# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Ace Pet Store Franchises

| Total Histories | New Opportunity | Opportunity Stage | Opportunity Won |
|---|---|---|---|
| 5 | 3 | 1 | 1 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Friday, March 27, 2009** | | | | |
| Ace Pet Store Franchises | Jim Curtis | Opportunity Stage Update | Trial for Oregon Franchises - ACT! Sales Cycle: Needs Assessment 25% | Chris Huffman |
| **Tuesday, September 01, 2009** | | | | |
| Ace Pet Store Franchises | Jackie Jorgensen | New Opportunity | Replacement Parts - ACT! Sales Cycle Initial Communication 10% | Ernst Anderson |
| **Thursday, October 29, 2009** | | | | |
| Ace Pet Store Franchises | Gavin Dillerstone | New Opportunity | Upgrade for Oregon - ACT! Sales Cycle Initial Communication 10% | Ernst Anderson |
| **Friday, October 30, 2009** | | | | |
| Ace Pet Store Franchises | Gavin Dillerstone | New Opportunity | New Opportunity - ACT! Sales Cycle Needs Assessment 25% | Chris Huffman |
| **Friday, November 27, 2009** | | | | |
| Ace Pet Store Franchises | Gavin Dillerstone | Opportunity Won | Oregon Franchises $12,000.00 Closed - Won<br>Current Client Relationship Friday, November 28, 2008 12:00:00 AM<br><br>More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. More details. The End. | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Boomer's Artworx

| Total Histories | Field Changed |
|---|---|
| 1 | 1 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Friday, November 13, 2009** | | | | |
| Boomer's Artworx | Bettie James | Field Changed | Field changed<br>Estimated Close Date Field Lawrenceville Expansion changed from "Wednesday, March 27, 2010" to "Thursday, August 26, 2010". | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Brandee's Bakery

| Total Histories | New Opportunity |
|---|---|
| 2 | 2 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Friday, July 17, 2009** | | | | |
| Brandee's Bakery | Liz Dittmeier | New Opportunity | New Opportunity - ACT! Sales Cycle Negotiation 65% | Chris Huffman |
| **Saturday, October 17, 2009** | | | | |
| Brandee's Bakery | Liz Dittmeier | New Opportunity | New Opportunity - ACT! Sales Cycle Initial Communication 10% | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Brushy's Golfing World

| Total Histories | New Opportunity |
|---|---|
| 3 | 3 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Wednesday, March 18, 2009** | | | | |
| Brushy's Golfing World | Paul Brushman | New Opportunity | New Zealand - ACT! Sales Cycle Presentation 40% | Ernst Anderson |
| **Saturday, April 18, 2009** | | | | |
| Brushy's Golfing World | Paul Brushman | New Opportunity | New Guinea - ACT! Sales Cycle Initial Communication 10% | Ernst Anderson |
| **Saturday, August 01, 2009** | | | | |
| Brushy's Golfing World | Paul Brushman | New Opportunity | NSW Upgrade - ACT! Sales Cycle Sales Fulfillment 90% | Ernst Anderson |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## CH TechONE

| Total Histories | Call Completed | Contact Deleted | Meeting Held |
|---|---|---|---|
| 25 | 3 | 14 | 8 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Thursday, April 09, 2009** | | | | |
| CH Gourmet Coffee | Fred Fenderline | Call Completed | European Sales Meeting Conference Call | Chris Huffman |
| CH TechONE | Ernst Anderson | Meeting Held | USA Sales Meeting | Chris Huffman |
| CH TechONE | Chris Huffman | Meeting Held | USA Sales Meeting | Chris Huffman |
| CH TechONE | Chris Huffman | Call Completed | European Sales Meeting Conference Call | Chris Huffman |
| CH TechONE | Allison Mikola | Meeting Held | USA Sales Meeting | Chris Huffman |
| CH TechONE | Sarah Whiting | Call Completed | European Sales Meeting Conference Call | Chris Huffman |
| **Friday, April 24, 2009** | | | | |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! New Zealand has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT Training has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Latin America has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Belgium has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT Design Specialists has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! UK has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! France has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Singapore has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Australia has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Canada has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Holland has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! China has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! Germany has been deleted. | Chris Huffman |
| CH TechONE | Chris Huffman | Contact Deleted | Contact ACT! USA has been deleted. | Chris Huffman |
| **Tuesday, August 04, 2009** | | | | |
| CH TechONE | Chris Huffman | Meeting Held | Write Article for E-Newsletter | Chris Huffman |
| **Wednesday, August 05, 2009** | | | | |
| CH TechONE | Chris Huffman | Meeting Held | Network Breakfast | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## CH TechONE

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Saturday, August 08, 2009** | | | | |
| CH TechONE | Ernst Anderson | Meeting Held | USA Sales Meeting | Ernst Anderson |
| CH TechONE | Chris Huffman | Meeting Held | USA Sales Meeting | Ernst Anderson |
| CH TechONE | Allison Mikola | Meeting Held | USA Sales Meeting | Ernst Anderson |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Freemont Corp

| Total Histories | Opportunity Won |
|---|---|
| 1 | 1 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Thursday, July 30, 2009** | | | | |
| Freemont Corp | Dylan Nguyen | Opportunity Won | Home Office $12,000.00 Closed - Won<br>Current Client Relationship Thursday, July 30, 2009 12:00:00 AM | Allison Mikola |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Green Plastics

| Total Histories | Opportunity Stage |
|---|---|
| 3 | 3 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Friday, April 10, 2009** | | | | |
| Green Plastics | Ben Braddock | Opportunity Stage Update | LA Office - ACT! Sales Cycle: Needs Assessment 25% | Chris Huffman |
| Green Plastics | Eric Johnson | Opportunity Stage Update | LA Office - ACT! Sales Cycle: Needs Assessment 25% | Chris Huffman |
| Green Plastics | Mr. Joe McGuire | Opportunity Stage Update | LA Office - ACT! Sales Cycle: Needs Assessment 25% | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Jake Flakes Inc.

