

# Advantage Help

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- [Advantage Executive Overview](#)
- [Setting Up Your Advantage System](#)
- [Quick Tour of the Advantage System](#)
- [Orientation to Operating the Windows System](#)
- [Today's Schedule](#)
- [Overview of Client Details](#)
- [How to Manage Activities](#)
- [Overview of Reports Available](#)
- [Mail List Management](#)
- [Reference to Toolbars](#)
- [Integrating with Other Systems in Your Organisation](#)
- [Data Issues](#)
- [Available Support Options](#)

# **Advantage**    General Information

**Advantage** for Windows is a Sales and Marketing information system. It is developed, marketed and supported in South Africa by **Third Wave Software [Pty] Ltd** One of very few companies internationally to offer a total solution in the "Third applications software wave" - this being Sales and Marketing information systems. The first two waves addressing respectively accounting/financial applications and then manufacturing applications. Your sales and marketing systems are a critical business area in that they constitute the revenue producing systems that feed the financial and manufacturing systems. Moreover, they are the most immediately responsive to efforts to enhance revenues and turnovers and have thus the greatest potential to develop a competitive edge.

# Available Support Options

- [When you have a Question](#)
- [Types of Technical Support Available](#)
- [Electronic](#)
- [Telephone Support](#)
- [Product Training and Consultations](#)

# When you have a Question

If you have a question about **Advantage** :

1. Consult online Help, or look in the **Advantage User's Manual**.
2. If you cannot find the answer, or you require additional support, consult **Advantage Technical Support**.  
Before calling this service please ensure that you have an accurate description of exactly what information you require and the precise location of where you are in the program. If calling in response to an error message, make a note of the message before calling.

Please note, the Support and Consultation services are available and subject to the then-current prices, terms and conditions, and subject to change without notice.

## Types of Technical Support Available

- Electronic Support
- Telephone Support
- Product Training and Consultations

# Electronic Support

Currently no service is available. Availability of Support via electronic media ie. Compuserve, Internet etc. will be notified via newsletter when available.

## **See Also**

- [Telephone Support](#)
- [Product Training and Consultations](#)

# Telephone Support

If you have a question about **Advantage**, consult online Help, or look in the **Advantage** User's Manual. If you cannot find the answer, or you require additional support, you may make use of the "Telephone Support" service. NB! You will require a paid up maintenance agreement for this.

## Telephone Support.

When you call for support you should be at your computer terminal and have the appropriate product documentation at hand. Be prepared to provide the following information :

- Version of **Advantage** you are currently using.
- Type of hardware that you are using, including network hardware.
- The exact wording of any error messages that appeared on your screen.
- What happened and what were you doing when the problem occurred.
- How you tried to solve the problem.

## Telephone Maintenance Agreement.

Telephonic Support is available free-of-charge to all clients on a **maintenance** agreement at a rate of 10% of current retail prices.

For support on **Advantage** Contact : (011)462-6871 Johannesburg, South Africa.  
Contact your software dealer for support contact numbers.

Support consultants are available between 8:30am and 5:00pm South African time, Monday through to Friday, excluding public holidays.

See Also

- [Product Training and Consultations.](#)
- [Electronic Support.](#)

# Product Training and Consultations

Training Courses on **Advantage** are run weekly by Third Wave Software.  
Consultations for implementing **Advantage** within your organisation are also available.  
Please call for prices and availability.

Call **(011)462-6871** Johannesburg, South Africa for further information.

See Also

- [Electronic Support](#)
- [Telephone Support](#)



# Reattaching Data Files.

The Data for **Advantage** is stored in a separate file to the **Advantage** program. Sometimes the attachment to the data file is removed. This can occur after any of the following:

1. The data file becomes corrupt.
2. The data is stored on a network server and the PC (Workstation) is not connected to the server.

After any of the following occurs, next time you start the **Advantage** program the Reattachment screen is displayed asking you for the path to **Advantage** data.par

To reattach your data follow these steps:

1. Logon to the system as an administrator (with a password with "Admin" rights).
2. When asked for the path to your data enter the drive or Server Name directory path and filename of the **Advantage** data file. e.g. (The slash represents a backslash.)  
C:/ADV/ADVDATA.MDB or  
F:/APPS/ADV/ADVDATA.MDB or  
//SERVER/ADV/ADVDATA.MDB.

# Glossary of **Advantage** Terms

Please refer to manual and other help screens. [Try Search.](#)



# Quick Tour of the **Advantage** System.

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OBJECTIVE: To familiarise the user with the main operations of the **Advantage** software in the shortest possible route.

There are two possible scenarios in which **Advantage** can be operated.

1. Sales staff use the software directly.
2. The system is operated by an administrator who logs information on behalf of the sales staff.

