
ory Sales Plan SmartMaster

Table of Contents

or a button to use a SmartMaster sheet.

Sheet	Description
>	Err:502 Forecast or plan sales for specific accounts within a territory.
> Information	Help, tips, and details on file sharing, conventions, and macros used in this SmartMaster.



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1



Q1 Sales Plan

Territory

Date

Established Customers	This Yr. Forecast	Last Yr. Actual	% Change
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
Subtotals			#VALUE!

New Customers	This Yr. Forecast	Last Yr. Actual	% Change
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
			#VALUE!
Subtotals			#VALUE!

Prospective Customers	Expected Value	Close Quarter	Probability
Subtotals			

All Customers	This Yr. Forecast	Last Yr. Actual	% Change

Totals	#VALUE!	#VALUE!	#VALUE!
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Swap
Data



Change
#VALUE!

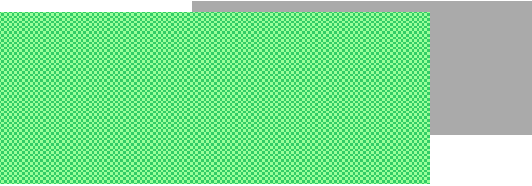
#VALUE!

Annual Potential

Change

Restore
Zoom

#VALUE!



Hide
Macros

Print

Range Na
Table

SCREEN-ADJUST	CODE	DESCRIPTION
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\0	{ZOOM_TEST} {Let ZM_NRML;@Vlookup(ZM_SCRN;ZM_TABLE;1)} {Let ZM_ALL;@Vlookup(ZM_SCRN;ZM_TABLE;2)} {Set "Window-Custom-Zoom";ZM_NRML}{Calc}{Quit}	; Senses screen re ; view preferences
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ZOOM_TEST	{If @Info("Screen-Width")<=640}{Let ZM_SCRN;640}{Return} {If @Info("Screen-Width")<=800}{Let ZM_SCRN;800}{Return} {If @Info("Screen-Width")<=1024}{Let ZM_SCRN;1024}{Return} {Let ZM_SCRN;1280}{Return}	
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ZM_SCRN	1024	
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	NORMAL	FULL PAGE
ZM_TABLE	640	85
	800	100
	1024	110
	1280	120

ZOOM FACTOR	CODE	DESCRIPTION
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ZOOM_RTN	{Set "Window-Custom-Zoom";ZM_ALL}{Quit}	; Sets view to disp
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ZM_NRML	110	
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ZM_ALL	46	
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ZM_RESTORE	{Set "Window-Custom-Zoom";ZM_NRML}{R}{L}{Quit}	; Resets view to no
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PRINT SHEET	CODE	DESCRIPTION
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SHT_PRINT	{Set "Print-Range";SHEET_RANGE}{Set "Print-Footer-Center-Text";""} {Set "Print-Orientation";"Portrait"}{Set "Print-Fit-Page";"Yes"} {Set "Print-Margin-Top";".75"} {Set "Print-Margin-Left";".75"}{Set "Print-Margin-Right";".75"} {Set "Print-Margin-Bottom";".25"} {BACKGRND 0}{Print?}{BACKGRND 2} {Quit}	; Prints spreadshe
-----------	--	--------------------

BACKGRND	{Define BCK_COL:V} {Let RNG_NUM;1}{BCK_LOOP}	; Sets / Resets ligh
----------	---	----------------------

