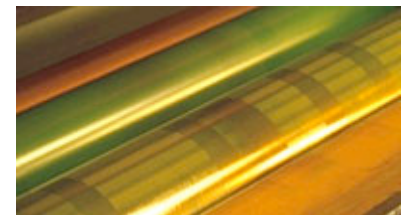


JOBZ!

Annual Sales Budgeting



As of Version 9.4.5, December 2009



ADDRESS Menu

- Start in LIST view

This will list the found set

This will list all your contacts

Jim Taylor
Saturday, December 12, 2009

INPUT LIST LIST OUTPUT EXPORT IMPORT MENU SHARK LIST
Hugh Saturation File Edit View, Inc. *Email Info*

NEW PERSON FIND... LIST ALL Modified Today Birthdays \$Plan

Scheduled Contacts	Contact Today	Next Contacts	Missed Contacts	Recent Contacts
Contact Name	Company	What		Next Contact
Hugh Saturation	File Edit View, Inc.	Plant Tour	+	12/10/09
Paige Turner	11 by Seventeen	Set up lunch	+	12/12/09
Lauren Order	Control Alt Delete	Lunch	+	12/12/09
Hugo First	A4 Graphics	Check in	+	12/12/09
Noah Dia	Database Testing, Inc.	Call	+	12/13/09
Gladys Overwith	A4 Graphics	Appointment	+	12/13/09
Lois Steem	Control Alt Delete	Call	+	12/13/09
Serge Protector	Abort Retry Ignore	Get meeting	+	12/13/09

FIND contacts by any number of criteria- it will take you to LIST view



ADDRESS LIST View

Find and sort your contacts

Date View is the default, and shows contact activity.

\$ View shows sales: Budgeted, Year to Date, Last Year and Trailing 12 Months

These buttons will find and list your contacts by category.

INPUT	COMPANY	OUTPUT	LIST	JOB	MEMO	MANAGER	HELP	Print	
Accounts	Prospects	Suspects	All Accounts & Prospects	Clear X	Find Select X	X All	ALL	FIND	NEW
Scheduled Contacts	Contact Today	Missed Next	Recent	Modified Today	Birthdays	Calendar	\$Plan	Export	
Segment View	Date View	\$ View	Company	Name	Next Contact	Last Contact			
File Edit View, Inc.	Hugh Saturation		+0 +1 +7	Thu 12/10	Plant Tour	Fri 10/16	Good Conversation		
11 by Seventeen	Paige Turner		+0 +1 +7	Sat 12/12	Set up lunch	Mon 10/19	Sent Proposal		
Control Alt Delete	Lauren Order		+0 +1 +7	Sat 12/12	Lunch	Sun 10/18	Mailing		
A4 Graphics	Hugo First		+0 +1 +7	Sat 12/12	Check in	Sun 10/11	Lunch		

INPUT	COMPANY	OUTPUT	LIST	JOB	MEMO	MANAGER	HELP	(Click here to omit contacts without eMail addresses.)				
Accounts	Prospects	Suspects	All Accounts & Prospects	Clear X	Find Select X	X All	ALL	FIND	NEW			
Scheduled Contacts	Contact Today	Missed Next	Recent	Modified Today	Birthdays	Calendar	\$Plan	Export 60 Records				
Segment View	Date View	\$ View	Company	Name	Select X	Category	Temp.	Sales Rep	Budget	YTD	Last Year	12 Months
File Edit View, Inc.	Hugh Saturation			Prospect	Hot	Jim Taylor			\$650,202		\$650,202	
11 by Seventeen	Paige Turner			Account	Target	Jim Taylor		\$402,000	\$874,569	\$37,856	\$874,569	
Control Alt Delete	Lauren Order			Account	Hot	Jim Taylor			\$53,497	\$152,923	\$53,497	
A4 Graphics	Hugo First			Suspect		Jim Taylor						
Database Testing, Inc.	Noah Dia			Account	Target	Jim Taylor		\$195,000	\$49,729		\$49,729	
A4 Graphics	Gladys Overwith			Account	Hot	Jim Taylor		\$12,456	\$21,805	\$172,790	\$21,805	



