# EXACT CONTACT TRACKER

This programme is a special module that may be used with EXACT accounting to track all contacts that your company has with customers. Exact Contact Tracker (ECT) also provides sales management facilities such as special commission reports, various types of commission structures, call sheets for sales personnel, special event tracking and call cycles based on geographical management of customers.

In order for this module to function properly you will need the following:

- Information about the contact people at your customers
- Sales Reps information, including their commission structures
- Area information i.e. The physical areas containing your customers
- A code structure for methods of contacting customers
- A code structure for the types of calls that are made on customers
- Categories for the customers (this is optional)

When you have licenced ECT you will see a main menu screen similar to the following:

Customer	Maintenance	Invoices	Reports	Periodic Processes
Supplier	Maintenance	Purchase Orders	Reports	Periodic Processes
Stock.	Maintenance	Goods Out	Reports	é e
ieneral Ledger	Maintenance	Data Entry	Reports	
ontact Tracker	Maintenance	Reports		
System Control	Maintenance	Logged In Users	Firebird Services	Utilities

You will notice that the above screen has an extra bar like this:

1978 - F		
Contact Tracker	Maintenance	Reports

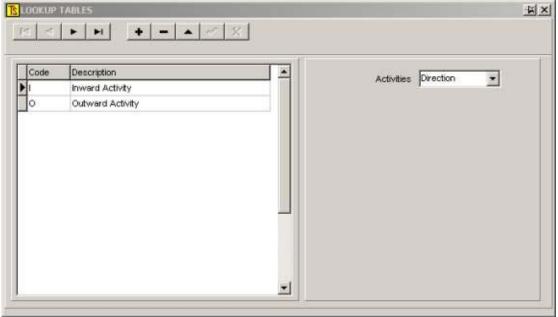
When you click on the [Maintenance] button you will see:

TRACKER - Main	tenance			× ×
Accounts	Sales Reps	Area / Territory	Categories	Lookup Table
Activities	Follow up's			
efctmt : 3.1.3.2	localhost:c:\techr	hisoft\data\brite\brite.f	Ъ	

This screen differs from the normal Customer Maintenance screen found at **[Customer][Maintenance]** in that it has two new buttons, namely **[Lookup Table]**, **[Activities]** and **[Follow up's]** We will deal with each of these in turn.

# Lookup Table

If you select [Lookup Table] you will see a screen similar to this:



This is where you set up all of the parameters you would like to track. We include a few examples to give you an idea of the sort of things most sales oriented companies would like to record. You may dream up some more or some different types of activities.

You will notice that, on the right, there is a selection box that has an arrow to produce a "drop down" box from which you may make a selection between three types of activity.

The choices are **Direction**, **Call Type** and **Method**.

The following two screens show examples of the types of activities that may be entered under each type.

By pressing on the + button you may add your own types of entries, depending on what type of activities you would like to track.

In the above screen there are only two choices for "Direction"; namely Inward or Outward. This is more or less self-explanatory.

An **inward activity** is one generated by the customer (e.g. he phones you) An **outward activity** is one instigated by you (e.g. the rep calls on the customer)

First Time Sales Call - Prospe Administration Call - Customer Follow-Up Sales Call - Customer Dropped in for tea Follow-Up Sales Call - Prospect REFERAL Support/Service Call - Customer	ode	Description	Activities Call Type 🔹
Follow-Up Sales Call - Customer Dropped in for tea Follow-Up Sales Call - Prospect REFERAL Support/Service Call - Customer		First Time Sales Call - Prospe	
Dropped in for tea Follow-Up Sales Call - Prospect REFERAL Support/Service Call - Customer		Administration Call - Customer	
Follow-Up Sales Call - Prospect REFERAL Support/Service Call - Customer		Follow-Up Sales Call - Customer	
REFERAL Support/Service Call - Customer		Dropped in for tea	
Support/Service Call - Customer		Follow-Up Sales Call - Prospect	
		REFERAL	
		Support/Service Call - Customer	J
Not Assigned		Not Assigned	
WASTED CALLS	ŕ.	WASTED CALLS	