BCK_LOOP	{Let RNG_NAME;"&@Right(@String(RNG_NUM+100;0);2)} {If 1-@Isrange(@@(RNG_NAME))}{Return} {Style-Interior BCK_COL;;;+RNG_NAME} {Let RNG_NUM;RNG_NUM+1}{Branch BCK_LOOP}	
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BCK_COL	2	
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PRINT INFORMATION CODE		DESCRIPTION
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INFO_PRINT	<pre>{Define INFO_TOPIC:V} {Dialog DLG_INFOPRT} {If RES_INFOPRT=0}{Quit} {Set "Print-Footer-Center-Text";"^"} {Set "Print-Centered";"Horizontal"} {Set "Print-Orientation";"Portrait"}{Set "Print-Size";"Fit-All"} {Set "Print-Margin-Top";".5"} {Set "Print-Margin-Left";".5"}{Set "Print-Margin-Right";".5"} {Set "Print-Margin-Bottom";".25"} {Let UPPER_LEFT;@Info("Origin")} {If ANS_INFOPRT=0}{INFO_CURR_PRT} {If ANS_INFOPRT}{Select @Vlookup(INFO_TOPIC;INFO_LIST;1)} {Style-Interior 0} {Print?} {Style-Interior 2} {Edit-Goto +UPPER_LEFT} {Quit}</pre>	; Prints Topics for
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INFO_CURR_PRT	<pre>{Select INF_OVER_RANGE} {Select-Append INF_STEP_RANGE} {Select-Append INF_TIPS_RANGE} {Select-Append INF_CONVENTION} {Select-Append INF_NOTE_RANGE} {Select-Append INF_ABOU_RANGE} {Return}</pre>	
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UPPER_LEFT	\$D:\$A\$281	
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INFO_LIST	<pre>1INF_OVER_RANGE 2INF_STEP_RANGE 3INF_TIPS_RANGE 4INF_CONVENTION 5INF_NOTE_RANGE 6INF_ABOU_RANGE</pre>	
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INFO_TOPIC	4	
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DLG_INFOPRT	<table border="1"> <tr> <td>DIALOG</td> <td>InfoPrint</td> <td></td> <td></td> <td></td> </tr> <tr> <td>-2134376400</td> <td>4</td> <td>63</td> <td>62</td> <td>152</td> </tr> <tr> <td>FONT</td> <td>8"Helv"</td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>8</td> <td>59</td> <td>10</td> <td>20</td> </tr> <tr> <td>8</td> <td>21</td> <td>56</td> <td>10</td> <td>21</td> </tr> <tr> <td>102</td> <td>4</td> <td>40</td> <td>14</td> <td>1</td> </tr> <tr> <td>102</td> <td>22</td> <td>40</td> <td>14</td> <td>2</td> </tr> <tr> <td>END DIALOG</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	DIALOG	InfoPrint				-2134376400	4	63	62	152	FONT	8"Helv"				8	8	59	10	20	8	21	56	10	21	102	4	40	14	1	102	22	40	14	2	END DIALOG					
DIALOG	InfoPrint																																									
-2134376400	4	63	62	152																																						
FONT	8"Helv"																																									
8	8	59	10	20																																						
8	21	56	10	21																																						
102	4	40	14	1																																						
102	22	40	14	2																																						
END DIALOG																																										

SAMPLE DATA	CODE	DESCRIPTION
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SAMPDATA	{Let CURR_SCEN;@Scenariolast(@Cellpointer("Filename"))}	; Displays Sample
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```

{If @Iserr(CURR_SCEN)}{Let CURR_SCEN;"unnamed"}
{If @Exact(CURR_SCEN;"sample")}{Branch SAMP_RESTORE}
{Dialog DLG_SAMPLE1}
{If RES_SAMPLE1=0}{Quit}
{Let PREV_SCEN;CURR_SCEN}
{UPDATE}
{Scenario-Show "sample"}{Calc}{Quit}

```

```

SAMP_RESTORE {Dialog DLG_SAMPLE2}
              {If RES_SAMPLE2=0}{Quit}
              {Scenario-Show PREV_SCEN}{Calc}{Quit}

```

