           |
| <b>Automotive</b>     | 1         | \$30,286        | 75.0%         | \$30,286           |
|                       | 1         | \$19,110        | 75.0%         | \$19,110           |
| <b>Total</b>          | <u>57</u> | <u>\$32,251</u> | <u>111.1%</u> | <u>\$1,838,284</u> |

# Recent Contacts Calendar

30 days prior to:  
December 15, 2005

|                                                                                                      | Last Contact                           | Next Contact                                            |
|------------------------------------------------------------------------------------------------------|----------------------------------------|---------------------------------------------------------|
| <b>Jim Taylor</b>                                                                                    |                                        |                                                         |
| <b>Thursday 12/1</b>                                                                                 |                                        |                                                         |
| <b>Client, Inc.</b>                                                                                  | Spoke<br>Encouraging                   | Thu, Dec 22<br>Check in<br>Big job in Feb. every year   |
| Roger That 408 395-8183 <i>Hot Prospect</i><br>18338 Las Cumbres Road #12 Los Gatos CA 95033         |                                        |                                                         |
| <b>Database Testing, Inc.</b>                                                                        | Left Voice Mail<br>Re: UV              | Thu, Dec 29<br>Follow up<br>Reason to follow up         |
| Noah Dia 408 395-8183 <i>Hot Prospect</i><br>18338 Las Cumbres Road Los Gatos CA 95033               |                                        |                                                         |
| <b>Client, Inc.</b>                                                                                  | Left Voice Mail<br>Re: Mailing         | Fri, Jan 13<br>Get meeting<br>Show UV samples           |
| Les Izmor 408 395-8183 <i>Warm Prospect</i><br>18338 Las Clienta Road Las Clienta CA 95033           |                                        |                                                         |
| <b>Friday 12/2</b>                                                                                   |                                        |                                                         |
| <b>Client, Inc.</b>                                                                                  | Saw<br>Blew me off                     | Fri, Dec 16<br>Follow up<br>Never give up               |
| Morris Less 408 395-8183 <i>Warm Prospect</i><br>18338 Las Cumbres Road Los Gatos CA 95033           |                                        |                                                         |
| <b>Client, Inc.</b>                                                                                  | Left Voice Mail<br>Re: UV ink on matte | Fri, Jan 13<br>Drop In Visit<br>with UV samples         |
| Donatello Nobatti 408 395-8183 <i>Warm Prospect</i><br>18338 Las Cumbres Road Los Gatos CA 95033     |                                        |                                                         |
| <b>Len's Photography</b>                                                                             | Saw<br>Somewhat interested             | Thu, Dec 22<br>Set up Lunch<br>Pedro's? (likes Mexican) |
| Len Scapon 408 395-8183 <i>Warm Prospect</i><br>18338 Las Cumbres Road Los Gatos CA 95033            |                                        |                                                         |
| <b>Monday 12/5</b>                                                                                   |                                        |                                                         |
| <b>Database Testing, Inc.</b>                                                                        | Spoke<br>Encouraging                   | Thu, Jan 5<br>Check in<br>Needs calendar!               |
| Lois Bidder 408 395-8183 <i>Account</i><br>123 Main Street Brentwood CA 90367                        |                                        |                                                         |
| <b>Database Testing, Inc.</b>                                                                        | Spoke<br>Very Interested               | Thu, Dec 22<br>Drop In Visit<br>Xmas wrap               |
| Serge Protector 408 395-8183 <i>Prospect</i><br>1740 Technology Dr. Suite 100 San Francisco CA 94080 |                                        |                                                         |
| <b>Database Testing, Inc.</b>                                                                        | Spoke<br>Very Interested               | Wed, Dec 28<br>Plant Tour                               |
| Rich Text 408 395-8183 <i>Prospect</i><br>18338 Las Cumbres Road Suite 101 Los Gatos CA 95033        |                                        |                                                         |
| <b>Tuesday 12/6</b>                                                                                  |                                        |                                                         |
| <b>Database Testing, Inc.</b>                                                                        | Spoke<br>Encouraging                   | Sun, Jan 15<br>Set up lunch<br>Buys sheetfed only       |
| Robin M. Blind 408 395-8183 <i>Account</i><br>18338 Las Cumbres Road Los Gatos CA 95033              |                                        |                                                         |