

The *Prospect Management* system improves sales and marketing efforts by providing an organized database with user-defined criteria for tracking sales leads and prospects.

Entry and Inquiry

- ♦ Customize user-defined fields and default entries, giving the ability to create databases comprised of specific prospect/customer characteristics.
- ♦ Once the prospect/customer is identified, the user can immediately jump to the Quote or Order Entry function, check stock, review open orders, etc.
- ♦ Record unlimited notes in a comment file that automatically displays the date and time of the entry.
- ♦ Access a prospect/customer file quickly to immediately recall previous conversations.

Monitor Sales Functions

- ♦ Record all contacts and special notes, and automatically determine the next date the prospect/customer should be contacted based on a user-defined frequency.
- ♦ Print a "hot" list of prospects to be called each day, along with the contact name, title and any special comments noted during past contacts.
- ♦ Outside sales personnel can login from remote locations to record call information, and update the file for follow-up by inside sales.
- ♦ Prevent discrepancies among individual salespeople by securing each prospect/customer base.
- ♦ Measure advertising effectiveness by entering the source of sales leads, and tracking the overall responses.
- ♦ Flag multiple prospects/customers to receive form letters based on user-selected criteria.

Letters

- ♦ Prepare personalized form letters to print, store, and recall them as needed.
- ♦ Automatically address the appropriate contact with the proper salutation and closing.
- ♦ Design letters to be consistent with your current company form letter.
- ♦ Coordinate direct mail campaigns for selected groups of prospects/customers based on several different criteria.
- ♦ Print mailing labels with contact names to accompany letters or mass mailings.
- ♦ Tailor call tracking and letter writing to enhance credit and collection efforts by creating a separate database for credit personnel.