ADDRESS LIST View

Find and sort your contacts

Underlined column headers will sort the found contacts

Segment View	Date View	<u>\$ View</u>	<u>Company</u>	<u>Name</u>	Select X	<u>Category</u>	<u>Temp.</u>	<u>Sales Rep</u>	<u>Budget</u>	<u>YTD</u>	<u>Last Year</u>	<u>12 Months</u>
11 by Seventeen			Paige Turner			Account	Target	Jim Taylor	\$182,000	\$87,000	\$87,000	\$87,000
File Edit View, Inc.			Hugh Saturation			Prospect	Hot	Jim Taylor		\$650,202		\$650,202
Abort Retry Ignore			Serge Protector			Account	Target	Jim Taylor	\$262,500	\$453,050		\$453,050
Database Testing, Inc.			Amber Lith			Account	Hot	Jim Taylor		\$170,559	\$34,650	\$170,559

Click on a listed contact to go to their Input screen

Category and Temperature can be entered on the list view or on the Input screen

Cust. # 051.0004

Category Account Temp. Target

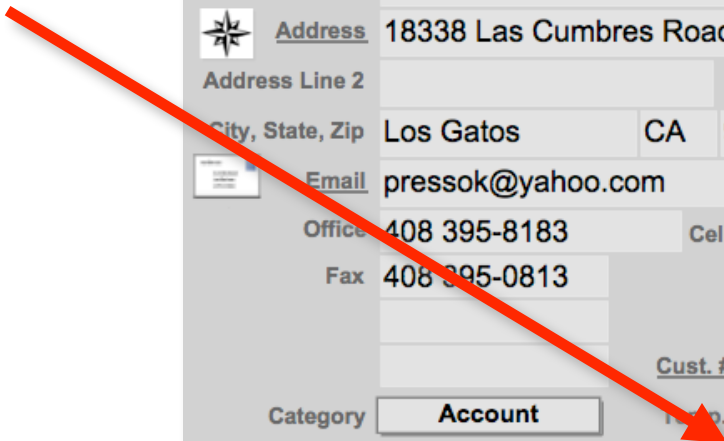
JOBS / date MEMOS Notes Delivery Budget Coworkers Alt.

Notes

This area is for general notes about the contact. The "History" field is kept automatically by using the "Last Contact" and "Next Contact" buttons.

Input Screen

- Click on the Budget Tab



	JOBS	MEMOS	INPUT	COMPANY	LINKS
(L)	Name	Mr. Noah Dia			
	Title	Marketing			
	Company	Database Testing, Inc.			
	Co. Type	Computer Manufacturer			
★	Address	18338 Las Cumbres Road			
	Address Line 2			Country:	▼
	City, State, Zip	Los Gatos	CA	95033	
	Email	pressok@yahoo.com			
	Office	408 395-8183	Cell	408 666-7356	
	Fax	408 395-0813			
			Cust. #	051.0004	
	Category	Account	Target		
	JOBS	/ date	MEMOS	Notes	Delivery
				Budget	Coworkers
				Alt.	
	<u>Notes</u>				
	This area is for general notes about the contact. The "History" field is kept automatically by using the "Last Contact" and "Next Contact" buttons.				
	From this screen you can also directly access and create jobs and correspondence that remains linked to this person.				
	Former Company				



Budget Tab

- Select Month, Year
- Select Plant
- Press Type is Optional
- Enter Projected Sales
 - For that Month
 - To that Plant
 - To this contact

Name Mr. Noah Dia
 Title Marketing
 Company Database Testing, Inc.
 Co. Type Computer Manufacturer
 Address 18338 Las Cumbres Road
 Address Line 2
 City, State, Zip Los Gatos CA 95033
 Email pressok@yahoo.com
 Office 408 395-8183 Cell 408 666-7356
 Fax 408 395-0813
 Cust. # 051.0004
 Category **Account** Temp. **Target**

Month	Year	Plant	Type	Amount

\$Plan Last Year **\$114,036** Budget
 Budget Report YTD **\$49,729**

\$ Plan: How to sell Noah Dia
 Noah likes classic muscle cars and plays golf. Has the entire collateral budget.



Build a Budget

- One row at a time
- One contact at a time
- It will all roll up

🗺️
JOB
MEMOS
INPUT
COMPANY
LINKS

🕒 **Name** Mr. Noah Dia

Title Marketing

Company Database Testing, Inc.

Co. Type Computer Manufacturer

🌟 **Address** 18338 Las Cumbres Road

Address Line 2 **Country:** ▼

City, State, Zip Los Gatos CA 95033

📧 **Email** pressok@yahoo.com

Office 408 395-8183 **Cell** 408 666-7356

Fax 408 395-0813

Cust. # 051.0004

Category Account **Temp.** Target

JOB
/ date
MEMOS
Notes
Delivery
Budget
Coworkers
Alt.

