

# Lost Revenues

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

| 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 |
|----------------------------|-------------------------|-------------------------------|--------------------------------------|---|--|---|--|---|-------------------------------------|
| 428,341.67                 | 3.00                    | 0.00                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| Software                   | 428,341.67              | 3.00                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 10                         | 81,516.67               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 20                         | 24,566.67               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 30                         | 16,750.00               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 40                         | 108,875.00              | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 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  | 0.00                                |
| 60                         | 43,575.00               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 70                         | 43,575.00               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 80                         | 43,575.00               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |
| 90                         | 43,575.00               | 0.33                          | 0.00                                 | 0.00                                      | 0.00                                   | 0.00  | 0.00   | 0.00  | 0.00                                |

| 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 | 01/01/2018 to 12/31/2018 Contracted Qty. | 01/01/2018 to 12/31/2018 Total Sales | 01/01/2018 to 12/31/2018 Total Sales Qty. | Units Difference | Units Percentage | Sales Difference | Sales Percentage | Lost Sale                | Generate Opporntu        | Generate Campai          | Contact |
|--|---|-------------------------------------|--|--------------------------------------|---|------------------|------------------|------------------|------------------|--------------------------|--------------------------|--------------------------|---------|
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |
| 0.00   | 0.00  | 0.00                                | 0.00                                     | 0.00                                 | 0.00                                      | 0.00             | 0.00             | 0.00             | 0.00             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |

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.