

## Customer Relationship Management

**SalesCTRL™** manages the information you need on your prospects, customers, and vendors: names, companies, addresses, phone numbers, profiles, activities, follow-ups, meetings, quotes, sales, opportunities, service issues, letters, faxes and e-mails.

**SalesCTRL** is a proven out-of-the-box solution that integrates account management, with sales team and opportunity management, marketing automation, customer service and support, custom reporting, and accounting software interfaces.

You customize it to work the way your business works. Use the pre-defined databases and reports and change them, create your own, or purchase one of our industry specific strategies. **SalesCTRL** is flexible enough to be quickly modified by you without custom programming.

## Daily Follow-Ups

The user-defined To-Do List displays everyone in your databases you're supposed to contact today, tomorrow, next week, last week or whenever they are scheduled. These reminders appear on your To-Do List until the follow-up activity is completed. Add follow-ups to your Microsoft **Outlook®** calendar or Task List.

## Find Any Information Instantly

Find any contact or company in your database by double-clicking a field and typing the first few letters of their name, company, telephone, city, phone, e-mail, etc. Need to find a contact based on several fields? You can use the "Query" function to find records based on multiple criteria and save that query for later use. Even if you have 250,000 contacts in multiple databases, the Global Search feature will quickly display your information.

## Keep Detailed Information

Create multiple user-defined databases with an unlimited number of contacts per company including relationships to other companies and contacts. Define custom Company, Contact, Account Rep, Sales Partner, Detail Tab fields for profiling and tracking information about your customers, prospects, vendors, opportunities, service issues and sales channel.

Do you need to maintain multiple addresses per contact? **SalesCTRL** tracks Home, Business or Bill-To/Ship-To addresses. A checkmark designates either address as the main mailing address. Manage multiple phone numbers as well as e-mail accounts to stay in touch with your contacts.

## Track Contact and Company Activities

Store each contact's name, address, buying habits, size, source and unlimited comments describing everything that occurs in the relationship. Switch between viewing activities for an individual to viewing activities for the whole company. Multiple view options help you quickly drill down to the right information.

The screenshot displays the SalesCTRL software interface. The main window is titled "DEMO: Microwave Products, Inc. - Annette Vento". It features a menu bar (File, Edit, Maintenance, Tasks, Lookup, Master Lists, Admin, HotLink, Window, Help) and a toolbar with various icons. The interface is divided into several sections:

- Company Information:** Company Name: Microwave Products, Inc.; Address Line 1: 5491 South Center Street; Address Line 2: Suite 10; Address Line 3: ; City: Westwood; State: MA; Postal Code: 02090; Country: US.
- Contact Information:** Name: Annette Vento; Prefix: Mrs.; First Name: Annette; Last Name: Vento; Full Name: Mrs. Annette C. Vento; Salutation: Mrs. Vento; Title: Vice President Marketing; Group Code: 4 (Qualified Prospect); Phone: 617 555-8125; Ext: 204; Fax: 617 555-5381; Call Type: 3; Best Time: 15:00; E-Mail: annv@micro.com.
- Accounting/Rep Information:** Account Rep: HEJ (Hank E. Jovan); Sales Partner: BBB (Robert B. Boyton); Telephone contact: Next FAJ Date: 04/17/2001.
- Activity Log:** A table at the bottom shows a list of activities for Annette C. Vento, including "Vice President Marketing/HEJ", "Information Systems Dir/HEJ", "National Sales Manager/HEJ", "Director/HEJ", "President/HOU", and "Sales Department/HEJ".

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## Personalized Correspondence

Want to send a personalized letter, fax or e-mail to your contact or targeted group? Select contacts for a mass mailing or broadcast e-mail based upon the criteria you specify.

Use the Letter Wizard to create a new letter or change an existing Word® document, fax through ActiveFax®, or e-mail through Microsoft **Outlook** or your corporate SMTP server.