### Likewise <Call Type> is pretty self-explanatory

Code	Description	<b>A</b>	Activities Method	-
F	Fax	- 655	ACTIVIDES IMELLICO	-
н	Order Delivered By Hand			
L	Letter			
м	Message - No Presentation			
N	Visit - No Interview			
0	Order Received			
P	Rep Phone Call			
Q	Quotation Submitted			
R	Referral			
S	Visit - Cycled			
Т	Office Phone Call			
V	Visit - General			

Ditto for <Method>

## Activities

If you escape from these screens back to the main Contract Tracker Maintenance Menu and click on **[Activities]** you will see something like this:

<b>A b</b>			+	-   -	<ul> <li>✓ X</li> </ul>			
Contact	Date	In-Out		Method	Notes	More	Bep	Orde
SOREEN GOUVS		0	A	0	5.0 x 5L CAN BRITESEPT UNPERFMD B131		0005	2288
GOUWS, SOREEN	2004-11-10	0	A	V	BESTEL 5X5SEPT/25GEL/25CON		0005	
RABE, HANLIE	2005-02-02	0	A	٧	SUSAN DORP TOE, SOREEN MET VAKANSIE, ALLES REG BAIE STIL.		0005	
GOUVS, SOREEN	2005-02-08	0	А	٧	BEL VIR NOMMERS VAN BOERE		0005	
SOREEN GOUVS	2005-03-01	0	А	F	1.0 x 25KG HOLDER BRITEPINEGEL B109		0005	2460:
GOUWS, SOREEN	2005-03-02	0	А	٧	HET VANOGGEND 25GEL DEUR GEBEL		0005	
GOUWS, SOREEN	2005-04-20	0	А	٧	VOORRAAD 20KGGEL/20LCON/SEPT 20L		0005	
SOREEN GOUVS	2005-05-20	0	А	F	1.0 x 25KG HOLDER BRITEPINEGEL B109		0005	2508:
GOUWS, SOREEN	2005-06-01	0	А	٧	BAIE STIL. ONLANGS GEL BESTEL		0005	
LOUW, SUSAN	2005-08-25	0	А	٧	ALLES REG. BAIE STIL		0005	
LOUW, SUSAN	2005-10-17	0	Α	٧	SAL GEL BESTEL VOOR ONS SLUIT. CON/SEPT NOG OORGENOEG		0005	
LOUV, SUSAN	2005-11-24	0	A	V	GEE GESKENK, SAL BEL AS IETS BENODIG		0005	
LOUV, SUSAN	2006-01-31	0	А	٧	SOREEN DURBAN TOE, VOORRAAD REG		0005	
SOREEN GOUVS	2006-03-07	0	А	F	1.0 x 25KG HOLDER BRITEPINEGEL B109		0005	28612
GOUWS, SOREEN	2006-04-03	0	А	٧	SAL VOLGENDE WEEK BESTEL		0005	
ONTVANGS	2006-05-04	0	Α	V	NIEMAND OP KANTOOR - NA BEGRAFNIS TOE		0005	
GOUVS, SOREEN	2006-06-14	0	Α	V	ALLES REG. HOU GEL IN KANTOOR - GEBRUIK NOU LANGER		0005	
SOREEN GOUVS	2006-08-08	0	A	F	1.0 x 25KG HOLDER BRITEPINEGEL B109, 1.0 x 25 LITRE CAN BRITECON B107		0005	2996
GOUWS, SOREEN	2006-08-23	0	А	٧	ONLANGS BESTEL. ALLES REG		0005	
								• • F

Using the **[Select Account]** button you may select a customer or potential customer and can see all of the activities that have occurred with this client.

# If you click on the + button you may add new activities, and this is how all activities are captured.

The usual sources for new activities are: Telephone calls to and from the client Faxes or e-mail from the client Sales Representatives daily or weekly call sheets Orders placed by the customer

In the latter instance no entry need be made through this module because the information will automatically be entered into this module when the invoice is processed.