```

PREV_SCEN    unnamed
CURR_SCEN    sample

```

DIALOG	Sample1				
-2134376400		4	51	60	176
FONT		8"Helv"			
	4	4	113	24	1000
	130	4	40	14	1
	130	22	40	14	2
	4	28	116	26	1001
END DIALOG					

DIALOG	Sample2				
-2134376400		3	50	60	176
FONT		8"Helv"			
	4	4	110	24	1000
	130	4	40	14	1
	130	22	40	14	2
END DIALOG					

KEEP DATA	CODE	DESCRIPTION
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```

KEEPDATA    {If @Count(SCENARIO_LIST)=@Rows(SCENARIO_LIST)-1}{Branch K_; Stores user-data}
              {Dialog DLG_KEEPPDATA}
              {If RES_KEEPPDATA=0}{Quit}
              {If RES_KEEPPDATA=3}{Branch K_UPDATE}
              {If RES_KEEPPDATA=4}{Branch K_HELP}
              {If @Length(@S(ANS_KEEPPDATA))<1}{Alert "To create a scenario, you must enter a"}
              {If 1-@Iserr(@Scenarioinfo("Creator";@Lower(@Trim(ANS_KEEPPDATA))))}{Branch K_EXI}
              {Scenario-Creat @Lower(@Trim(ANS_KEEPPDATA))}
              {Let RNG_NUM;1}{K_VERSIONS}
              {Put SCENARIO_LIST;0:@Count(SCENARIO_LIST);ANS_KEEPPDATA}
              {Scenario-Show @Lower(@Trim(ANS_KEEPPDATA))}
              {Calc}{Return}

```

```

K_UPDATE    {CLEAN_LIST}{Dialog DLG_UPDDATA}
              {If ANS_UPDDATA<0}{Quit}
              {If RES_UPDDATA=0}{Quit}

```

```
{Scenario-Delete @Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA)))}
{Scenario-Create @Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA)))}
{Let RNG_NUM;1}{UP_EXISTING}
{Scenario-Show @Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA)))}{Calc}{Quit}
```

CLEAN_LIST
CLEAN_LOOP

```
{Blank ANS_SWAPDATA}
{If ANS_SWAPDATA>@Count(UPDATE_LIST)}{Return}
{If 1-@Iserr(@Scenarioinfo("Creator";@Lower(@Trim(@Index(SCENARIO_LIST;0;ANS_S'
{Recalc LIST_RNG}{Edit-Copy +LIST_RNG}{Recalc LIST_ADDR}{Edit-Paste +LIST_ADDF
{Branch CLEAN_LOOP}
```

UP_EXISTING

```
{Let RNG_NAME;+"DATA_"&@Right(@String(RNG_NUM+100;0);2)}
{If 1-@Isrange(@@(RNG_NAME))}{Return}
{Version-Delete +RNG_NAME;@Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA
{Version-Create +RNG_NAME;@Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA
{Scenario-Add-Version @Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA))};+RN
{Let RNG_NUM;RNG_NUM+1}{Branch UP_EXISTING}
```

K_HELP

```
{Dialog DLG_KHELP}
{Branch KEEPDATA}
```

K_LIMIT

```
{Alert +"The maximum number of "&@String(@Count(SCENARIO_LIST);0)&" scenari
{Quit}
```

K_EXISTS

```
{Alert +""""&@Lower(@Trim(ANS_KEEPPDATA))&;"""" already exists. Please use anott
```

K_VERSIONS

```
{Let RNG_NAME;+"DATA_"&@Right(@String(RNG_NUM+100;0);2)}
{If 1-@Isrange(@@(RNG_NAME))}{Return}
{Version-Create +RNG_NAME;@Lower(@Trim(ANS_KEEPPDATA))}
{Scenario-Add-Version @Lower(@Trim(ANS_KEEPPDATA))};+RNG_NAME;@Lower(@Trin
{Let RNG_NUM;RNG_NUM+1}{Branch K_VERSIONS}
```

RNG_NUM
RNG_NAME

9
DATA_09

DLG_KEEPPDATA

DIALOG	KeepData				
-2134376400	8	20	32	196	
FONT	8"Helv"				
4	64	89	12	8001	
148	2	40	14	1	
148	34	40	14	2	
148	18	40	14	3	
148	52	40	14	4	
4	32	128	18	1000	
4	2	130	24	1001	
4	54	114	10	1002	
END DIALOG					