**SalesCTRL** stores your correspondence including attachments in the contact's activity record.

## Report On Anything

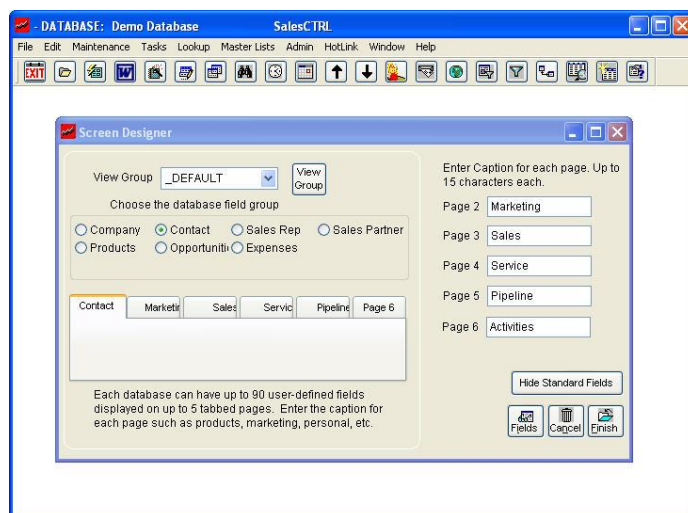
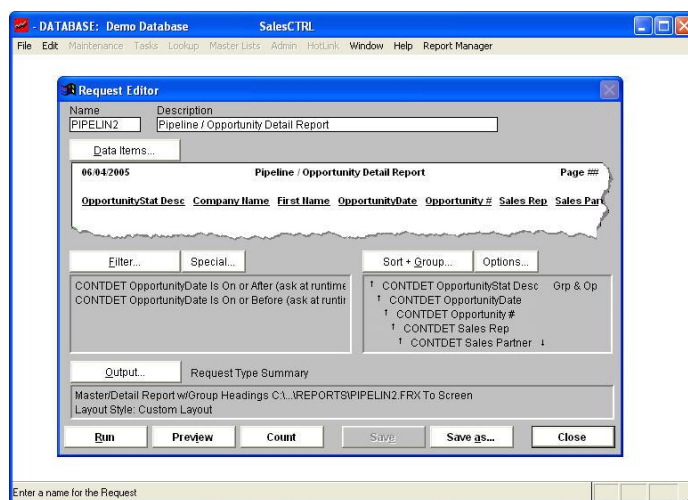
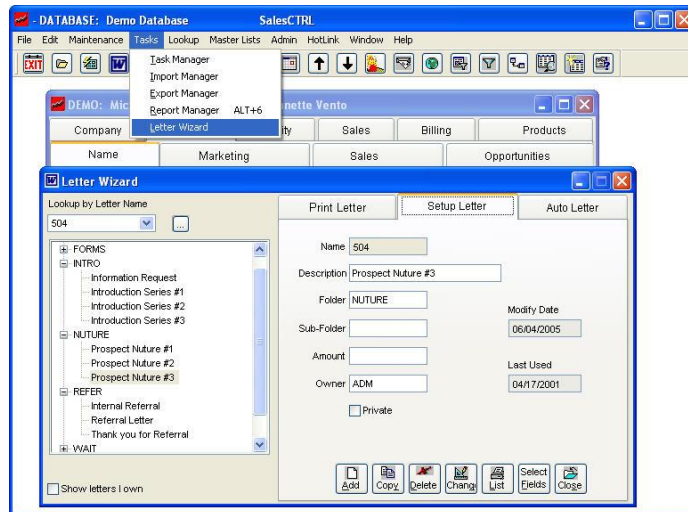
Use the standard reports in **SalesCTRL** or create as many new ones as you want using the fully integrated report writer. Select, sort, export to Excel®, and print a report on anything in your database. Run reports whenever you want or automatically on a timed basis.

You can even include data from **SalesCTRL** and **OSAS®** or **TRAVERSE®** using the optional **HotLink** integration.

Best of all, you don't have to be a programmer to use the helpful report writer wizard.

## Easy To Use Database Wizard

Enter data quickly and accurately with drop-down fields. Create custom fields with specific data types and logic based upon other fields. You can also place your custom fields under Tabs that you define (Marketing, Opportunities, Sales, Business, and Misc.). The system also allows you to rename any standard field in the database to an industry specific name. If you have Agents instead of Salespeople, change the field name and it is changed throughout the database. Are there fields that are required when you enter records? Configure **SalesCTRL** to force you to fill in "Required" fields before leaving a record.