Click below to view a schematic representation of the activity flow for the software usage..

- [System Flow Schematic.](#)

The following items tour the primary operations performed to service customers and track prospects.

- [Creating a New Client](#)
- [Adding New Entries to Pull Down Lists](#)
- [Scheduling a New Activity](#)
- [Printing Out Scheduled Activities](#)
- [Entering Results of an Activity](#)

With the advent of Windows and the proliferation of PC's, the trend is for sales staff to operate the software directly.

# Creating a New Client

The term "Client" is used to describe both Prospects and Customers.

Add a new client as follows:

- Click on the Add New Client/s button on the top toolbar.
- Enter your Client's Name. (Company or Individual).
- Click on the Customer field to change to a Prospect/Customer.
- Select the Sales Staff member (Account Manager) responsible for this Client.  
(The sales person should default to the original person highlighted on the Today's Schedule form).
- Enter the rest of the details of this new client. [More Details](#)

For the Designation, Function and other fields where a pull down list is attached, double-click on the down arrow to the right of the field to add or modify the entries in these lists. Then use these [Pull down lists](#) to select an entry.

Select the entries for each of the fields as displayed on the screen.

Records are automatically saved when you exit the Client Details screen or proceed to another client record.

## Adding New Entries to Pull Down Lists

**CLIENT TYPES:** Double-click on the down arrow next to Client Type to modify the entries in these lists. Start by adding these on the row starting with the asterisk(\*). These type codes classify your Customers (C) or Prospects (P). For each client type, specify C or P in the last column to specify whether this applies to Prospects or Customers. Click on the Exit door when finished.

**STATUS:** Click next to Status to modify your **Sales Path**. Prospects are categorised by their status in the sales cycle to facilitate management of the prospect base. Example  
The Objectives column details requirements in order to achieve each status. Click on the tick next to status to change the client's status.

Select an entry from each of the following pull down lists:

Source

Industry

Area

User Defined Fields. These 6 fields are customisable. You can change the **names** of these fields by selecting the System Administration tool on the toolbar. These are useful for adding any data items that are not already available in the standard fields.

Main Product of Interest.

# Scheduling New Activities

In order for prospect tracking to function, a prospect should always have a next activity scheduled. This ensures that we do not lose contact with this prospect. The system also has management reports to ensure that no prospect is overlooked.

Note that clients can also be allocated service cycles where the software automatically schedules activities on a regular basis with clients - especially for customer servicing. See [Generating activities](#).

There are 2 types of activities that can be scheduled:

- [Ad Hoc Activities](#)
- [Automatic Activity Scheduling](#)

# Ad Hoc Activities

When an activity is arranged with a client (Telephone call, face-to-face or mailing), this is scheduled into the system by logging the activity date and details as follows:

Click on the **New Activity button** (handshake) on the tool bar.

Note that activities scheduled for a specific time can also be automatically posted by **Advantage** to your MS Schedule+ diary if you are working with Microsoft Windows for Workgroups. (Set this on your System Administration Form).

The New/Edit Activity screen allows the following items to be captured:

Sales Staff ID

Company

Contact

Activity

Activity Date

Time

Priority

Duration

Comment

View/Add Activity Note

Add New Activity

Cancel

Activity Date

Activity Time

Microsoft Schedule +

Enter any applicable notes in the Notes area by Clicking on the Notes button. There is no limit to the number of lines you can enter.

Clicking on the Exit door automatically saves the activity.



# Automatic Activity Scheduling

Advantage can automatically schedule activities for you should you wish to plan a regular activity with a client. This can be a regular visit or phone call to a specific person at a client or it could be a product level activity to prompt you to service a product at a client (e.g. renew a maintenance contract).

You can set up automatic activity scheduling as follows:

- Allocate Service Cycles to clients by clicking on the **Service Cycle** tool on the right end of the Toolbar at the top of the screen. The Service Cycles screen appears. Capture service cycles as required. E.g. John Smith needs to make a Face-to-Face visit to Steve Hadden once a month (Every 30 days). The cycle periods can be modified by double clicking on the Down arrow in the Cycle ID column. Note that many sales or service people can have cycles at a client and you can set cycles for many contacts at that client. See [Service Cycles](#)
- Type the last visited date under the Last Visit column and the Next Visit date automatically calculates based on the selected cycle.
- Run the [Generate Services](#) button on the toolbar as often as the shortest service cycle. (i.e. if the shortest cycle is 7 days, run it every 7 days).

You can also click on the Product Agreements tool to specify Product Agreements with expiry dates - the system generates activities reminding you to renew agreements when expiry dates are reached.

# Generating Regular Service Activities

Click on the **Generate Services** tool on the far right of the Toolbar.