DLG_UPDDATA

DIALOG	Update				
-2134376400	4	54	36	198	

FONT		8"Helv"			
	4	36	104	48	9001
	4	4	113	24	1000
	150	6	40	14	1
	150	22	40	14	2
END DIALOG					

DLG_KHELP

DIALOG	KHELP				
	-2134376400	2	21	32	196
FONT		8"Helv"			
	148	2	40	14	1
	4	2	139	42	1001
END DIALOG					

SWAP DATA	CODE	DESCRIPTION
SWAPDATA	<pre>{CLEAN_LIST}{Dialog DLG_SWAPDATA} {If ANS_SWAPDATA<0}{Quit} {If RES_SWAPDATA=0}{Quit} {If RES_SWAPDATA=3}{Branch DEL_SCENARIO} {Let CURR_SCEN;@Scenariolast(@Cellpointer("Filename"))} {If @Iserr(CURR_SCEN)}{Let CURR_SCEN;"unnamed"} {If CURR_SCEN<>"unnamed"}{UPDATE} {If CURR_SCEN="unnamed"}{UPDUN} {Scenario-Show @Lower(@Trim(@Index(SCENARIO_LIST;0;ANS_SWAPDATA)))} {If @Scenariolast(@Cellpointer("Filename"))<>"-blank-"}{Quit} {Scenario-Delete "unnamed"}{Scenario-Creat "unnamed"} {Let RNG_NUM;1}{UP_UNNAMED}{Scenario-Show "unnamed"}{Calc}{Quit}</pre>	; Switches to a sce
UPDUN	<pre>{Dialog DLG_UPDUN} {If RES_UPDUN=3}{Quit} {If RES_UPDUN=1}{KEEPDATA} {Let RES;1}{Return}</pre>	
UP_UNNAMED	<pre>{Let RNG_NAME;+"DATA_"&@Right(@String(RNG_NUM+100;0);2)} {If 1-@Isrange(@@(RNG_NAME))}{Return} {Version-Delete +RNG_NAME;"unnamed"} {Version-Creat +RNG_NAME;"unnamed"} {Scenario-Add-Version "unnamed";+RNG_NAME;"unnamed"} {Let RNG_NUM;RNG_NUM+1}{Branch UP_UNNAMED}</pre>	
LIST_RNG	#NAME?	
LIST_ADDR	#NAME?	
RES	1	
DEL_SCENARIO	<pre>{If ANS_SWAPDATA<1}{Alert "The scenario named ""-Blank-"" cannot be deleted. Th {Alert +"Delete """"&@Index(SCENARIO_LIST;0;ANS_SWAPDATA)&"""" scenario?";2; {Scenario-Delete @Lower(@Trim(@Index(SCENARIO_LIST;0;ANS_SWAPDATA)))} {Let RNG_NUM;1}{D_VERSIONS} {If ANS_SWAPDATA=@Count(SCENARIO_LIST)-1}{Recalc LIST_ADDR}{Blank +LIST_AI</pre>	


```
{If RES_UPDSC=3}{Quit}
{If RES_UPDSC=1}{UPDATE_POST}
{Return}
```

```
UPDATE_TEST {Let RNG_NAME;"DATA_"&@Right(@String(RNG_NUM+100;0);2)}
{If 1-@Isrange(@@(RNG_NAME))}{Let NO_UPDATE;1}{Return}
{If @Iserr(@Versioncurrent(@@(RNG_NAME)))}{Return}
{Let RNG_NUM;RNG_NUM+1}{Branch UPDATE_TEST}
```

```
UPDATE_POST {Version-Update +RNG_NAME;CURR_SCEN}
UPDATE_LOOP {Let RNG_NUM;RNG_NUM+1}
{Let RNG_NAME;"DATA_"&@Right(@String(RNG_NUM+100;0);2)}
{If 1-@Isrange(@@(RNG_NAME))}{Return}
{If @Iserr(@Versioncurrent(@@(RNG_NAME)))}{Branch UPDATE_POST}
{Branch UPDATE_LOOP}
```

```
NO_UPDATE 1
```

DIALOG	SwapData				
-2134376400		5	53	36	198
FONT		8"Helv"			
4		26	108	58	9001
4		4	124	18	1000
150		6	40	14	1
150		22	40	14	2
150		42	40	14	3
END DIALOG					

