



PROFIT MANAGER

Sales Call—Contact Management

Track Customers and Prospects

Profit Manager retains a record of each customer and prospect, including several different sort fields that permit selection and sorting of accounts for various mailings and reports.

Unlimited Account History

Retain and display in date sequence, recent to oldest, unlimited history comments. Each comment displays along with the call date, follow-up date, and person contacted.

Speed—Single Screen Entry

Profit Manager permits entry of any customer related activity (quote, order, direct invoices) through one quick entry process, with flexibility to override information.

Multiple Contact Names

For each account in the system whether customer or prospect, Profit Manager retains up to 99 contact names, each with separate phone numbers and selection codes.

Selective Mass Mailing

Users can easily select groups of accounts to receive merged letters, labels, and/or envelopes. Selection criterion includes a list or range of zip codes, SIC (Standard Industrial Classification) codes, contact codes, salespeople, or other user defined sort codes.

Improve Customer Service

Multiple people may use the Sales Call module, each maintaining their own calls due list while sharing the same customer data base.

Individual Letter Writing

When recording a conversation, you can have Profit Manager produce a fill-in-the blank letter for an individual contact. Easily set up and change letters using Profit Manager's built-in form letter generator.

Calls Due Inquiry or Report

Display online or print a list of calls to-be-made for each salesperson or credit manager, customer service representative, etc. at any time. Select any account with one keystroke—eliminates lost papers and sticky notes.

Calls Made Report

Eliminate manual call reporting. Profit Manager will automatically produce a report of calls made for each salesperson, including comments. This permits easy review of the quality, and the quantity, of calls made.

Analysis Reporting

Profit Manager's Sales Call module includes reports for analyzing zip codes, SIC codes, salesperson, prospect, and advertising by product line and source analysis.

Automated Contact List

Choose to add contacts from the Sales Call screen, while in order entry, or selectively add new contacts from a list generated by Order Entry. Also you can set up Profit Manager to read your customer file and automatically add contacts to the company and contact file.

Insure Information Ownership

By replacing manual sales follow-up methods with Sales Call, you insure company ownership and retention of one of your most valuable assets—your customer and prospect lists.