

REPORTS &
DASHBOARDS

Orientation

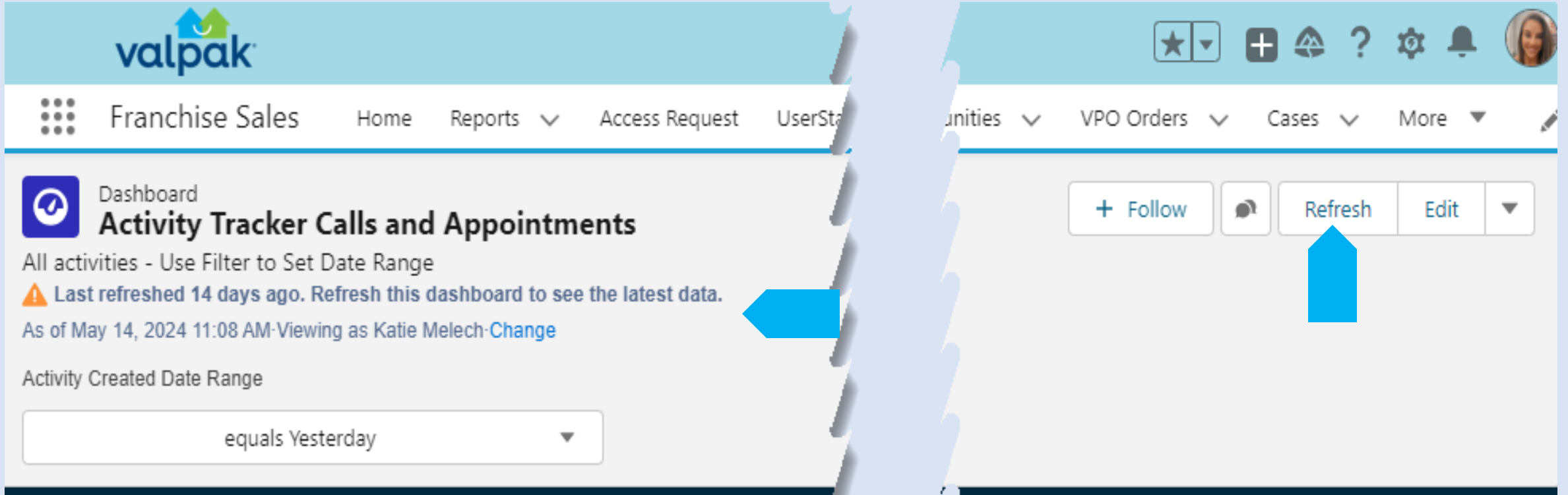
AGENDA



1. DASHBOARD TIPS
2. ACTIVITY TRACKER
3. SALES LENS
4. CHARGENT REP DASHBOARD
5. COMMISSION DASHBOARD
8. CASES
9. CASE DASHBOARD