DIALOG	Update1				
-2134376400		4	69	49	180
FONT		8"Helv"			
4		5	126	44	1000
135		2	40	14	1
135		18	40	14	2
135		39	40	14	3
END DIALOG					

DIALOG	unnamed				
-2134376400		4	78	60	137
FONT		8"Helv"			
7		3	79	27	1000
92		2	40	14	1
92		18	40	14	2
92		39	40	14	3
END DIALOG					

SHOW MACROS	CODE	DESCRIPTION
MACRO_SHOW	{Show-Sheets MACROS:A1} {Edit-Goto MACROS:A1}{Quit}	; Show / Hide this

MACRO_HIDE {Home}{Hide-Sheets MACROS:A1}
 {Edit-Goto INFORMATION:A1}{Quit}

SHOW NOTES FIELDS	CODE	DESCRIPTION
NOTES_SHOW	{Show-Sheets MACROS:A1} {Edit-Goto NOTES_FIELDS} {Edit-Goto "NOTES FIELDS"}{Quit}	; Navigate to the N

PRINT MACROS	CODE	DESCRIPTION
MACRO_PRINT	{DIALOG DLG_MACPRINT} {IF RES_MACROPRT=0}{Quit} {IF ANS_MACROPRT1}{Set "Print-Range";MACROS_RANGE}{Set "Print-Orientation";"Lar" {IF ANS_MACROPRT2}{Set "Print-Range";NOTES_FIELDS}{Set "Print-Orientation";"Portra" {IF ANS_MACROPRT3}{Set "Print-Range";RN_TABLE_RANGE}{Set "Print-Orientation";"P {SET "Print-Centered";"Horizontal"} {SET "Print-Footer-Center-Text";"^"} {SET "Print-Size";"Fit-Columns"} {SET "Print-Margin-Top";".5"} {SET "Print-Margin-Left";".5"}{SET "Print-Margin-Right";".5"} {SET "Print-Margin-Bottom";".25"} {Print?} {QUIT}	; Print sections of t

DLG_MACPRINT

DIALOG	MacPrint				
-2134376400		5	66	62	152
FONT		8"Helv"			
	8	4	59	10	20
	8	15	72	10	21
	8	26	84	10	22
	102	4	40	14	1
	102	22	40	14	2
END DIALOG					

END OF MACROS

NOTES FIELDS

Information Print

Num_User_Scenarios	0
Current_Scenario	#NAME?
Established_Forecast	
Established_Actual	
New_Forecast	
New_Actual	
Prospective_Expected	
Prospective_Potential	

Information Print

ANS_INFOPRT	C:L89..C:L89
ANS_KEEPPDATA	C:L184..C:L184
ANS_MACROPRT1	C:L370..C:L370
ANS_MACROPRT2	C:L371..C:L371
ANS_MACROPRT3	C:L372..C:L372
ANS_SWAPDATA	C:L315..C:L315
ANS_UPDDATA	C:L197..C:L197
BACKGRND	C:B38..C:B38
BCK_COL	C:B46..C:B46
BCK_LOOP	C:B41..C:B41
CLEAN_LIST	C:B151..C:B151
CLEAN_LOOP	C:B152..C:B152
CURR_SCEN	C:B110..C:B110
DATA_01	B:C4..B:C4
DATA_02	B:H4..B:H4
DATA_03	B:B7..B:B17
DATA_04	B:E7..B:F17
DATA_05	B:B20..B:B25
DATA_06	B:E20..B:F25
DATA_07	B:B28..B:B33
DATA_08	B:F28..B:H33
DEL_SCENARIO	C:B240..C:B240
DLG_INFOPRT	C:B86..C:B86
DLG_KEEPPDATA	C:B181..C:B181
DLG_KHELP	C:B203..C:B203
DLG_MACPRINT	C:B367..C:B367
DLG_PERSONAL	C:B380..C:B380
DLG_SAMPLE1	C:B112..C:B112
DLG_SAMPLE2	C:B121..C:B121
DLG_SWAPDATA	C:B312..C:B312
DLG_UPDDATA	C:B194..C:B194
DLG_UPDSC	C:B322..C:B322
DLG_UPDUN	C:B331..C:B331
D_VERSIONS	C:B249..C:B249