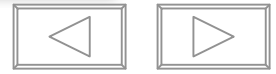
Month	Year	Plant	Type	Amount
January	2010	PDX	W	\$125,000

\$Plan Last Year \$114,036 **Budget** \$125,000

Budget Report YTD \$49,729

\$ Plan: How to sell Noah Dia \$125,000

Noah likes classic muscle cars and plays golf. Has the entire collateral budget.



Build a Budget

- Use as many rows as you need

Month	Year	Plant	Type	Amount
January	X 2010	PDX	W	\$125,000
February	X 2010	SEA	S	\$25,000
March	X 2010	OC	D	\$10,000
January	X			
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Last Year: \$114,036 Budget: \$160,000 YTD: \$49,729

Total appears here

If you have been using JOBZ! for a while, last year and current year sales to date will appear

Build a Budget

- Delete a row with the red X

JOBZ	/ date	MEMOS	Notes	Delivery	Budget	Coworkers	Alt.
Month		Year	Plant	Type		Amount	
July	X	2010	LA			\$152,000	▲
August	X	2010	LA			\$250,000	
September	X	2010	LA			\$600,000	
	X	Delete Row					▼
12 Mo	\$874,569	2008	\$37,856	Budget	\$1,002,000		
				YTD	\$874,569		
\$ Plan Note \$Plan Budget Report							
The "\$ Plan" shows last year's sales, this years sales and your budget for the contact (in red until it is met.)							

If you have been using JOBZ! for a while, training 12 months, last year and current year sales to date will appear

Browse Contacts



Go to the next record in the found set

Name Ms. Gladys Overwith
Title Designer
Company Arrowspace
Co. Type Banking
Address 18338 Las Cumbres Road
Address Line 2 Country: ▾
City, State, Zip Los Gatos CA 95033
Email pressok@yahoo.com
Office 408 395-8183 **Cell** 408 666-7356
Fax 408 395-0813
Cust. #
Category **Account** **Temp.** **Target**

Month	Year	Plant	Type	Amount

\$Plan Last Year **\$82,490** **Budget**
Budget Report YTD **\$106,713**

\$ Plan: How to sell Gladys Overwith
 This is a brief description of how you intend to sell to this contact. There is also a detailed company-level plan.

Set another contact with a budget



See Your Budget

- Roll it up!

JOB	/ date	MEMOS	Notes	Delivery	Budget	Coworkers	Alt.
Month	Year	Plant	Type	Amount			
July	X 2010	LA		\$152,000			
August	X 2010	LA		\$250,000			
	X						
12 Mo	\$874,569	2008	\$37,856	Budget	\$402,000		
\$ Plan Note	\$Plan	Budget Report	YTD	\$874,569			

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

Keep an eye on your budget with the \$Plan

See your entire budget with the Budget Report

These will produce reports.



The \$Plan

Set a Budget for a contact in the Budget tab on the ADDRESS input screen.

- Run the \$Plan or print the \$Plan Report.
- Keep your eye on the plan.

ACCOUNTS		COMPANY		OUTPUT		LIST		JOBS		MEMOS		MANAGER		HELP	
Accounts	Prospects	Suspects	All Accounts & Prospects		Clear X	Find Select X	X All	ALL	FIND	NEW					
Contact Today- HOT		Contact Next		Missed Next		Recent		Modified Today		Birthdays		Calendar		\$Plan	
Company	Name	Omit Select	Last Contact	Since Last	#	Next	+	-	Temp.	Segment	\$Plan Report				
11 by Seventeen Paige Turner 408-395-8183			Today	Thu 9/17		Next	+1	+30		Demo Catalogs	Paige likes to do everything by email.				
			Since Last / #	10 / 1		Wed 9/23			Target						
			What	Sent Proposal					Account						
			Result	Hecht With it All		Follow up			What						
			9/23/2009 Previous Cust. # 051.301796			Reason for the follow-up; something to talk about.									
			9/17/2009: Sent Proposal Hecht With it All												
			8/20/2009: Sent Email Re: Shipping hours												
Jim Taylor			Last Year \$37,856			YTD \$339,252			Budget	\$632,000					
Database Testing, Inc. Rich Text 408 395-8183 x123			Today	Thu 9/17		Next	+1	+30		Digital Variable Data Mailing Fulfillment Demo	Rich buys the best printing and the best wine.				
			Since Last / #	10 / 44		Thu 10/22			Target						
			What	Mailing					Account						
			Result	Bud sample		Get meeting			What						
			9/23/2009 Previous Cust. # 100061			Need to quote the annual report this year!			Why						
			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			Last Year \$77,920			YTD \$267,386			Budget	\$390,000					

Run a screen view of the \$Plan.