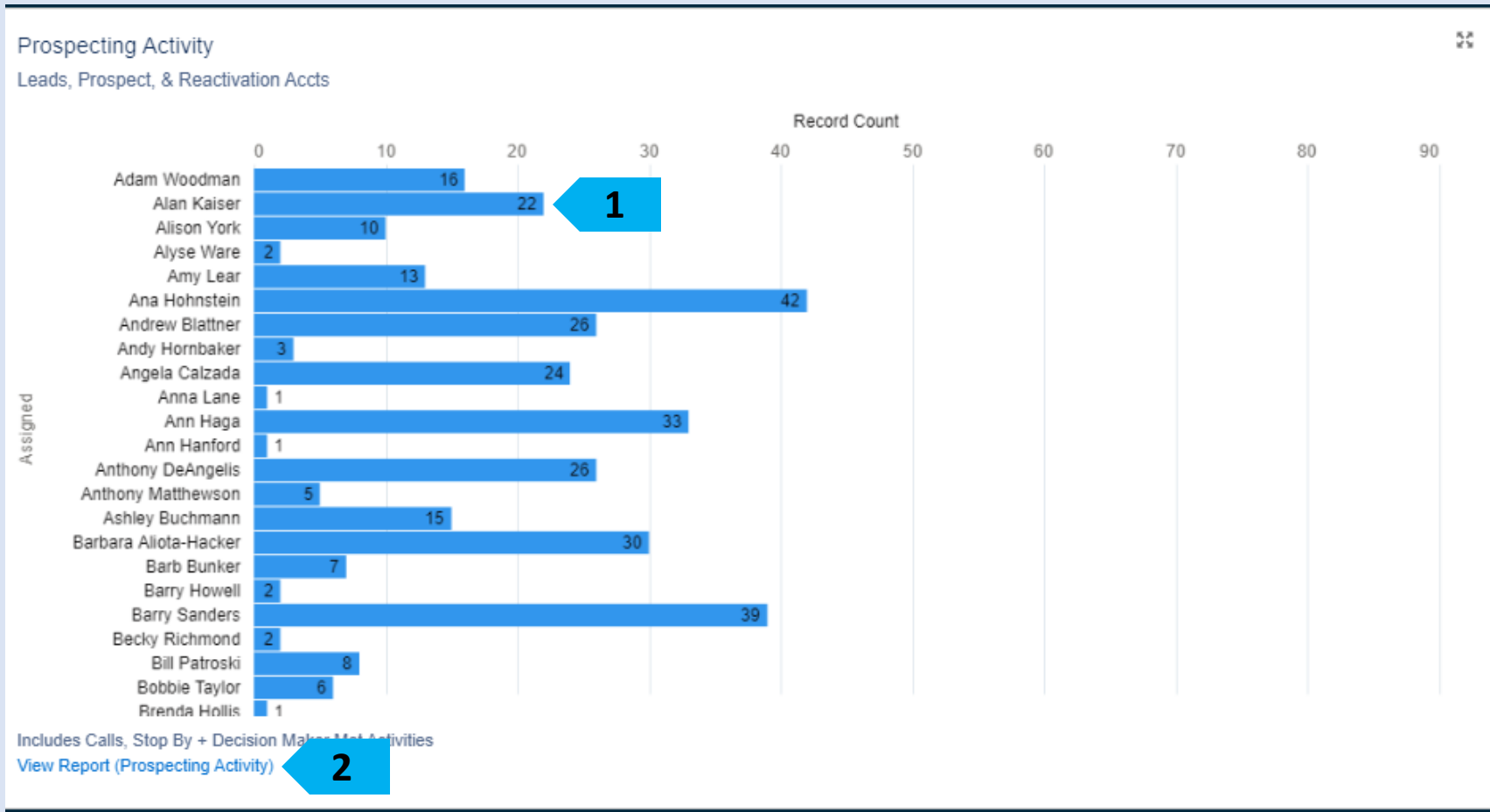
DASHBOARD TIPS

REFRESH

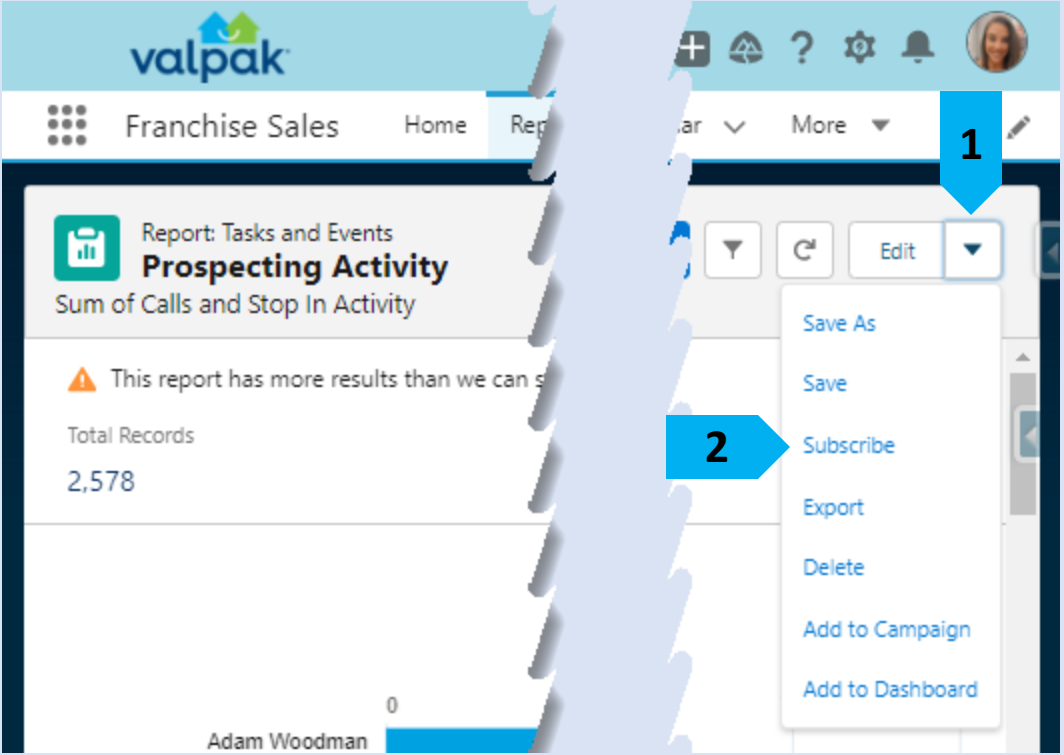


****Always click Refresh when you open a Dashboard. You can see on the left-hand side when the last time data was pulled into the Dashboard.****

REPORT LINKS



SUBSCRIBE



The 'Edit Subscription' form is shown with the following settings:

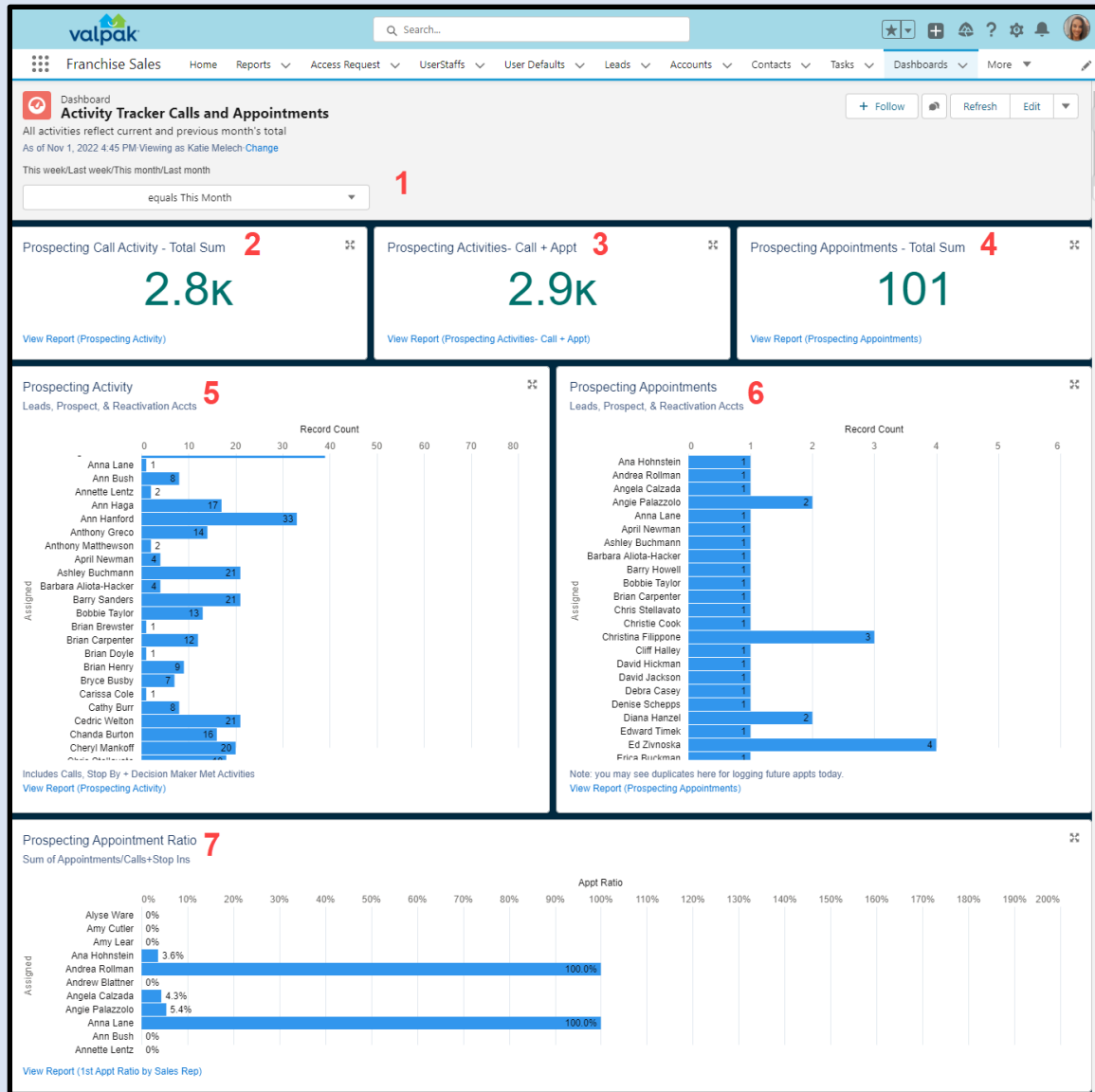
- Settings**
- Frequency:** Daily, Weekly (selected), Monthly
- Days:** Sun, Mon, Tue, Wed (selected), Thu, Fri, Sat
- Time:** 10:00 AM
- Attachment:** Attach File
- Recipients:** Send email to Me, Edit Recipients
- Run Report As:** Me (selected), Another Person
- Conditions:** Add conditions to this report (checkbox is unchecked)