FRM_UPDSC	C:I325..C:I325
INFORMATION	D:A1..D:A1
INFO_ABOUT	D:A329..D:A329
INFO_CONVENTION	D:A225..D:A225
INFO_CURR_PRT	C:B67..C:B67
INFO_LIST	C:B77..C:C82
INFO_NOTESFX	D:A281..D:A281
INFO_OVERVIEW	D:A60..D:A60
INFO_PRINT	C:B49..C:B49
INFO_STEPS	D:A118..D:A118
INFO_TIPS	D:A174..D:A174
INFO_TOPIC	C:B84..C:B84
INF_ABOU_RANGE	D:B331..D:H343
INF_CONVENTION	D:B231..D:H242
INF_NOTE_RANGE	D:B283..D:H293
INF_OVER_RANGE	D:B62..D:H78
INF_STEP_RANGE	D:B120..D:H135
INF_TIPS_RANGE	D:B176..D:H187
KEEPDATA	C:B130..C:B130
K_EXISTS	C:B170..C:B170
K_HELP	C:B164..C:B164
K_LIMIT	C:B167..C:B167
K_UPDATE	C:B143..C:B143
K_VERSIONS	C:B172..C:B172
LIST_ADDR	C:B237..C:B237
LIST_RNG	C:B236..C:B236
MACROS	C:A1..C:A1
MACROS_RANGE	C:A3..C:L397
MACRO_HIDE	C:B344..C:B344
MACRO_PRINT	C:B353..C:B353
MACRO_SHOW	C:B341..C:B341
NOTES_FIELDS	C:A435..C:B442
NOTES_FIELDS	C:A433..C:A433
NOTES_SHOW	C:B348..C:B348
NO_UPDATE	C:B310..C:B310
PERSONALIZE	C:B378..C:B378
PREV_SCEN	C:B109..C:B109
RES	C:B238..C:B238
RES_INFOPRT	C:L87..C:L87
RES_KEEPDATA	C:L182..C:L182
RES_MACROPRT	C:L368..C:L368
RES_SAMPLE1	C:L113..C:L113
RES_SAMPLE2	C:L122..C:L122
RES_SWAPDATA	C:L313..C:L313
RES_UPDDATA	C:L195..C:L195
RES_UPDSC	C:L323..C:L323
RES_UPDUN	C:L332..C:L332
RNG_NAME	C:B179..C:B179
RNG_NUM	C:B178..C:B178
RN_TABLE	C:A480..C:A480
RN_TABLE_RANGE	C:A481..C:B572
SAMPDATA	C:B96..C:B96
SAMP_RESTORE	C:B105..C:B105
SCENARIO_LIST	C:B254..C:B287
SHEET_RANGE	B:B2..B:H37
SHT_PRINT	C:B30..C:B30
SWAPDATA	C:B211..C:B211
TABLE_CONTENTS	A:A1..A:A1

TERRITORY	B:A1..B:A1
UPDATE	C:B289..C:B289
UPDATE_LIST	C:B255..C:B287
UPDATE_LOOP	C:B304..C:B304
UPDATE_POST	C:B303..C:B303
UPDATE_TEST	C:B298..C:B298
UPDUN	C:B224..C:B224
UPPER_LEFT	C:B75..C:B75
UP_EXISTING	C:B157..C:B157
UP_UNNAMED	C:B229..C:B229
ZM_ALL	C:B25..C:B25
ZM_NRML	C:B24..C:B24
ZM_RESTORE	C:B27..C:B27
ZM_SCRN	C:B14..C:B14
ZM_TABLE	C:B16..C:D19
ZOOM_RTN	C:B22..C:B22
ZOOM_TEST	C:B9..C:B9
\0	C:B4..C:B4

me

Notes
Fields

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accordingly

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n the Information sheet

42"	"	"Select Information to Print"			1
1342242800"button"	"Current topic"		0		1
1342242800"button"	"All topics"		0		0
1342373900"button"	"OK"		0		
1342373900"button"	"Cancel"		0		



data, preserving existing entries

58	""	""	"Sample Data"		1
1342177300	"static"	"You can use a s		0	
1342373900	"button"	"OK"		0	
1342373900	"button"	"Cancel"		0	
1342177300	"static"	"currently in this		0	

