



## CRM

In today's highly competitive environment, an effective marketing strategy is dependent upon the quality of the comprehensive information available. **The Next for Windows™** CRM System opens the door to a

remarkable new concept in marketing. This System not only reports on your customer database, it provides a detailed analysis of the effectiveness of your sales force. The system allows to identify prospects within any defined territory and to track all equipment in your marketing area. The system is integrated with the Parts, Service, Customer, and General Ledger Systems.

### Features:

- ◆ Sales Analysis by Territory, Salesperson, Customer, and Product
- ◆ Customer Machine Population for Equipment Supported, Competitive or Both Integrated to Service and Order Entry
- ◆ Call List by Salesperson for a Selected Period, Date, Type of Call, and Notes from Previous Calls are displayed
- ◆ Sales Management Reports for Calls not made on Schedule
- ◆ Multiple Salesperson Assignment for Customers and Prospects
- ◆ Prospect Information includes: Marketing Division, Contact Information, Territory, Sales Call PAR, Open Date, Last Call Date and Sales Persons, Unlimited Contact Names, and Notes
- ◆ Equipment Population Information by Customer includes: Division, Manufacturer, Serial Number, Inventory Group Number, Size, Dealer, Power Codes, Model, Equipment Type, Manufacture Date, Date Entered, Own or Leased, and Notes
- ◆ Reports: Machine Populations, Competitive Sales Analysis, Call Analysis, Campaigns, Letters, Mailing Labels, Salesperson Call History, Customer Ranking, and Sales Person Itinerary
- ◆ Mobile and Wireless Capabilities
- ◆ Equipment Image File for Photos, Scanned Documents, Brochures, PDF's, etc.
- ◆ Microsoft SQL Database™





# CRM

## Customer Profile

**Customer Profile**

Customer ID: 100106

Name & Address: SMIDT COMPANIES INC.  
3600 HWY 63 SOUTH  
ROCHESTER MN 55904

Since: 3/12/2001

Phone: 507-281-4080 Fax: 507-281-4609

Sale Volume

	This Month	This Year	Calendar Prior Year
Parts	123,167.45	123,167.45	0.00
Service	78,574.13	78,574.13	0.00
Rentals	585,178.00	585,178.00	0.00
Sales	123,199.00	123,199.00	0.00

Buttons: Parts Purch, Equip Owned, Cur Rentals, Memo Data, Sales Volume, Next Customer, Close

## Client Master

**Client Master (Change)**

Client Key Data: Client Id: ACME, Division: [ ]

Client Data: Prospect Name: ACME BRICK - ELGIN  
Name: ACME BRICK - ELGIN  
Search By: ACME  
Primary Contact: JASON LILES, LEON PRINCE-PLANT MGR.

Physical Address: Address 1: 1776 OLD MCDADE RD.  
City / State / Post Code: ELGIN TX 78621-0000  
Phone / Fax / County: 512-281-5744 512-287-9876 BEX

Mailing Address: Address 1: 1776 OLD MCDADE RD.  
City / State / Post Code: ELGIN TX 786210000  
County: BEX

Sales / Call Data: Sales Territories: (1) (2) (3) (4) (5) (6)  
Foreign/Domestic: Domestic  
Date of Last Call: 2/16/2009  
Type of Last Call: Te  
Next Call Date: 2/19/2009

Buttons: Change, Cancel