You can see from the above that the system can build an entire history of all interactions between your company and the existing or potential customer.

#### Follow up's

These are future events or regularly occurring things like customer's birthdays, anniversaries, special promotions, etc.

When the [Follow up's] button is pressed a screen like this will appear:

Ts	FOLLOW-UPS										Ξ	
	Show Account			🔽 Expand Memo								
	Select Account	ALGBOE		ALG BOERDERY (E	DMS) BPK			• • •	Active	e		
		M	+	8	]	C All	Future O	nly				
•	Phone	Area	Name		Notes			Annual	Date	Time	Mins	Method
ľ												
4	]											

Select a customer using the [Select Account] button.

If there are any future events for the customer, they will be displayed.

You may add new events by clicking on the + button

You will see that there is a field for the following information:

Phone

Area – Selectable from a drop-down box

Name – Also selectable from the list of contacts in the customer's record.

Notes – Type anything you wish in this field

Annual – This field may be toggled on (1) or off (0) An "on" setting would be for annual events such as contacts birthdays, anniversaries, etc.

- Date A drop-down calendar is available for a date selection.
- Time A time for an appointment may be added

Mins. - The expected time required for an event

## **Categories and Areas**

In order for the ECT to function properly it is suggested that you make use of the Categories and Areas facilities.

Categories are used to order your customers on reports and areas may be used to provide "call sheets" for the reps that will suggest calls on customers that are close to one another geographically.

The following shows the screens that need to be maintained.

Firstly the **[Categories]** facility exists in the **[Contact Tracker][Maintenance]** module.

If this button is clicked a screen like this appears:

CATEGOR	IES	K X
Locate		1_
Code ID: HOSP	Description: HOSPITAL	
Notes 7	All provincial and private hospitals	

Here you may enter various categories that you may decide upon in order to filter various reports.

Click on the + to add or the - to delete categories.

The screen below is the type of screen that would appear if you press the **[Locate]** button after you have entered some categories.

It is included to give you examples of the sort of categories you might decide upon.

OSP		OK
Code	Description	1
JUT	BUTCHERY	
CONST	CONSTRUCTION	
AR	FARM	
COOD	FOOD INDUSTRY	
90V	GOVERNMENT	
los	HOSTEL	
IOSP	HOSPITAL	
ют	HOTEL	1
ND	INDUSTRY	
NS	INSTITUTE	
AUN	MUNICIPALITY	
REST	RESTAURANT	
SCH	SCHOOL	

## Areas

Once you have entered the categories you should enter Areas.

These are the geographical areas that hold your customers and should be organised in such a way that the computer can sort them so that adjoining areas will appear next to or near one another in any listing of areas.

One way to do this is to draw the areas onto a road map and to number them adjacently, rather like the manner in which the pages of a standard urban map book are organised.

Select the **[Area / Territory]** button from the Contract Tracker Maintenance menu.

You should see something like this:

Ts AREAS				XX
Locate		+ - • ~ % C	<u>+</u>	
Code JA19	Description ALBERTON			
Status C Active C Inactive	Report Yes No			

Using the normal methods, insert your areas.

You will notice that areas may also be active or not, and may appear on reports or not.

## **Customer Maintenance**

Once you have entered all of your areas and categories you may proceed to capture this information into your customers' records.

To do this you must go to [Customer][Maintenance][Accounts] and select an account to work with.

Note that although there is the facility to go to the same records by clicking the **[Accounts]** button from the **Contact Tracker** menu, you will not be able to edit a record from here because whilst sales-people may need to view data, they do not have access to change the information.

Select a customer's record and click on the **<Rep / Area>** tag. You should see something similar to this:

	×
A/C Code Name Active	
BLOVBULL KOLLEGE	
Address Balances Rep / Area Miscellaneous Contacts Sales Summary Item Summary Notes / Footer	
Rep 0002 BAR FLY	
Commission 0.00 %	
Contact Information Call Frequency	
Area C5A BLOEMFONTEIN	
Category NS INSTITUTE	
User Definable 1 User Definable 2	

You will observe that this is where you would enter the relevant information regarding the customer's category and the area where he is situated. You may also determine how often you would like the sales representative to call on the customer. **(Call frequency)** 

#### Running Contact Tracker

Once you have set up your reps, areas, categories, customers and activities as described above, you will be ready to run the system and enjoy all of the management functions.