**Single Solution for Sales, Marketing and Customer Service**

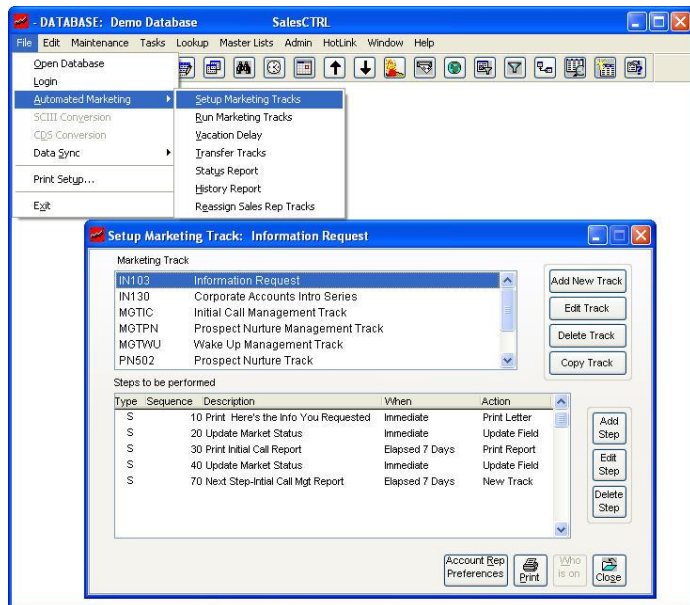
# SalesCTRL

## Sales and Marketing Management

It's a fact. Most sales are made after the sixth contact and most Account Reps give up after two contacts. A database full of contact information doesn't help you unless you can turn that information into a sale. Here's how **SalesCTRL** can help your company increase sales and work more profitably.

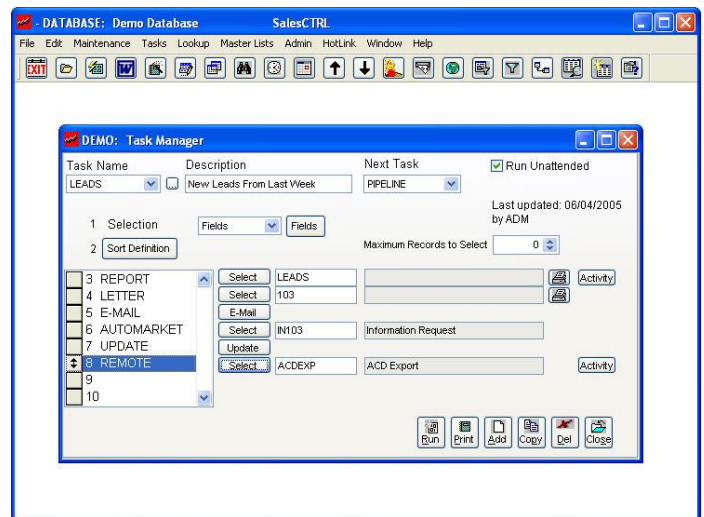
## Automate Marketing

**SalesCTRL** allows you to build sophisticated marketing campaigns for staying in touch with your clients, prospects, and former customers. Build a Three-Letter Intro Track to introduce your company to a prospect. The system prints a report or schedules an activity for the Account Rep to call and set an appointment. Place your existing clients on a Cross-Marketing Track to introduce them to all of the services and products that you sell. The optional Automated Marketing application allows you to print, fax and e-mail letters or call reports, generate an activity, update fields, and start or remove tracks. Best of all, these marketing functions can be performed by a marketing coordinator thus freeing up the rep's time to do what they do best ... SELL!



## Automate Workflow

The Task Manager can automate internal business processes by creating workflows for routine tasks involved in daily business operations. For example, you can download a mailing list and import the names into the database. Once the names are imported, the Task Manager can assign them to the appropriate Account Rep, log an activity about the mailing, print or e-mail the letter, print envelopes or labels, and then generate a report of what you just sent. Use this Task for the next mailing or as a template for a new Task. You can have an unlimited number of tasks for managing newsletters, promotions, product announcements, broadcast e-mails, faxes, letters and database information. You can even define the Tasks to automatically run unattended per your schedule.



