Group History Report

Date Range: March 1, 2012 to March 31, 2012

Customers

Total Histories	Meeting Held	New Opportunity	Opportunity Stage	To-do Done
12	2	2	2	6

Company	Contact	Type	Regarding & Details	Record Manager
Wednesday, March 07, 2012				
Brandee's Bakery	Mackenzie Jensen	To-do Done	Place quarterly order	Chris Huffman
Corleone's Pasta Company	Morty Manicotti	Meeting Held	Lunch Meeting	Allison Mikola
Saturday, March 10, 2012				
AVB Enterprises	Suzie Lee	Meeting Held	Demonstration	Chris Huffman
Wednesday, March 14, 2012				
A1 Services of UK	Ann Goodall	To-do Done	Check Credit and Set Up New Account	Juliette Rosseux
A1 Services of UK	Ann Goodall	To-do Done	Send New Customer Packet	Melissa Pearce
Quality Motors	Julie Britton	Opportunity Stage Update	Garage - ACT! Sales Cycle: Needs Assessment 25%	Chris Huffman
Thursday, March 15, 2012				
Django Consulting	Dan Minnick	To-do Done	AS-Send New Customer Packet	Chris Huffman
Django Consulting	Dan Minnick	To-do Done	AS-Change ID/Status to Customer	Chris Huffman
Django Consulting	Dan Minnick	To-do Done	AS-Send Thank You Letter for First Order	Chris Huffman
Sunday, March 18, 2012				
Brandee's Bakery	Liz Dittmeier	New Opportunity	New Opportunity - ACT! Sales Cycle Initial Communication 10%	Chris Huffman
Jake Flakes Inc.	Bella Minoal	New Opportunity	Mixing Room - ACT! Sales Cycle Initial Communication 10%	Chris Huffman
Thursday, March 29, 2012				
Studio Designs	Lucy Connor	Opportunity Stage Update	Cheshire Warehouse - ACT! Sales Cycle: Presentation 40%	Chris Huffman

Group History Report

Date Range: March 1, 2012 to March 31, 2012

Prospects

Total Histories	E-mail Sent	Meeting Held	New Opportunity
4	1	1	2

Company	Contact	Type	Regarding & Details	Record Manager
Thursday, March 08, 2012				
Green Plastics	Elaine R. Braddock	E-mail Sent	Subject: How TechONE Systems Improve ROI Elaine, I'm sending by courier the data that you requested. You should get it later today. Chris Chris Huffman, CEO CH TechONE *Phone:* (212) 555-2485 *Cell:* (212) 555-4784 www.CHTechONE.com	Chris Huffman
Saturday, March 17, 2012				
Liberty Savings & Loan	George Bailey	New Opportunity	NY Operations - ACT! Sales Cycle Initial Communication 10%	Chris Huffman
Sunday, March 18, 2012				
Harrison & Graham Garages	Ella Harrison	New Opportunity	SC - ACT! Sales Cycle Sales Fulfillment 90%	Ernst Anderson
Sunday, March 25, 2012				
		Meeting Held	Presentation	Chris Huffman

Group History Report

Date Range: March 1, 2012 to March 31, 2012

Prospects

Company	Contact	Type	Regarding & Details	Record Manager
Sunday, March 25, 2012				
			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. 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.	

Group History Report

Date Range: March 1, 2012 to March 31, 2012

TechONE Seminar

Total Histories	Call Completed	Meeting Held
2	1	1

Company	Contact	Type	Regarding & Details	Record Manager
Sunday, March 11, 2012				
Wilson Co.	Timothy Hanks	Meeting Held	Presentation	Chris Huffman
Friday, March 30, 2012				
Wilson Co.	Timothy Hanks	Call Completed	Presentation Tom is interested	Allison Mikola