Each and every contact that the company has with the customer should be logged, by processing the activity via ECT's [Activities] screen, as described above. Invoices and credit notes are tracked automatically.

## **Contact Tracker Reports**

Once you have captured sufficient historical data to give meaningful information you can start getting useful reports out of the system.

Go to [Contact Tracker] [Reports] and you will see this:

TRACKER - Reports			<u> </u>
Activities	Recommended Calls	Calls Made	Call History
Future Events	Cold Calls		Assign Cycles
efctrp : 3.1.1.2	ocalhost:c:\technisoft\data\bril	te\brite.fdb	

#### Select [Activities]

A screen similar to this will appear:

ACTIVITIES	¥_O×
🔽 Ву Вер	View
Print     Select     Non-Buying Accounts       Summary <ul> <li>Accounts without call cycle allocation</li> <li>Accounts with call cycle allocation</li> <li>All accounts</li> </ul> <ul> <li>Only</li> </ul>	Vo Preview
No Df Activites To Print	
Maximum 8 - Report on zero activities accounts	
Sales Rep / Area Selection Account Selection	
Reps	
Start At	
End At	
Areas	
Start At	
End At	

You will see that various selections can be made from within this screen.

Starting at top left you will see that the reports can be ordered by Rep.

If you select this option the reports will print out in order of the reps to whom the reports will be issued.

If you have a lot of sales personnel for whom you are generating reports, it may be advisable to select the **<No Preview>** button so that you do not need to return to the report and instruct it to print after each sales person's report has been completed.

You may also select whether you would like a summary or a detailed report, or both.

A summary report will give you a I list of customers, the main contact person and the phone number.

A detailed report will give you a report on the activities of the selected range of customers, showing when they bought last, etc. These reports print one customer to a page and you may select the number of Activity occurrences to print on each page.

<Number of Activities to Print> will determine how many activities to print on a detailed report.

You may also select Active accounts only,

'Active accounts only' (meaning not deleted and not de-activated) OR all (active and de-activated ones)

Further filtering of the report may be done by selecting, on the relevant tags: A range of Reps or Areas to report on A range of customers or categories of customers to report on

Now you may go on to [Recommended Calls]

This will show a screen like this:

			<u>×                                     </u>
By Rep     Exclude Terminated Accounts     Account With Call Frequency 0 (Zero)     Exclude     Overdue If Not     Seen Within Lest     Weeks     Sales Rep / Area Accounts	Order By Account C Last Visit Date C Last Contact Date C Time Overdue C Priority Rating	Select Printer Direction Ascending Descending	View Overdue Accounts Only Print Notes
Sales Reps			
Start At End At			
Areas			
Start At End At		_	

You may decide to order these reports by rep, but if this option is selected, then no preview of the report is possible – it will print directly to the printer when you click **[View]** 

You may exclude those accounts that annoyed you so much you had them terminated. [Terminated Accounts]

You may exclude those accounts with a call frequency set to zero, but if this is deselected, then you should determine the interval since the last rep's call that should be cause the system to regard the customer as being overdue for a call.

The reports may be ordered in several self-explanatory ways and the usual selection of Reps, Areas and/or Accounts and Categories may be made.