Print a hard copy of the \$Plan.

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	Next +1 +30 Wed 9/23 Target Account Follow up Reason for the follow-up; something to talk about.	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.)
Jim Taylor	Last Year \$37,856 YTD \$302,484 Budget \$632,000		
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	Next +1 +30 Thu 10/22 Target Account Get meeting Need to quote the annual report this year!	Digital Variable Data Mailing Fulfillment Demo Rich buys the best printing and the best wine.
Jim Taylor	Last Year \$92,703 YTD \$469,386 Budget \$400,000		
			\$1,032,000

At the bottom of the \$Plan will be your total rolled-up budget.
 If it isn't big 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

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

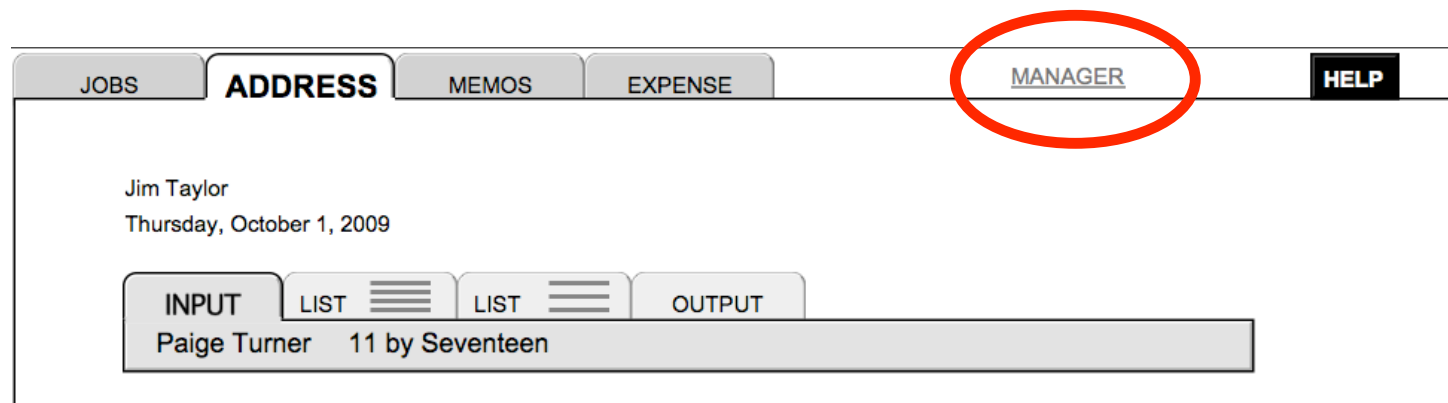
1 JOBZ!

Plant sold into



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
- You also have access to the Manager screen, where you have additional reports



For Managers:

- Budget Tab on Manager screen

Address Manager Screen

Company: Database Testing, Inc. Assigned Sales Rep: Jim Taylor

Name: Rich Text Region: Northern California

Account Exec: 408 395-8183 x123 CSR: George Martin


408 395-8183 x123 Category: Account

101 California Street Suite 4000 Temperature: Target

San Francisco CA 92124 Manager Temperature: Hot

rich@dti.com

Month	Year	Plant	Type	Amount
June	X 2010	LA	S	\$110,000
August	X 2010	SF	S	\$10,000
September	X 2010	LA	S	\$10,000
October	X 2010	SF	W	\$10,000
November	X 2010	CAD	W	\$200,000
December	X 2010	LA	S	\$60,000
	X			

Budget Reports
[/Rep /Month /Customer /Contact](#)
[/Month /Rep /Customer /Contact](#) 
[/Month /Plant /Rep /Customer](#)

Filtered Budget Reports
Detailed [/Rep /Month /Cust /Contact](#)
Summary [/Region /Rep](#)
[/Month /Rep /Cust /Contact](#) [/Month /Rep](#)
[/Plant /Region /Month](#)

Last Year: \$92,703 Budget: \$400,000
 YTD: \$469,386

\$ Plan: How to sell Rich Text \$400,000
 Rich buys the best printing and the best wine.