At the bottom right, there are 'Cancel' and 'Save' buttons.

****On the Report, click the drop down and select Subscribe. Choose you settings and click Save.****

ACTIVITY TRACKER DASHBOARD

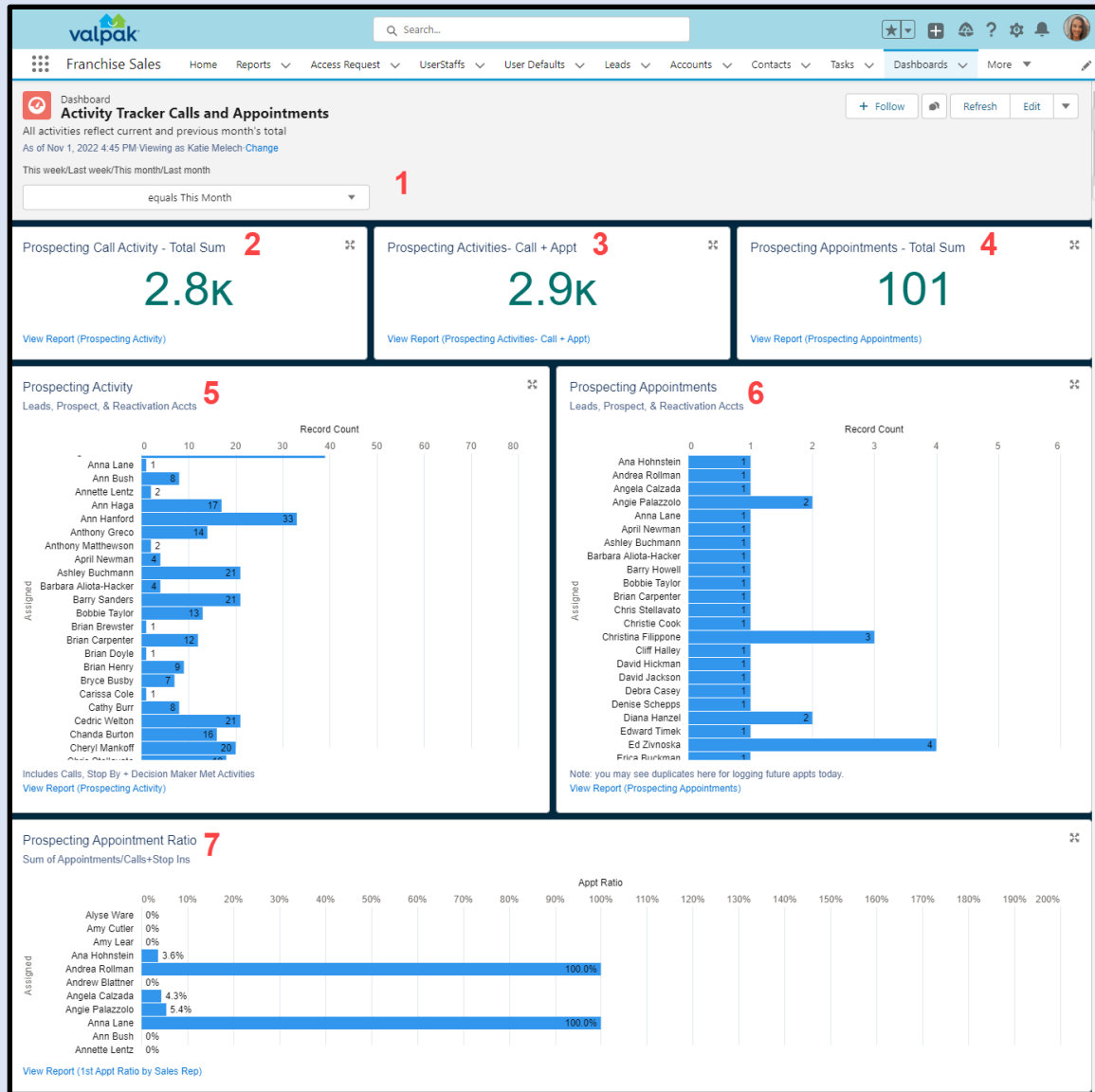
ACTIVITY TRACKER



Questions the dashboard helps answer:

- How many calls and appointment is my rep setting?
- What is their call to appointment conversion ratio so I can identify coaching opportunities?
- How many calls and appointments are being logged in my market?
- Are there any funded leads not getting attention?
- How many calls and appointments are with existing clients? Which clients are they meeting with so I can coach on upsell opportunities?

ACTIVITY TRACKER



Main Sections

Prospecting Activity

- Calls and Appointments at the Rep Level
- Calls and Appointments at the Market Level
- Prospecting Ratio
- Prospecting Emails Sent

Funded Leads

- Leads for Follow Up
- Prospect Accounts for Follow Up

Existing Clients

- Client Activity
- Client Calls and Appointments at the Rep Level
- Client Calls and Appointment at the Market Level

SALES LENS

SALES LENS

Questions the dashboard helps answer:

The dashboard displays the following sections and data:

Control Panel: Franchise: Atlanta [3131], Account Owner: Select User Staff, Product Group: All. Buttons: Refresh, Copy.