42	""	""	"Sample Data"		1
1342177300	"static"	"Restore the data		0	
1342373900	"button"	"OK"		0	
1342373900	"button"	"Cancel"		0	



in a scenario

scenario name. Press OK to return to the Keep Data dialog box.">{Branch KEEPDATA}

ISTS}

}

```
WAPDATA)))))){{Let ANS_SWAPDATA;ANS_SWAPDATA+1}{Branch CLEAN_LOOP}  
}}
```

```
}}}
```

```
}}}
```

```
IG_NAME:@Lower(@Trim(@Index(UPDATE_LIST;0;ANS_UPDDATA))))}
```

ios is in use. You must delete a scenario before creating a new one."}

er scenario name."}{Branch KEEPDATA}

```
n(ANS_KEEPPDATA))}
```

82	"	"	"Keep Data"		0
1350762600	"edit"	"		0	
1342373900	"button"	"OK"		0	
1342373900	"button"	"Cancel"		0	
1342373900	"button"	"Update..."		0	
1342373900	"button"	"Help"		0	
1342177300	"static"	"You can create i		0	
1342177300	"static"	"This SmartMast		0	
1342177300	"static"	"Enter a name fo		0	

88	"	"	"Update"		0

1352728600	"listbox"	""		0	UPDATE_LIST
1342177300	"static"	"Select the scen		0	
1342373900	"button"	"OK"		0	
1342373900	"button"	"Cancel"		0	

50	""	""	"Keep Data Help"		1
1342373900	"button"	"OK"		0	
1342177300	"static"	For more informa		0	



Scenario selected by the user

is scenario is used to clear data from the SmartMaster and create a blank, unnamed scenario."}{Branch SWAPDATA}
 "Stop";RES){If 1-RES){Quit}

DDR){Quit}

ATA)))}

insert as many rows as you like.

88	""	""	"Swap Data"		0
1352728600	"listbox"	""		0	SCENARIO_LIST
1342177300	"static"	"Select the scen		0	
1342373900	"button"	"OK"		0	
1342373900	"button"	"Cancel"		0	
1342373900	"button"	"Delete"		0	

58	""	""	"Update Scenario"		0
1342177300	"static"	"The scenario nar		0	
1342373900	"button"	"Yes"		0	
1342373900	"button"	"No"		0	
1342373900	"button"	"Cancel"		0	

58	""	""	"Update Scenario"		1
1342177300	"static"	"The current sce		0	
1342373900	"button"	"Yes"		0	
1342373900	"button"	"No"		0	
1342373900	"button"	"Cancel"		0	





Notes/FX fields



the macro sheet

landscape"}
it"}
portrait"}
}

	42"	"	"Select Information to Print"		1
	1342242800	"button"	"Macros"	0	0
	1342242800	"button"	"Notes Fields"	0	0
	1342242800	"button"	"Range Name Ta	0	1
	1342373900	"button"	"OK"	0	
	1342373900	"button"	"Cancel"	0	



Return to
Macros

Return to
Macros

RES_SWAPDATA

ANS_SWAPDATA

Information

Index

Go to Ter:
Sales

Click a button to go to a subject.

<i>Subject</i>	<i>Description</i>
> Overview	General information about this SmartMaster.
> Steps	Procedures to use this SmartMaster.
> Tips	Helpful hints for using this SmartMaster.
> Conventions	Details on conventions used in this SmartMaster.
> Notes/FX Enabling	Description of Notes/FX and available fields.
> Macros	Individual macro commands and their descriptions used in this SmartMaster.
> About	Information about the developer of this SmartMaster.

territory Sales Plan SmartMaster

The Territory Sales Plan SmartMaster projects a bottom-up forecast or plan. Territory managers use this template to communicate local sales plans to corporate headquarters. It is designed to be used at the beginning of a sales year.

