Lost Revenues

1. From CRM module, click Lost Revenues. Lost Revenues/Missing Sales screen will appear:

Last Revenues / Missing Soles														
Save Close														
Details														
Revenue	venue	Opportunity Dat	e Campaign		Salesperson									
From 1/1/2017 🔲 To 12/31/2017	From 1/1/2	018 🗏 To 12/31/2018	3/21/2018	Campaign	~	Salesperson	~							
B View - De Export Filter (F3)														
Customer / Category / Item	Last 3 Years Ave. Sales	Last 3 Years Ave. Sales Units	01/01/2017 to 12/31/2017 Total Sales	01/01/2017 to 12/31/2017 Total Sales Qty.	01/01/2018 to 12/31/2018 Sales Shipped	01/01/2018 to 12/31/2018 Sales Shipped Qty.	01/01/2018 to 12/31/2018 Sales Not Yet Shipped	01/01/2018 to 12/31/2018 Sales Not Yet Shipped Qty.	01/01/2018 to 12/31/2018 Contracted					
4	428,341.67	3.00	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
a 🔚 Software	428,341.67	3.00	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
10	81,516.67	0.33	3 0.00	0.00	0.0	0 0.00	0.00	.00 0.0	0.00					
E 20	24,566.67	0.33	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
≣ 30	16,750.00	0.33	0.00	0.00	0.0	0.00 0.00		0.00	0.00					
₩ 40	108,875.00	0.33	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
50	22,333.33	0.33	0.00	0.00	0.00		0.00	0.00	0.00					
E 60	43,575.00	43,575.00 0.33		0.00	0.0	0 0.00	0.00	0.00	0.00					
70	43,575.00	0.33	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
E 80	43,575.00	0.33	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					
E 90	43,575.00	0.33	0.00	0.00	0.0	0 0.00	0.00	0.00	0.00					

Lost Revenues / Missing Sales																▲ □	
s	ave Close																
Details																	
	Revenue	evenue Compare to Revenue				Opportur	Opportunity Date Campaign				Salesp	erson					
	From 1/1/	1/1/2017 To 12/31/2017 From 1/1/2018 To 12/31/2018				018 🗐 3/21/20	8 🗉	Campaign v				Salesperson 🗸 🗸					
8 Wev- Dp Export Filter(F3)																	
50 21	o 12/31/2018 t Yet Shipped	01/01/2018 to 12/31/2018 Sales Not Yet Shipped Qty.	01/01/2018 to 12/3 Con	31/2018 (ntracted	01/01/2018 to 12/31/2018 Contracted Qty.	01/01/2018 to 12/31/2018 Total Sales	01/01/2	2018 to 12/31/2018 Total Sales Qty.	Units Difference	Units Perc	centage	Sales Difference	Sales Percentage	Lost Sale	Generate Opportu	Generate Campaig	Contact
	0.00	0.00		0.00	0.00	0.0	þ	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0		0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	D	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	b	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	0	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	0	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	þ	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	þ	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	b	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	þ	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	2	0.00	0.00		0.00	0.00	0.00				
	0.00	0.00		0.00	0.00	0.0	b	0.00	0.00		0.00	0.00	0.00				

2. User can set the date parameters (Revenue From and To Dates & Compare to Revenue From and To Dates)

3. To filter, input parameter in the filter text.

4. To generate opportunity, check the Generate Opportunity checkbox of the row item. User can select Salesperson in the Salesperson combo box. Click Save to generate the opportunity.

5. To add contact to a campaign, select campaign in the Campaign combo box and check the Generate Campaign checkbox of the row item(row must have an assigned contact). Click Save to generate campaign.