Once you have made your selections and clicked **[View]** the computer will think for a while whilst apparently doing nothing and then produce a report that may look something like:

Accounts	F	ep 0004				Page 1				
Categ		ea		ORDER B	Y DAT	*				
CODE	NAME	LAST SEEN	0' DUE	LAST CNTCT	TYPE	E	REP	AREA	CONTACT	PHONE
CODCOMH	Ballin and Date	2006-08-17	28	2006-08-16	Р	2.0 x 25KG BAG BRITELOWASH B133, 1.0 x 5 LITRE CAN BRITEDISH B137	0004			
CODHAHO	a diservative	2006-08-17	28	2006-07-05	V	LYK MOOI - SALMY KONTAK AS IETS KORT	0004			
CARHOT	and the second second	2006-08-16	29	2006-08-16	Р	BESTEL DEO-BLOCKS	0004			
CODOUG	surger particular	2006-08-16	29	2006-07-03	V	HET FLORVGLO OOR - GAANMOREMET VERLOF	0004			
WILLERA	and the second se	2006-08-16	29	2006-07-04	V	LOER NET IN - SÊ HET NIKS NODIG NE	0004			
NICBEK	NO. BRIDDE DE CENTRE	2006-08-16	29	2006-07-04	V	TOE	0004			
CARNABA	CONTRACTOR OF A DESCRIPTION OF A DESCRIP	2006-08-16	29	2006-08-16	P	BESTEL 2)/25GL0/5GEL	0004			
BRAINT	terstender Besting with	2006-08-16	29	2006-05-24	V	WAG VIR GELD- SAL DAN KWOT AANVRA	0004			
FRASLA	Concession and Concession of Concession	2006-08-15	30	2006-07-03		NIKS NODIG NIE	0004			
CODKUTY	Contraction of the local data and the	2006-07-17	59	2006-06-29		KLAARMET VLOERE- ALLES REG	0004			
HUIALH	and shall the state	2006-05-24	113	2006-03-02	V	VLOER LYK MOOL NIKS NOU NODIG NIE '20'	0004			
Palpri	The second second	2005-11-09	309	2005-10-14	т	-1.0 x 25L CAN BRITEGLO PEFFUMED B119a -2.0 x 500 MM RED BUFFING PADS (5/CARTON) -2.0 x 325 MM RED BUFFING PADS (5/CARTON), -1.0 x PAD REPLACEMENT FACE500MM	0004			
CODKAY		2005-10-20	329	2005-11-03	т	BEGIN VOLGENDE MAAND BESTELLING PLAAS	0004			
CODHOBO		2005-08-22	388	2005-07-19		NOT INTERESTED	0004			
CODHORA	w-beec-beeccon.	2005-08-12	398	2005-08-16		INTERESTED IN PINE HE PROMISES THAT HEWILL BUY NEKT WEEK				
TAFELPRI	THE COMPANY CONC.	2005-07-05	436	2004-10-19	V	SAAM GESTAP NA OPSIGTER-REEDS BESTEL. MINR BROWN WILLONS KANS GEE IN NUWE JAAR	0004			
CODALTS		2005-04-07	525	2004-10-05	V	GESELS PRODVPRYSPROBLEEM GEBRUK GOEDKOOPSTE MOET6 MINDE PRYSEKYK EN VERGELYK/OOPKOP	0004			
SARSKO	Carlo Bargaretta	2005-04-07	525	2004-03-29	v	NOG STEEDS SOLUKEM- SAL NE VERANDER NIE	0004			
LABKER	Contraction of the second	2005-02-03	588	2004-10-06	V	praat oor kwot/prod. Opleing/inspeksies. Ook ander	0004			

#### The next report to consider is the **[Calls Made]** report. Selecting this button gives the following screen:

ALLS AND ACTIVITIES		
	View	
lection		
late		
Start At 2006-10-26	5	
End At 2006-10-26	15	
Activity of Type		Report Type
Incl	ude Identified by	Activities report     Activities per day
Visit; Cycled (S)	<b>▼</b> S	S Activities per day
Visit General (V)	V N	
Visit; no interview (N)		
Phone call by rep (P)	P	
Quotation (Q)		
Order received (phone) (O)		
o I · · · /// .//D	F	
Order received (fax) (F)		

This screen is more or less self-explanatory and will give a report, ordered by Sales Rep, of all of the activities selected.