The SmartMaster is broken down so that the user can enter forecasted sales for three categories:

Established customers

New customers

A customer that has made their first purchase in the past year.

Prospective customers

A customer that has not yet purchased from your company.

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Sales Index

territory Sales Plan SmartMaster

1. Enter the forecasted and actual sales information for established and new customers.
2. Under prospective customers, enter the following:
 - Close Quarter
The quarter in which you expect the account to be closed.
 - Probability
The expected probability of closing the account.
 - Annual Potential
The annual potential sales.

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Sales Index

Tips

The expected value of prospective customers is calculated by multiplying the annual potential probability of closing the account by the remaining number of quarters in the year, so choose values carefully.

For example, if the annual potential sales to ABC Company are \$20,000 with a 70% probability in the second quarter, the expected value of ABC is \$10,500. The associated formula is detailed below.

`@IF(20000,@ROUND(+20000*.70*((5-2)/4),0),"") = 10500`



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Conventions

Cell Types

Shaded cells are data entry areas. Outlined cells contain formulas that are automatically

Printing

All forms print in portrait orientation.

Dates

Enter the date as MM/DD/YY.

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SmartMaster with Notes/FX

Notes/FX lets you exchange data between applications by embedding the data as an object in a spreadsheet. In 1-2-3, the range called "Notes Fields" can be made available to Notes for exchanging data between Notes and the spreadsheet.

This SmartMaster contains fields that can be used for Notes/FX applications. To see the range

"Notes Fields," click on the Notes Fields button. For more information about using Notes/FX, see documentation.

[Return to Territory Information Index](#)

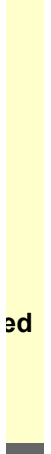
this SmartMaster

This SmartMaster was developed by KMT Software, Inc. KMT Software is the developer of add-on products that are marketed under the Lotus name through Lotus Selects. KMT Software worked closely with Lotus to develop the Lotus SmartMaster Collection for 1-2-3 Release 5, a

collection of dozens of additional SmartMaster templates. The Lotus SmartMaster Collection for 1-2-3 Release 5 includes SmartMaster templates to help you manage your business as well as personal planning and finances.

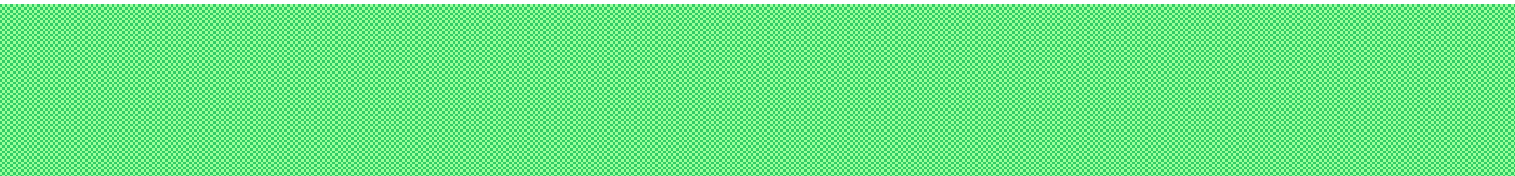
To order or learn more about the Lotus SmartMaster Collection for 1-2-3 Release 5, in the U.S. call Lotus Selects at 1-800-635-6887. In Canada, call 1-800-GO-LOTUS.

ritory



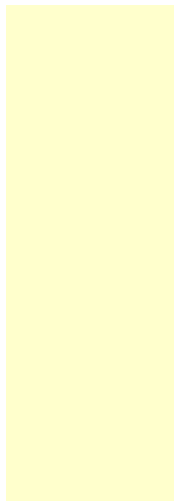
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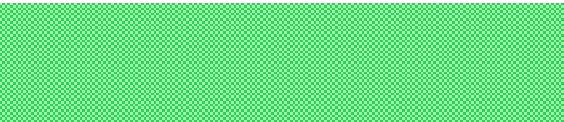
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