## Customize Communications

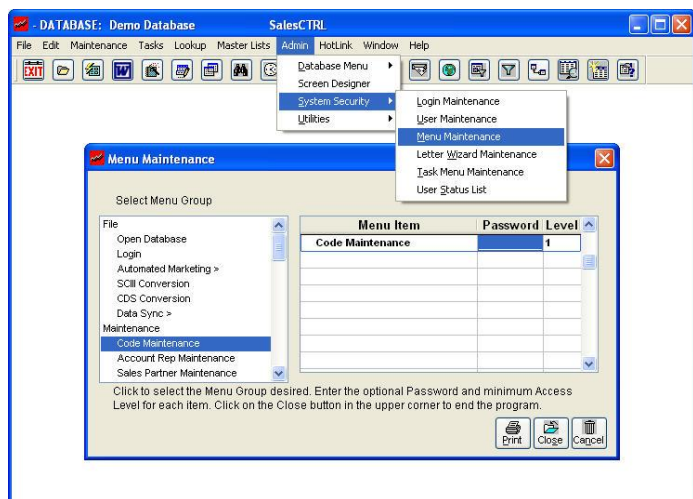
**SalesCTRL** has over 20 standard Account Rep and 180 company/contact fields for use in letters, faxes, reports and e-mails. These fields allow you to personalize communication to your specific needs. In addition, you can use the Account Rep custom fields for expense reporting, signature capture for letters and e-mails, and tracking such items as assistants, office hours, or other information that might change between Account Reps and Sales Partners.

**Single Solution for Sales, Marketing and Customer Service**

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## Multi-level Security

Control access to information by database, user login, user group, menu function, company and contact record all the way down to the field level. Allow the accounting department access to change sales revenues, yet limit the sales department to read-only access for the same fields.



## Integration with Microsoft® Outlook

Click on the contact's e-mail address to send through Outlook and the email is saved as a contact activity for future reference. Drag and Drop e-mails from Outlook into the contact activity screen to create a copy of the e-mail.

You can also send targeted broadcast e-mails along with attachments for keeping clients and prospects updated about product information and pricing changes.

## Telemarketing

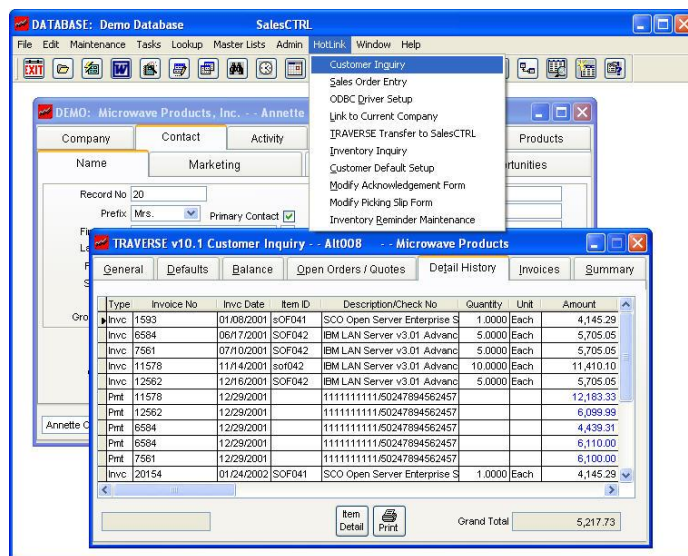
The **SalesCTRL** system builds an on-screen call list for your out-bound telemarketing. Once the prospects are qualified, the telemarketer can schedule a follow-up or a call back by the Account Rep. When the prospects from a mailing or broadcast e-mail phone in, the telemarketer instantly finds the record in **SalesCTRL**, records the details of the call in the contact's activity record, e-mails the requested information along with a quote, and schedules a follow up to appear on the Account Rep's To-Do List.

## Remote User Data Synchronization

**SalesCTRL** keeps your local and remote users in-sync by managing the changes to their databases. You determine the data synchronization rules by user and schedule the incoming and outgoing data updates for the local and remote users. Everyone is kept up-to-date with the latest information including company and contacts, activities, letters, reports, Tasks, e-mails, security levels, and even database structure changes.

## OSAS and TRAVERSE Accounting Software HotLink™

Real time access to current customer account, inventory status, open orders and sales history information, and enter orders and quotes directly from the contact screen. Analyze detailed sales history along with the company, contact and activity information using the integrated report writer.



***SalesCTRL** is designed to manage every aspect of your company's sales, marketing, and service functions. Please call us when you are ready for a hands-on review of this proven solution.*



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