



Identifier Distribution Analysis Report System

High Visibility Forecasting: Identifier adds a new hierarchy dimension to Agency/Distributor opportunities.

Our exclusive Revenue 'Distribution' calculation design and the Identifier module (multi-hierarchy for opportunities) are standard features on all MosaicCRM systems and provide ultra accurate projection analysis of both completed sales and pipeline/projected sales values.

Sales Management Identifier Distribution Results																							
Identifier	Owner	Stage	Account Name	Client Name	Product	Term	Units	# Mos	Start Date	January	February	March	April	May	June	July	August	September	October	November	December	Total	
Sacramento, CA	Bill Jones	Closed Sale	AcmeHouston	McDonald's	Trucksides		32	2	04/07/2011			26800	14000									40800	
									Total	0	0	26800	14000	0	0	0	0	0	0	0	0	0	40800
Colorado Springs, CO	Bill Jones	Closed Sale	AcmeHouston	McDonald's	Trucksides	3-5 billing periods	72	4	07/18/2011				14200	7200	7200	7200							35800
									Total	0	0	0	14200	7200	7200	7200	0	0	0	0	0	0	35800
Colorado Springs, CO	Bill Jones	Closed Sale	AcmeHouston	McDonalds	Trucksides	3-5 billing periods	72	4	07/18/2011				14200	7200	7200	7200							35800
									Total	0	0	0	14200	7200	7200	7200	0	0	0	0	0	0	35800
Colorado Springs, CO	John Smith	Closed Sale	AdWorks	McDonald's	Trucksides	3-5 billing periods	72	4	07/18/2011														
									Total														
Colorado Springs, CO	Bill Jones	Closed Sale	AdWorks	McDonalds	Trucksides	3-5 billing periods	72	4	07/18/2011														
									Total														
									Colorado Total														
Washington, DC	Bill Jones	Closed Sale	AdWorks	WHUR Radio	Trucksides	6 + billing periods	210	8	10/28/2011														
									Total														
Washington, DC	John Smith	Closed Sale	Master Marketers	Subway	Trucksides		46	1	07/11/2011														
									Total														
Washington, DC	John Smith	Closed Sale	AcmeHouston	WHUR Radio	Trucksides	6 + billing periods	210	8	10/28/2011														
									Total														
Washington, DC	John Smith	Closed Sale	Master Marketers	Subway	Trucksides		46	1	07/11/2011														
									Total														
									District of Color														
Fort Myers/Naples, FL	John Smith	Closed Sale	Master Marketers	Subway	Trucksides		5	1	01/03/2011	88													
									Total	88													
Jacksonville, FL	John Smith	Closed Sale	AcmeHouston	MetroPCS	Trucksides		33	3	03/17/2011	121													
Jacksonville, FL	John Smith	Closed Sale	AcmeHouston	MetroPCS	Trucksides		22	2	11/30/2011														
									Total	121													
Fort Myers/Naples, FL	Bill Jones	Closed Sale	AcmeHouston	Subway	Trucksides		5	1	01/03/2011	88													

This report provides a distributed projection analysis by Identifier together with a comprehensive array of fields related to the projections.

- Ideal for Agency to track and analyze multiple Customers associated with a specific Agency/Distributor.
- Including key sales opportunity data fields and how these are associated with where the opportunity was generated together with any related master Account/Agency affiliations.
- Simultaneously tracks both \$ and Unit values.

This report is just one of many strategic tools I have designed into MosaicCRM that enable your organization to achieve and maintain complete control over managing pipelines. All of these show what numbers to watch and how they can predict success into the future. For a demonstration, please contact me.

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