

5 Way Numbers Report

Current Year - 2008 & Month -9

Your Strategies can change the numbers in blue.

	Last Year	Percentage Change	This Year
LEADS	98	70%	125
X			
CONVERSION RATE	76%	(19%)	61%
=			
New Customers	74	37%	76
Existing Customers	62	20%	56
Total Customers	136	29%	132
X			
No. of Transactions	148	56%	173
X			
Avg £Sale	£970	(36%)	£617
=			
Revenue	£143,592	(1%)	£106,821
X			
GROSS MARGIN %	44%	(12%)	39%
=			
GROSS PROFIT	£63,856	(13%)	£41,849

Cameno Action Coach 5 Way Numbers Report

The report has been written to work with ACT and a reporting tool call Crystal Clear Provider. This allows the report to be run directly from within ACT on the data in the database.

The aim of this report from the perspective of Cameno is that we will provide a single user copy of the report and the reporting tool free of charge to any company that takes out a Cameno Annual Support plan.

Report Notes

- All the figures in the report are based on standard ACT! fields except for LEADS which requires a field adding [Referred Date] to track when leads were added to the system.
- The rest of the report is based around opportunity records in ACT!.
- For the Last Year and This Year columns we have tried to use a similar colour scheme to that of the standard 5 Ways report.
- The percentage change column calculates based on the number of months i.e. If the report is for six months it presumes we will double the current figures to get the year totals and calculates based on them. The Current Year and Month are input at run-time.
- The boxed figures in the percentage column will change from red to green depending on whether the figure is negative or not.
- The unboxed figures in the Percentage change column are our own addition. We thought they show a few things but tried to do it without highlighting them! The text colour will again change depending on negative or positive figures.
- We have rounded the figures where appropriate.