Filtered Budget Report Title:
 Budget Year Default: 2010
[Reset all existing to above year](#)

Budget Reports, including Excel export.

Filtered Reports allow you to specify regions, reps, plants, months or quarters.

And optionally give the report a title.



Filtered Manager Reports

Focus on a subset of data

1. Give it a title

2. Click a report link

Filtered Budget Reports

Detailed	Summary
<u>/Rep /Month /Cust /Contact</u>	<u>/Region /Rep</u>
<u>/Month /Rep /Cust /Contact</u>	<u>/Month /Rep</u>
	<u>/Plant /Region /Month</u>

Filtered Budget Report Title

NorCal Sales Region, SF Plant, Q1 Sales

Enter filter criteria and click: Continue

Region

Sales Rep

Plant

Press

Month

Quarter

Year

Contact

Contact Company

3. Apply the criteria, click Continue



Filtered Report Result

To printer or PDF, with title & footer

Sales Budget NorCal Sales Region, SF Plant, Q1 Sales

Eric Clapton			
January	\$100,000	\$100,000	Cursory Software Megan Whoopie \$100,000 SF
February	\$125,000	\$125,000	Cursory Software Megan Whoopie \$125,000 SF
March	\$135,000	\$135,000	Synthesystems Justin Thyme \$135,000 SF
		\$360,000	Eric Clapton
Jim Taylor			
January	\$110,000	\$10,000	Database Testing, Inc. Phil Thepresses \$10,000 SF
		\$100,000	File Edit View, Inc. Ken Tankerous \$100,000 SF
		\$110,000	Jim Taylor
		\$470,000	

Sales Budget Jimmy Buffet Only

Jimmy Buffett			
January	\$135,000	\$10,000	Abort Retry Ignore Caesar Boldly \$10,000 SEA
		\$125,000	Buffalo Rome Allen Wrench \$125,000 SEA
February	\$300,000	\$50,000	Abort Retry Ignore Caesar Boldly \$50,000 SEA
		\$250,000	Buffalo Rome Allen Wrench \$250,000 SEA
August	\$25,000	\$25,000	Client, Inc. Caesar Boldly \$25,000 SEA
October	\$125,000	\$125,000	Client, Inc. Caesar Boldly \$125,000 SEA
		\$585,000	Jimmy Buffett
		\$585,000	

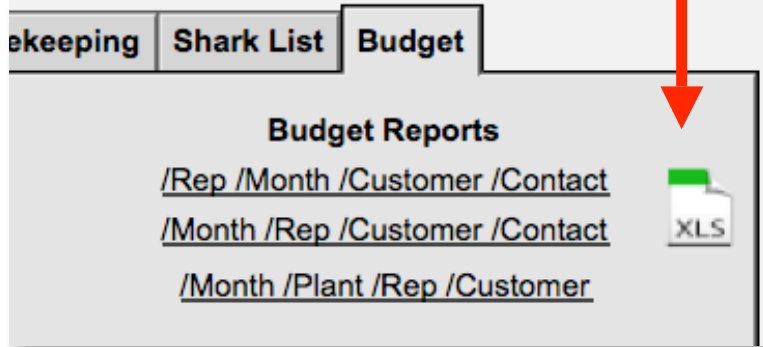
Another example, focus on a single rep

Footer shows date, page count and report author.



Spreadsheet

Will export data as an Excel file that can then be combined with others and manipulated.



