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DYK #5: Rep Reports

Did You Know… that our EST Group Monthly Representative Reports (Rep Reports for short) are being redesigned? The new and improved Rep Reports will be coming out soon and have more and better streamlined information to help you track your sales and progress!

Here are a few of the benefits you'll notice with the new Rep Reports:

- Simplified reporting structure
- Side-by-side information tracking to view progress at a glance
- CRM Opportunity / Quote detail added for viewing ease
- Streamlined Booking and Sales information

EST Group Sales Partner Report (XYZ) Jan-25
XYZ Jim Inc / AB
ASM: Saquon Barkley Printed Date: 02-04-25

Corporate Headquarters
2701 Hatfield Township Line Rd.
Hatfield, PA 19440
PHONE: 215-721-1100

BOOKINGS & SALES

	January (2025)			YTD 2025			Full Year (2025)		2024 Total
	Actual	Forecast	%Forecast	Actual	Forecast	%Forecast	Forecast	%Forecast	Actual
Bookings	$ 183,266	$ 78,265	234%	$ 189,706	$ 78,265	242%	$ 1,169,866	16%	$ 890,842
Sales	$ 133,580	$ 76,547	175%	$ 133,580	$ 76,547	175%	$ 1,160,000	12%	$ 803,954

Sales by Product Segment

Segment	Jan-25	YTD 2025	2024 Total
Heat Exchanger	$ 41,584	$ 41,584	$ 624,295
Test & ISO	$ 90,872	$ 90,872	$ 164,829
Service	$ 0	$ 0	$ 3,900
Other	$ 1,124	$ 1,124	$ 10,930
Total	**$ 133,580**	**$ 133,580**	**$ 803,954**

CRM Opportunities/Quotes as of 02-04-25

	January (2025)			YTD 2025	
Status	Count	Exp. Value		Count	Exp. Value
Total Issued	35	$ 100,232		35	$ 100,232
Won	15	$ 54,775		15	$ 54,775
Lost	3	$ 7,502		3	$ 7,502
Active	17	$ 37,955		17	$ 37,955
		Active 2024 Quotes		17	$ 126,467

BOOKINGS BY MONTH

Month	Bookings	Forecast	% Forecast
January	$ 183,266	$ 78,265	234%
February	$ 6,440	$ 91,081	7%
March	$ 0	$ 105,178	0%
April	$ 0	$ 113,608	0%
May	$ 0	$ 110,850	0%
June	$ 0	$ 91,753	0%
July	$ 0	$ 83,601	0%
August	$ 0	$ 95,505	0%
September	$ 0	$ 109,427	0%
October	$ 0	$ 107,054	0%
November	$ 0	$ 97,553	0%
December	$ 0	$ 85,993	0%
2025 Total	**$ 189,706**	**$ 1,169,866**	**16%**

2025 is off to a good start...
Let's make it a great year!
😊

Information is power, and these new Rep Reports are designed to arm you with easier to digest and improved information. Attached is an example, although your individual one may look slightly different. We're confident you'll find the new formatting both easier to digest, more informative, and more visually streamlined. Please see the attached file for a preview of what the new Rep Reports will look like. Stay on the lookout as they're coming soon, and as always, stay hungry!