In Progress:

Account	Ext Id	Churn%	Start Date	Quote	Line#	Sub Prods	Status	Product	Deal Name	Qty	Amount	Per NTA	Commission	Promotion	Sales Rep
Aire Serv Fayettevil		55.61	01/12/24	Q-427860	2	L...D C_	Client Review	CP44		4-φ	\$832.00	\$208.00	\$0.00	Standard	Suzanne Touchstone
Alvarado Painting LL			01/12/24	Q-428241	20	L...D C_	Client Review	CP44		2-φ	\$612.02	\$300.45	\$0.00	Standard	David Hickman
Anything Residential			01/05/24	Q-437732	7	.....P	Client Review	Wrapper_SOLO		500	\$476.25		\$0.00	Standard	George Rittelmeyer
Anything Residential			01/05/24	Q-437732	11	.....P	Client Review	SOLO_Valpak_List		1	\$0.00		\$0.00	Standard	George Rittelmeyer
Atami Grill & Sushi		64.29	01/12/24	Q-436445	2	L...D...	Draft	CP44		3-φ	\$693.00	\$231.00	\$0.00	Dining	Mark Chambers

Accepted Sales:

Account	Ext Id	Churn%	Start Date	Contract	Sub Prods	Product	Deal Name	Qty	Amount	Per NTA	Commission	Promotion	Sales Rep
21 SMOKE VAPE & CBD-	313111258		01/12/24	00167187	L...D...	CP44		5-φ	\$526.23	\$103.33	\$0.00	Entertainment/Retail	George Rittelmeyer
21 SMOKE VAPE & CBD-	313111256		01/12/24	00167157	L...D...	CP44		5	\$526.23	\$103.33	\$0.00	Entertainment/Retail	George Rittelmeyer
21 SMOKE VAPE & CBD-	313111257		01/12/24	00167189	L...D...	CP44		5	\$526.23	\$103.33	\$0.00	Entertainment/Retail	George Rittelmeyer
A WHITE-MEADOWS TREE	313110261	0.01	01/12/24	00168092	L...D...	CP44		1-φ	\$267.50	\$262.64	\$0.00	Standard	Suzanne Touchstone
A-TEAM SERVICES -ACK	313108039	0.02	01/12/24	00164278	L.....	CP40		12-φ	\$3,978.62	\$325.53	\$0.00	Standard	David Hickman
ALL GOOD FLOORS & SU	313108779	0.02	01/12/24	00169847	L.....P	DAP44-C		1-φ	\$2,550.00	\$1,450.00	\$0.00	Standard	David Hickman

VPO Orders:

Account	Ext Id	Churn%	Start Date	VPO Order	Ord Status	Graphic	Product	Ver Name	Quantity	Sales Rep
A WHITE-MEADOWS TREE	313110261	0.01	01/12/24	3131086134	Active [A]	-	CP44		10,000	Suzanne Touchstone
A WHITE-MEADOWS TREE	313110261	0.01	01/12/24	3131086135	Active [A]	-	CP44	V1	10,000	Suzanne Touchstone
MR. HANDYMAN-MUTUALI	313110527	0.83	01/12/24	3131084797	Cancelled [C]	-	CP44		0	Suzanne Touchstone
MR. HANDYMAN-MUTUALI	313110527	0.83	01/12/24	3131084798	Cancelled [C]	-	CP44		0	Suzanne Touchstone
MR. HANDYMAN-MUTUALI	313110527	0.83	01/12/24	3131084827	Cancelled [C]	-	CP44		0	Suzanne Touchstone
MR. HANDYMAN-MUTUALI	313110527	0.83	01/12/24	3131084828	Cancelled [C]	-	CP44		0	Suzanne Touchstone

- What is the status of a quote? What are the proposal details?
- What is already Closed Won for this mailing?
- What is the status of the creative?
- Are there any clients that we need to get renewed?
- Did someone mail last month or same mailing last year but not mailing this month?
- Which opportunities are closing soon but do not have a quote in progress?

SALES LENS

The screenshot displays the Valpak CRM interface with the following sections:

- Control Panel:** Franchise: Atlanta [3131], Account Owner: Select User Staff, Product Group: All. Includes Refresh and Copy buttons.
- In Progress:** A table listing deals in progress with columns for Account, Ext Id, Churn%, Start Date, Quote, Line#, Sub Prods, Status, Product, Deal Name, Qty, Amount, Per NTA, Commission, Promotion, and Sales Rep.

Account	Ext Id	Churn%	Start Date	Quote	Line#	Sub Prods	Status	Product	Deal Name	Qty	Amount	Per NTA	Commission	Promotion	Sales Rep
Aire Serv Fayetteville		55.61	01/12/24	Q-427860	2	L...D C_	Client Review	CP44		4	\$832.00	\$208.00	\$0.00	Standard	Suzanne Touchstone
Alvarado Painting LL			01/12/24	Q-428241	20	L...D C_	Client Review	CP44		2	\$612.02	\$300.45	\$0.00	Standard	David Hickman
Anything Residential			01/05/24	Q-437732	7	.....P	Client Review	Wrapper_SOLO		500	\$476.25		\$0.00	Standard	George Rittelmeier
Anything Residential			01/05/24	Q-437732	11	.....P	Client Review	SOLO_Valpak_List		1	\$0.00		\$0.00	Standard	George Rittelmeier
Atami Grill & Sushi		64.29	01/12/24	Q-436445	2	L...D...	Draft	CP44		3	\$693.00	\$231.00	\$0.00	Dining	Mark Chambers
- Accepted Sales:** A table listing accepted sales with columns for Account, Ext Id, Churn%, Start Date, Contract, Sub Prods, Product, Deal Name, Qty, Amount, Per NTA, Commission, Promotion, and Sales Rep.

Account	Ext Id	Churn%	Start Date	Contract	Sub Prods	Product	Deal Name	Qty	Amount	Per NTA	Commission	Promotion	Sales Rep	
UNLIMITED LAWN CARE	313110499	0.02	01/12/24	Q-425181	2	...D C_	Draft	CP44	9	\$1,665.00	\$185.00	\$0.00	Standard	Brenda Hollis
Up Down Garage Doors			01/12/24	Q-439918	8	L...D C_	Manager Review	CP44	2	\$390.73	\$290.00	\$0.00	Standard	George Rittelmeier
- VPO Orders:** A table listing VPO orders with columns for Account, Ext Id, Churn%, Start Date, VPO Order, Ord Status, Graphic, Product, Ver Name, Quantity, and Sales Rep.