Next comes the [Call History] report that brings a screen like this:

S ACTIVITIES SUMMARY	xo_ X
Image: Weight of the second	View
Applicable to accounts without Order By Accall cycle allocation Visit every 0 14 days	ccount
Sales Rep / Area Selection Account Selection Call Types	
Dates	
Begin At     2006-10-28     13     Reference Date for days       End At     2006-10-28     13	2006-10-28 1
Reps	
Start At	
End At	
Areas	
Start At End At	

The fields and options are pretty much self-explanatory.

The next report is the [Future Events] report, which will give you a screen like

	ITS		¥ _ D ×
🔽 Ву Пер	Event Type C Both C One Off C Annual	Group By © Date © Company © Name	View
Selection			
Date			
Start At 2006- End At 2007-			
Sales Reps			
Start At			
End At			

You will get a report for each rep of the future events that are to occur with his / her customers. (Things like birthdays, anniversaries, etc)

Now we come to the [Cold Calls] report

TS COLD CALLS		× _ D ×
🔽 By Rep	Select Printer	View
Exclude Terminated Accounts		
Sales Rep / Area Selection Account Selection		
Sales Reps		
Start At End At		
Areas		
Start At		
End At	j	
Date Range (of Cold Calls)		
Start At 2006-07-01 15		
End At 2006-10-26 15		

The selections are self-evident.

The report is very useful in that, at the end of each rep's report it gives the total number of accounts (cold calls) made during the selected time period, the number of visits made to these accounts over the period, the number of contacts with the customer and the total monetary value for the sales made to these customers. This is a very useful report to determine the relative efficiencies of your sales people.

The last selection in this section is the **[Assign Cycles]** button.

DISTRIBUTE ACCOUNTS OVER CALL CYCLE	×	_ 🗆 🗙
	View	
Weeks per cycle 0 Max Calls 0	Allocate New Cycle Groups to Rep	
ales Rep / Area Selection Account Selection		
Reps		
Start At Find St		
Areas		
Start At		
EndAt		

This is a facility to allocate the customers that the sales person has in his area to a call schedule that is based upon the number of calls that a rep can make per day. You may enter the number of weeks per cycle that you would expect the rep to use. This is normally greater than 4, but less than 9, but the important thing is to try and avoid a 4 week cycle or any multiple of 4.

This is in order to "stagger" the calls made to customers in such a way that you will not always be calling on the same customer at the end of a month.

The **[Max Calls]** is the maximum number of calls that you would expect the salesperson to be able to make during one week.

This report will indicate whether a sales person has too many customers to attend to properly (or too few).

If, for example you set a 5 week cycle and you know the rep can do 25 calls per week, the report will "allocate" (Sorted by geographical area) the first 25 customers to the first week, the next to the second week and so on until it has gone through all of the customers assigned to a sales person.

If, at the end of the day there are only 4 weeks filled with calls, then you know that there is room for that sales person to build up his customer base.

If, on the other hand, the report goes to 9 weeks, then you know that the rep is over-extended and cannot give his customers adequate service.

If the options **Allocate New Cycle Groups to Rep** is selected, then the rep's records will be adjusted to take the new groups into consideration when preparing the report.

If the **Commit new allocation after reporting** selection is made, then the changes will become permanent when the report has finished printing and these new parameters will be used for calculating documents such as work sheets, etc.

#### **Other Reports**

If you go to **[Customer][Reports] Sales Reps** you will see a selection of four menu items, namely:

Sales - Summary or Details of a Rep's sales over a selected time. The sales rep may be linked to a customer account or to invoices. In other words, if a rep is linked to accounts, then the report will display all transactions of customers who have that specific Rep in their records. If a Rep is linked to the invoices, then the report will report on all invoices where the Rep was entered as the Rep for that specific invoice, over-riding the

normal Rep who would get commission on that account.

Note: it is probably a good idea to run the summary reports in both modes each month to see if there is a difference between these reports and investigate the reasons

**Commission** forms - A report showing sales Reps commissions in various

**Worksheets** - Produces worksheets for the sales Reps, helping them to plan their calls properly.

**Export Sales** -Allows the export of Reps sales information in various formats to an Excel spreadsheet