| Total Histories | New Opportunity |
|---|---|
| 2 | 2 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Tuesday, September 01, 2009** | | | | |
| Jake Flakes Inc. | Rudy Nordstrom | New Opportunity | New Opportunity - ACT! Sales Cycle Presentation 40% | Chris Huffman |
| **Saturday, October 17, 2009** | | | | |
| Jake Flakes Inc. | Rudy Nordstrom | New Opportunity | Jake Flakes-SC and Replacement Parts - CHT1 Service: Service Site Visit 25% | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Mercury Production Management

| Total Histories | New Opportunity |
|---|---|
| 3 | 3 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Monday, April 27, 2009** | | | | |
| Mercury Production Management | Albert Barry | New Opportunity | New Opportunity - ACT! Sales Cycle Commitment to Buy 100% | Chris Huffman |
| **Thursday, December 17, 2009** | | | | |
| Mercury Production Management | Albert Barry | New Opportunity | New Opportunity - ACT! Sales Cycle Initial Communication 10% | Chris Huffman |
| Mercury Production Management | Albert Barry | New Opportunity | New Opportunity - ACT! Sales Cycle Presentation 40% | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Yellow Jersey Bikes

| Total Histories | Meeting Held | New Opportunity | Opportunity Stage | Quote |
|---|---|---|---|---|
| 13 | 3 | 3 | 6 | 1 |

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Friday, April 17, 2009** | | | | |
| Yellow Jersey Bikes | Ethan Campbell | New Opportunity | YJBikes-Texas Operations - CHT1 Sales: Initial Communication 10% | Chris Huffman |
| Yellow Jersey Bikes | Wilhelm Loke | New Opportunity | YJBikes-Texas Operations - CHT1 Sales: Initial Communication 10% | Chris Huffman |
| Yellow Jersey Bikes | Lance Parker | New Opportunity | YJBikes-Texas Operations - CHT1 Sales: Initial Communication 10% | Chris Huffman |
| **Thursday, April 23, 2009** | | | | |
| Yellow Jersey Bikes | Wilhelm Loke | Quote | Quote # 2009 | Chris Huffman |
| **Tuesday, June 16, 2009** | | | | |
| Yellow Jersey Bikes | Ethan Campbell | Opportunity Stage Update | YJBikes-Texas Operations - CTH1 Sales: Needs Assessment 25% | Chris Huffman |
| Yellow Jersey Bikes | Wilhelm Loke | Opportunity Stage Update | YJBikes-Texas Operations - CTH1 Sales: Needs Assessment 25% | Chris Huffman |
| Yellow Jersey Bikes | Lance Parker | Opportunity Stage Update | YJBikes-Texas Operations - CTH1 Sales: Needs Assessment 25% | Chris Huffman |
| **Tuesday, August 25, 2009** | | | | |
| Yellow Jersey Bikes | Ethan Campbell | Meeting Held | Presentation<br>Lance is excited about this new Texas plant. They are working to make this a prototype for their future operations. TechONE Systems is currently part of all of their future plans to help them to be environmentally friendly. Lance expects (as we all do) that energy prices will only go up and he expects that our implementations could significanly increase ROI of all his operations.<br><br>Ethan also seems to be moving the process along. He has much of the required paperwork done and is trying to stay ahead of Wlihelm and the rest of operations. They are moving pretty fast though so he has his work cut out for him. | Chris Huffman |
| Yellow Jersey Bikes | Ethan Campbell | Opportunity Stage Update | YJBikes Texas Operations - CTH1 Sales: Presentation 40% | Chris Huffman |

# Company Contact History Report

**Date Range:** January 1, 2009 to December 31, 2009

## Yellow Jersey Bikes

| Company | Contact | Type | Regarding & Details | Record Manager |
|---|---|---|---|---|
| **Tuesday, August 25, 2009** | | | | |
| Yellow Jersey Bikes | Wilhelm Loke | Meeting Held | Presentation<br>Lance is excited about this new Texas plant. They are working to make this a prototype for their future operations. TechONE Systems is currently part of all of their future plans to help them to be environmentally friendly. Lance expects (as we all do) that energy prices will only go up and he expects that our implementations could significanly increase ROI of all his operations.<br><br>Ethan also seems to be moving the process along. He has much of the required paperwork done and is trying to stay ahead of Wlihelm and the rest of operations. They are moving pretty fast though so he has his work cut out for him. | Chris Huffman |
| Yellow Jersey Bikes | Wilhelm Loke | Opportunity Stage Update | YJBikes Texas Operations - CTH1 Sales: Presentation 40% | Chris Huffman |
| Yellow Jersey Bikes | Lance Parker | Meeting Held | Presentation<br>Lance is excited about this new Texas plant. They are working to make this a prototype for their future operations. TechONE Systems is currently part of all of their future plans to help them to be environmentally friendly. Lance expects (as we all do) that energy prices will only go up and he expects that our implementations could significanly increase ROI of all his operations.<br><br>Ethan also seems to be moving the process along. He has much of the required paperwork done and is trying to stay ahead of Wlihelm and the rest of operations. They are moving pretty fast though so he has his work cut out for him. | Chris Huffman |
| Yellow Jersey Bikes | Lance Parker | Opportunity Stage Update | YJBikes Texas Operations - CTH1 Sales: Presentation 40% | Chris Huffman |