Account	Ext Id	Churn%	Start Date	VPO Order	Ord Status	Graphic	Product	Ver Name	Quantity	Sales Rep				
ZEROREZ THE WOODSHOP	313111106	0.01	12/21/23	00139513	...	CP44			29	\$4,814.46	\$163.00	\$0.00	Standard	Brenda Hollis
ZEROREZ THE WOODSHOP	313111112	0.01	12/21/23	00139775	...	CP44			5	\$830.08	\$163.00	\$0.00	Standard	Brenda Hollis

Main Sections – sort by Market, Rep, Product

In Progress

- Quotes in Draft, Out for Client Review, or Approved
- Details: start date, products, distribution, and rate

Accepted Sales

- Closed Won Quotes
- Details: start date, products, distribution, and rate

VPO Orders

- Order ID and Graphic Status

Renewable Contracts

- Contracts ending and not renewed

Potential Sales

- Previous Month or SMLY with no sales in current month


Opportunity Pipeline

- Closing Soon with no associated quotes

SALES LENS GUIDE

1

Sub Prods	Status	Product	Deal Name
L ___ D C _	Client Review	CP44	
L ___ D C _	Client Review	CP44	




Qty	
5 	Distribution 00167187
5	01/12/24=> Atlanta[Local] 676214 [5] : KS LM PO TE WM
5	

Cancel

1. Hover over Sub Products to get a break down of what the letters stand for
2. Click the tri arrow icon to get quick access to the NTA's that are mailing that month

SALES LENS GUIDE CONT.

3. To view the Graphic, under Accepted Sales, click the 3 lines next to the Product and then click the graphic link.

Product
CP44  3
CP44 
CP44 

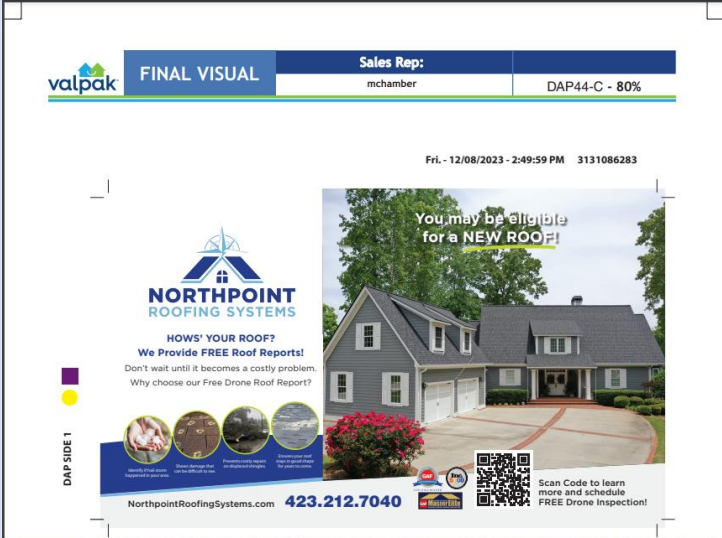
VPO Orders - 00139513 : ZEROREZ THE WOODSHOP

Order	Product	Graphic	Qty	EMD	Bill Dt	Version
3131081661-1	CP44	RFO	290,000	12/21/23	01/12/24	V1

Cancel

4. OR Under VPO Orders, click on RFO or PPO to open the graphic in a new tab.

Graphic
RFO 4
-
-
-
-



valpak FINAL VISUAL Sales Rep: mchamber DAP44-C - 80%

Fri. - 12/08/2023 - 2:49:59 PM 3131086283

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CHARGENT REP DASHBOARD

CHARGENT REP DASHBOARD: WORK

The screenshot shows the Valpak Chargent Rep dashboard. The top navigation bar includes 'Franchise Sales', 'Home', 'Reports', 'Access Request', 'User Staffs', 'User Defaults', 'Leads', 'Accounts', 'Contracts', 'Dashboards', 'Chatter', 'Tasks', 'Quotes', 'Approvers', 'Opportunities', 'VPO Orders', 'Cases', 'Sales Lens', 'Calendar', and 'More'. The dashboard title is 'Chargent Rep' with a subtitle 'Daily Chargent Work and Info - Make sure you click REFRESH for latest data'. The main content area is divided into two sections:

Work: Payment Request Pending Rep Action

Account: Account Name ↑	Contract: Contract Number	Contract: Contract Start Date	Contract: Contract End Date	Contract: Contract Term (months)	Request Source	Payment Request Name	Recurring Charge Amount	Link Expiration Date
Dunder Mifflin	00123456	3/23/2024	7/23/2024		4 Auto Contract Initial	123456789-123456	USD 1.58k	4/5/2024 3:04 PM
Dunder Mifflin	00123456	2/22/2024	4/22/2024		2 Auto Contract Additional	123456789-123456	USD 0.00	4/7/2024 8:39 AM
Dunder Mifflin	00123456	12/28/2023	3/28/2024		3 Auto Contract Additional	123456789-123456	USD 0.00	4/4/2024 8:36 AM
Dunder Mifflin	00123456	12/28/2023	1/28/2025		13 Auto Contract Additional	123456789-123456	USD 3.45k	5/1/2024 8:50 AM
Dunder Mifflin	00123456	5/7/2024	12/7/2024		7 Auto Contract Additional	123456789-123456	USD 2.64k	4/27/2024 8:50 AM
Dunder Mifflin	00123456	12/28/2023	2/28/2025		14 Auto Contract Additional	123456789-123456	USD 4.71k	5/1/2024 8:35 AM
Dunder Mifflin	00123456	12/28/2023	1/28/2025		13 Auto Contract Additional	123456789-123456	USD 4.88k	4/8/2024 8:46 AM

Work: AR Invoice Aging

Account Name ↑	Account Ent ID	Current Balance	31-60 Days Balance	61-90 Days Balance	91+ Days Balance	Total Balance Due	Last Payment Date	Last Dunning 90+	Last Dunning Final
Dunder Mifflin	123405678	USD 1,376.99	USD 1,376.99	USD 0.00	USD 0.00	USD 3,153.88	3/2/2024	-	-
Dunder Mifflin	123405678	USD 3,451.40	USD 3,451.40	USD 0.00	USD 0.00	USD 10,354.20	3/15/2024	-	-
Dunder Mifflin	123405678	USD 14,395.48	USD 0.00	USD 0.00	USD 0.00	USD 14,395.48	2/27/2024	-	-
Dunder Mifflin	123405678	USD 3,300.00	USD 0.00	USD 0.00	USD 0.00	USD 3,300.00	3/8/2024	-	-
Dunder Mifflin	123405678	USD 2,600.00	USD 0.00	USD 0.00	USD 0.00	USD 2,600.00	-	-	-
Dunder Mifflin	123405678	USD 690.54	USD 8,340.54	USD 0.00	USD 0.00	USD 9,031.08	3/8/2024	-	-
Dunder Mifflin	123405678	USD 1,304.70	USD 0.00	USD 0.00	USD 0.00	USD 1,304.70	3/13/2024	-	-

Questions the dashboard helps answer:

- Which clients do I need to get payment from?
- Which clients are past due?
- Who do I need to get a new credit card from?
- Which payments is billing still working on?
- When will my client be charged next?
- Which client needs to send their payment info?
- When will my client be charged next?
- When was my client last charged?
- Which clients' payments are on hold for a specific reason?
- Which invoice was payment applied?