Export Format

	A	B	C	D	E	F	G	H	I
	Contact	Company	Month	Year	Quarter	Plant	Type	Amount	SalesRep
2	Megan Whoopie	Cursory Software	January	2010	1 SF	S	S	\$100,000	Eric Clapton
3	Megan Whoopie	Cursory Software	February	2010	1 SF	W	S	\$125,000	Eric Clapton
4	Justin Thyme	Synthesystems	March	2010	1 SF	S	S	\$135,000	Eric Clapton
5	Justin Thyme	Synthesystems	April	2010	2 SF	W	S	\$130,000	Eric Clapton
6	Noah Dia	Database Testing, Inc.	January	2010	1 PDX	W	S	\$125,000	Jim Taylor
7	Phil Thepresses	Database Testing, Inc.	January	2010	1 SF	W	S	\$10,000	Jim Taylor
8	Ken Tankerous	File Edit View, Inc.	January	2010	1 SF	W	S	\$100,000	Jim Taylor
9	Noah Dia	Database Testing, Inc.	February	2010	1 SEA	S	S	\$25,000	Jim Taylor
10	Phil Thepresses	Database Testing, Inc.	February	2010	1 OC	S	S	\$20,000	Jim Taylor
11	Noah Dia	Database Testing, Inc.	March	2010	1 OC	D	S	\$10,000	Jim Taylor
12	Rich Text	Database Testing, Inc.	June	2010	2 LA	S	S	\$110,000	Jim Taylor
13	Paige Turner	11 by Seventeen	July	2010	3 PDX	D	S	\$152,000	Jim Taylor
14	Paige Turner	11 by Seventeen	August	2010	3 OC	WF	S	\$250,000	Jim Taylor
15	Paige Turner	11 by Seventeen	September	2010	3 LA	S	S	\$10,000	Jim Taylor
16	Rich Text	Database Testing, Inc.	September	2010	3 LA	S	S	\$10,000	Jim Taylor
17	Rich Text	Database Testing, Inc.	October	2010	4 SF	W	S	\$10,000	Jim Taylor
18	Rich Text	Database Testing, Inc.	November	2010	4 CAD	W	S	\$200,000	Jim Taylor
19	Rich Text	Database Testing, Inc.	December	2010	4 LA	S	S	\$80,000	Jim Taylor
20	Caesar Boldly	Abort Retry Ignore	January	2010	1 SEA	W	S	\$10,000	Jimmy Buffett
21	Allen Wrench	Buffalo Rome	January	2010	1 SEA	D	S	\$125,000	Jimmy Buffett
22	Caesar Boldly	Abort Retry Ignore	February	2010	1 SEA	S	S	\$50,000	Jimmy Buffett
23	Allen Wrench	Buffalo Rome	February	2010	1 SEA	S	S	\$250,000	Jimmy Buffett
24	Caesar Boldly	Client, Inc.	August	2010	3 SEA	S	S	\$25,000	Jimmy Buffett
25	Caesar Boldly	Client, Inc.	October	2010	4 SEA	W	S	\$125,000	Jimmy Buffett

Month	Region	SalesRep	Total
January	Northern California	Eric Clapton	\$ 100,000
		Jim Taylor	\$ 235,000
	Northern California Total		\$ 335,000
	Pacific Northwest	Jimmy Buffett	\$ 135,000
	Pacific Northwest Total		\$ 135,000
January Total			\$ 470,000
February	Northern California	Eric Clapton	\$ 125,000
		Jim Taylor	\$ 45,000
	Northern California Total		\$ 170,000
	Pacific Northwest	Jimmy Buffett	\$ 300,000
	Pacific Northwest Total		\$ 300,000
February Total			\$ 470,000
March	Northern California	Eric Clapton	\$ 135,000
		Jim Taylor	\$ 10,000
	Northern California Total		\$ 145,000
March Total			\$ 145,000
April	Northern California	Eric Clapton	\$ 130,000
	Northern California Total		\$ 130,000
April Total			\$ 130,000
June	Northern California	Jim Taylor	\$ 110,000
	Northern California Total		\$ 110,000
June Total			\$ 110,000
July	Northern California	Jim Taylor	\$ 152,000
	Northern California Total		\$ 152,000
July Total			\$ 152,000
August	Northern California	Jim Taylor	\$ 250,000
	Northern California Total		\$ 250,000
	Pacific Northwest	Jimmy Buffett	\$ 25,000
	Pacific Northwest Total		\$ 25,000
August Total			\$ 275,000
September	Northern California	Jim Taylor	\$ 20,000
	Northern California Total		\$ 20,000
September Total			\$ 20,000
October	Northern California	Jim Taylor	\$ 10,000
	Northern California Total		\$ 10,000
	Pacific Northwest	Jimmy Buffett	\$ 125,000
	Pacific Northwest Total		\$ 125,000
October Total			\$ 135,000
November	Northern California	Jim Taylor	\$ 200,000
	Northern California Total		\$ 200,000
November Total			\$ 200,000
December	Northern California	Jim Taylor	\$ 80,000
	Northern California Total		\$ 80,000
December Total			\$ 80,000
Grand Total			\$ 2,187,000

Pivot Table