CHARGENT REP DASHBOARD: WORK

The screenshot shows the Valpak Chargent Rep dashboard. The top navigation bar includes Franchise Sales, Home, Reports, Access Request, User Staffs, User Defaults, Leads, Accounts, Contacts, Dashboards, Chatter, Tasks, Quotes, Approvers, Opportunities, VPO Orders, Cases, Sales Lens, Calendar, and More. The dashboard title is 'Chargent Rep' with a sub-header 'Daily Chargent Work and Info - Make sure you click REFRESH for latest data'. The date is 'As of Apr 2, 2024 9:23 AM Viewing as Andy Riesch Change'.

Work: Payment Request Pending Rep Action

Account: Account Name ↑	Contract: Contract Number	Contract: Contract Start Date	Contract End Date	Contract: Contract Term (months)	Request Source	Payment Request Name	Recurring Charge Amount	Link Expiration Date
Dunder Mifflin	00123456	3/23/2024	7/23/2024		4 Auto Contract Initial	123456789-123456	USD 1.58k	4/5/2024 3:04 PM
Dunder Mifflin	00123456	2/22/2024	4/22/2024		2 Auto Contract Additional	123456789-123456	USD 0.00	4/7/2024 8:39 AM
Dunder Mifflin	00123456	12/28/2023	3/28/2024		3 Auto Contract Additional	123456789-123456	USD 0.00	4/4/2024 8:36 AM
Dunder Mifflin	00123456	12/28/2023	1/28/2025		13 Auto Contract Additional	123456789-123456	USD 3.45k	5/1/2024 8:50 AM
Dunder Mifflin	00123456	5/7/2024	12/7/2024		7 Auto Contract Additional	123456789-123456	USD 2.64k	4/27/2024 8:50 AM
Dunder Mifflin	00123456	12/28/2023	2/28/2025		14 Auto Contract Additional	123456789-123456	USD 4.71k	5/1/2024 8:35 AM
Dunder Mifflin	00123456	12/28/2023	1/28/2025		13 Auto Contract Additional	123456789-123456	USD 4.86k	4/8/2024 8:46 AM

[View Report \(Payment Consent Pending Rep Action Rep\)](#)

Work: AR Invoice Aging

Account Name ↑	Account Site ID	Current Balance	31-60 Days Balance	61-90 Days Balance	91+ Days Balance	Total Balance Due	Last Payment Date	Last Dunning 90+	Last Dunning Final
Dunder Mifflin	123405678	USD 1,576.99	USD 1,576.99	USD 0.00	USD 0.00	USD 3,153.98	3/2/2024	-	-
Dunder Mifflin	123405678	USD 3,451.40	USD 3,451.40	USD 3,451.40	USD 0.00	USD 10,354.20	3/15/2024	-	-
Dunder Mifflin	123405678	USD 14,995.48	USD 0.00	USD 0.00	USD 0.00	USD 14,995.48	2/27/2024	-	-
Dunder Mifflin	123405678	USD 3,500.00	USD 0.00	USD 0.00	USD 0.00	USD 3,500.00	3/8/2024	-	-
Dunder Mifflin	123405678	USD 2,600.00	USD 0.00	USD 0.00	USD 0.00	USD 2,600.00	-	-	-
Dunder Mifflin	123405678	USD 690.54	USD 8,340.54	USD 0.00	USD 0.00	USD 9,031.08	3/6/2024	-	-
Dunder Mifflin	123405678	USD 1,304.70	USD 0.00	USD 0.00	USD 0.00	USD 1,304.70	3/13/2024	-	-

[View Report \(AR Invoice Aging Rep\)](#)

Main Sections

Rep Needs to Take Action

- Payment Request Pending Rep Action
- AR Invoice Aging
- Credit Cards Expiring Next 60 Days with Recurring
- Account Last Transaction is Error

Rep Needs to Monitor

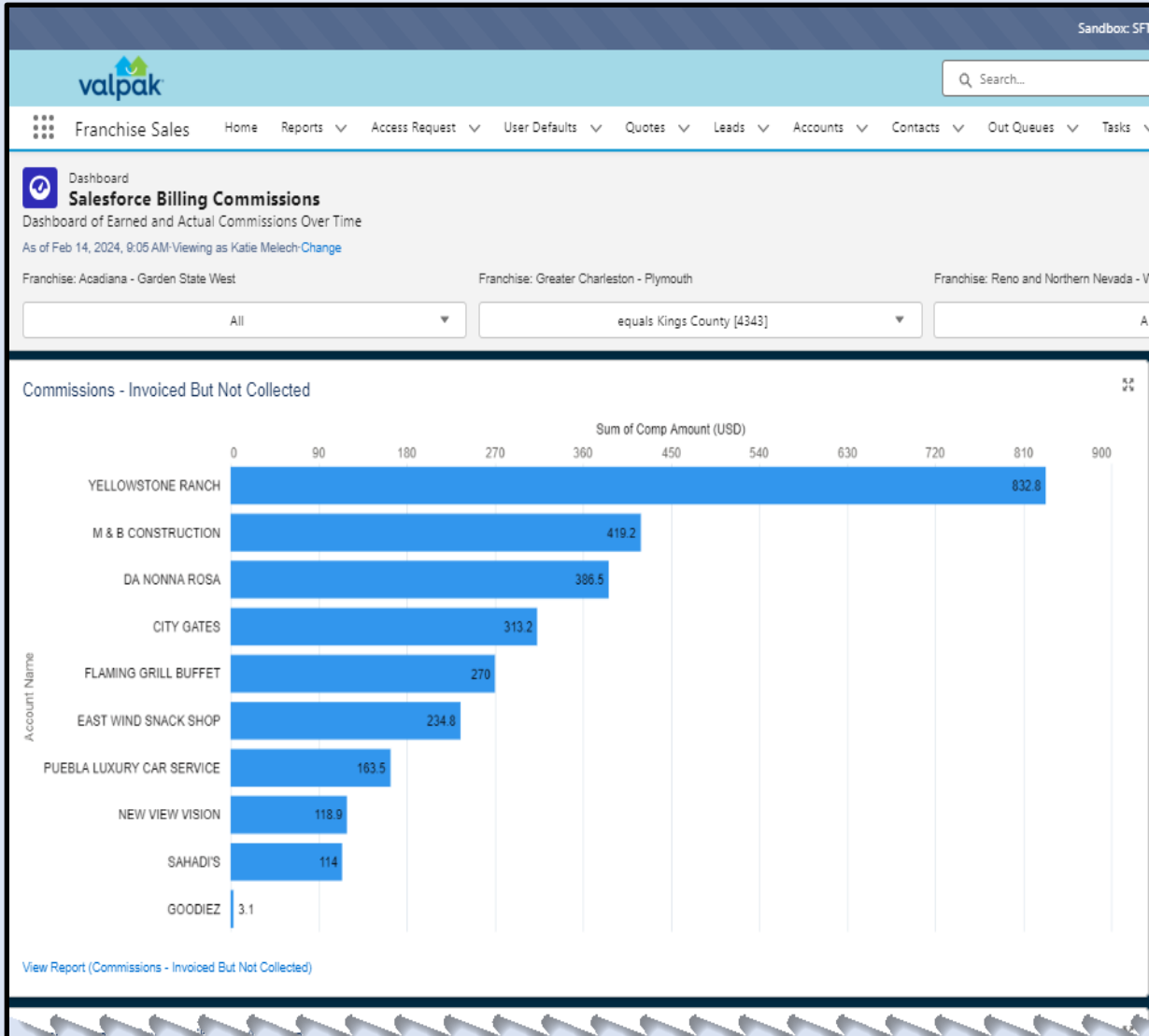
- Automated Recurring Errors
- Scheduled Recurring next 30 days
- Payment Consent Request Pending Client

Rep Nice To Know Information

- Payments Scheduled in Next 30 Days
 - Last Transactions in past 30 days, 7 days, or 1 day
 - Consents on Hold
- Billing Setting Up the Payment Schedule

COMMISSION DASHBOARD

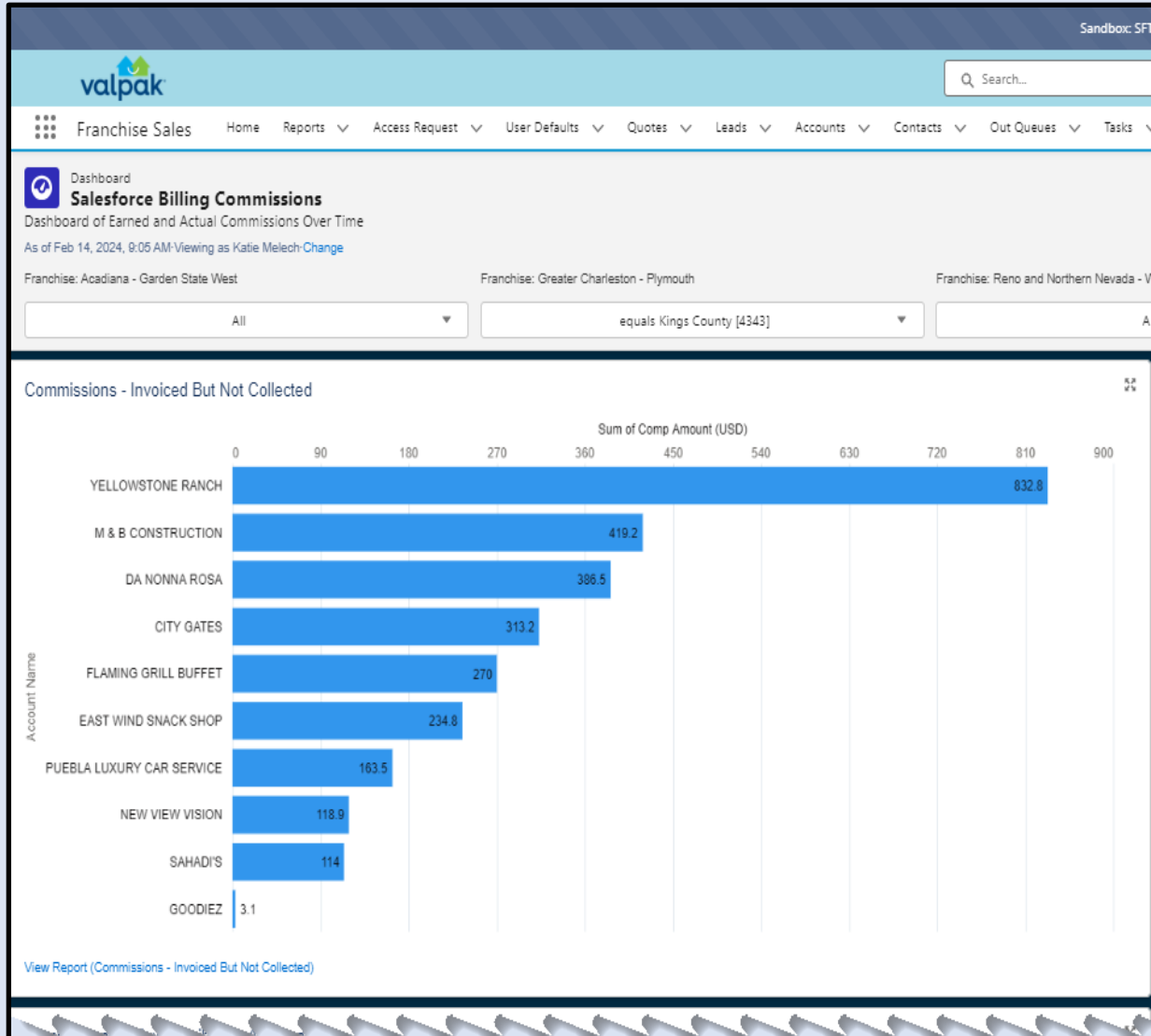
COMMISSIONS DASHBOARD



Questions the dashboard helps answer:

- Which clients need to pay and how much will the rep earn?
- How much in commission has the rep earned in 2024?
- Where is the process are commissions? Do I need to approve anything?
- What will appear in the rep's paycheck?

COMMISSIONS DASHBOARD



Main Sections

Commissions – Rep Takes Action

- Commissions – Invoiced but not collected

Commissions - Informational

- Automated Recurring Errors
- Scheduled Recurring next 30 days
- Payment Consent Request Pending Client
- Commissions in Approval Process
 - Manager/RSA
 - GM
 - Payroll
- Last Export (What's in Paycheck)

CASES

WHY CREATE A CASE?

Cases help you in a few different ways:

- Easy to submit requests for different types of support all within one platform, so you won't have to keep track of multiple department emails or contacts.
- Keeps all related information and files together to avoid searching for past email chains or multiple email threads – the info is all right there on the case record.
- Traffics requests to the right team for faster resolution.
- Communications can happen directly with the subject matter experts.

CREATE A BILLING CASE

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Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Allison's Sports Center

+ Follow New Task Launch Quick C

SHOW ALL (24)

We found no potential duplicates of this Account.

Details **Support** 1 Dates Statement AR Sales Locations Feed

Quick Case Create

*Category 2

Operations

Billing

Artwork

Data

*Type 3

Billing - Other

Product

--None--

*Subject 4

Billing Case

Case Opened On Behalf Of ⓘ

Search People...

5 Next

On the Account record, click on Support. Choose your Category, select a Type and fill in any additional fields that are available. Click Next.

CREATE A BILLING CASE

The screenshot shows the Valpak CRM interface. At the top, there is a search bar and a navigation menu with options like Franchise Sales, Home, Reports, Access Request, User Defaults, Quotes, Leads, Accounts, Contacts, Out Queues, Tasks, and Chatter. Below the navigation, the account name 'Allison's Sports Center' is displayed. The main content area has tabs for Details, Support, Billing Dates, Statement, AR, Sales, Locations, and Feed. The 'Support' tab is active, and the 'Quick Case Create' form is shown. The form includes a 'Compose text' section with a rich text editor toolbar and a text area containing the text 'Details for the Billing team added here'. A blue arrow labeled '1' points to the text area. Below the text area, there is a warning message: 'Warning! Details will clear if navigate to previous screen. Save copy of text outside of case create before clicking Previous button to avoid losing work.' At the bottom right, there is a 'Next' button with a blue arrow labeled '2' pointing to it.

Add notes for the team that you are creating the case for so that they have information on what they need to assist with. Click Next.

CREATE A BILLING CASE

The screenshot shows the Valpak software interface. At the top, there is a search bar and a navigation menu with items like Franchise Sales, Home, Reports, Access Request, User Defaults, Quotes, Leads, Accounts, Contacts, Out Queues, Tasks, and Chatter. Below this, the account name 'Allison's Sports Center' is displayed. The main content area has tabs for Details, Support, Billing Dates, Statement, AR, Sales, Locations, and Feed. The 'Support' tab is active, and the 'Quick Case Create' section is visible. In this section, there is an 'Upload Files' button with an upward arrow icon and a dashed box containing the text 'Or drop files'. A blue arrow with the number '1' points to the 'Upload Files' button. At the bottom right of the 'Quick Case Create' section, there is a blue arrow with the number '2' pointing to a 'Next' button.

Upload any files you have associated to this case and click Next.

CREATE A BILLING CASE

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Search...

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter

Account Allison's Sports Center + Follow New Task Launch Quick

Details **Support** Billing Dates Statement AR Sales Locations Feed

Quick Case Create

[Case](#) created successfully. Navigate to the case to make edits or upload additional files.

1

Finish

Click on Case to go to the Case record page you just created.
You can always find your Cases on the Account under the related links section.

valpak

Search...

Franchise Sales Home Reports Access Request User Defaults Quotes Leads Accounts Contacts Out Queues Tasks Chatter Dashboards Approvers Opportunities VPO Orders More

Account Allison's Sports Center + Follow New Task Launch Quick Opportunity Quick Quote A/R Balance Create VPO Client Change Owner

Type	VPO Status	Phone	Category	Account Ext ID	Total Balance Due
Client		(727) 201-6786	Entertainment / Recreation / Leisure [3]		USD 0.00

Contacts (1) Cases (5) Opportunities (2) Quotes (2) Contracts (1) Orders (1) Chargent Orders (1) Transactions (0) Chargent Payment Requ...
Payment Consents (0) VPO Orders (Print Acco... VPO Orders (Digital Acc... Invoices (0) Credit Notes (0) Debit Notes (0) Payments (0) Refunds (0) Files (0)

Show All (24)

CASES DASHBOARD

CASE DASHBOARD

valpak

Search...

Franchise Sales Home Reports Access Request UserStaffs User Defaults Leads Accounts Contacts

Dashboard
Franchise Support Cases: Reps
Rep Support Case Work - Make sure you click REFRESH for latest data
As of Jul 2, 2024 9:48 AM Viewing as Aaron Rockwell Change
Case Type - Use "All" to View Deactivated Types
All

Work: My Cases Pending Reply

Case Num...	Case Owner	Account Name	Case Record Ty...	Type	Subject	Case Last Modified Date
00355974	Aaron Rockwell	SKY ZONE COVINA	AD Request	Artwork - Ad Request	Ad Request	7/13/20
00386914	Aaron Rockwell	PLAZA AUTO CARE CENTER	AD Request	Artwork - Ad Request	6X9 Postcard Ad Request	10/5/20
00386913	Aaron Rockwell	PLAZA AUTO CARE CENTER	AD Request	Artwork - Ad Request	2fp44 ad request	10/5/20
00386922	Aaron Rockwell	PLAZA AUTO CARE CENTER	AD Request	Artwork - Ad Request	PlusOne Ad Request	10/5/20

[View Report \(My Pending Support Cases\)](#)

Info: My Cases Newly Opened

We can't draw this chart because there is no data.

Recent Items ? Help and Support ★ Daily Dashboards & Reports ★ Daily List Views ⚡ CPQ Help Links ⚡ Payment Help Links ⚡ S

Questions the dashboard helps answer:

- Do I have any Cases waiting on my response?
- Who is my OPS Support person?
- What Cases do I have that are pending support?