The generate function needs to be run as often as the shortest service cycle - if sales staff service clients on a weekly basis, and require service prompts weekly in advance, then generate on a weekly basis. Click on the Generate Services button to start this process. Click on the activities tool on the toolbar, to view all scheduled activities that have been generated and completed activities for the current client.

- [Regular Service Cycles](#)
- [Product Level Prompt](#)
- [Batch posting of Activities](#)

# Printing Out Scheduled Activities

NB! This step is only required where the system is operated by a central person.

To control the sales staff activity, it is recommended that the operator print out a schedule of each sales persons activities on a regular basis prior to the due dates.

If many face-to-face visits need to be completed, it is very useful to have the client card with you as your PC may not be accessible at the client. Call reports can also be recorded onto the card.

- Click on the **Reports button** (printer) on the toolbar.
- Select the **Scheduled Activity and Client Cards** report to be printed.  
The radio button to the left of the report name should be filled in.
- Click on the Print Preview button on the right hand side of the screen to preview the report on screen. The report can also be printed from this screen preview.
- To preview the summary, click on the Preview Summary button.
- To preview the cards, click on the Preview Cards button.
- To Print out the summary and the cards, click on the Print Summary and Cards button.

# Entering Results of an Activity

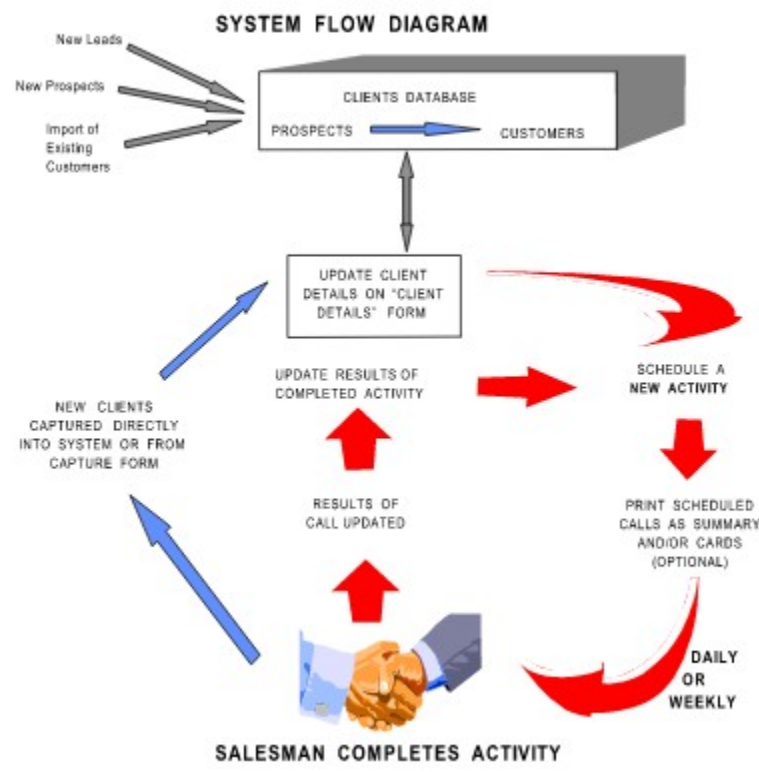
Recording call reports for completed activities is done from the Today's Schedule screen.

- Display the Today's Schedule screen.
- Select the Sales Person in the top left hand corner from the pull down list.
- Change the date in the top right hand corner to the date when the activity was scheduled for. This is done by clicking on the arrows, or clicking on the calendar to change the date. The scheduled activities for the selected salesperson and date are displayed on the screen. Timeless (i.e. with no specific time) visits and calls are displayed on the right hand side of the screen, and specific timed appointments are displayed on the left side of the screen.
- To mark the activity as complete, double-click in the blank block area just underneath the tick (check mark) and above the priority. Change the Time Taken for the activity by clicking on the down arrow and selecting the correct time. Change the status of the client if necessary. Add notes to the notes area. This includes all detailed activity information and is useful to represent your relationship with the client over a period of time. i.e. this is your "Call Report".
- Click on the Complete button to mark the activity as complete. A window will then appear confirming that you have completed the activity.

Note that "Y" (for Yes) now displays under the tick on Today's Schedule. i.e. the activity is complete.

**NB!!** Once a prospect activity is complete, it is important to schedule a New Activity to prevent the prospect from becoming "neglected". To do this, click on the New Activity button and schedule a new activity for this prospect.

# System Activity Flow





# Setting Up Your **Advantage** System

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This section documents all items that are required to set up the **Advantage** marketing system. This is particularly important in a corporate environment and should be one of the critical steps in the implementation process.

See [Important Setup Requirements](#)

- [Sales Staff](#)
- [Users](#)
- [Regions and Branches - Sales Department Structure](#)
- [Geographical Areas](#)
- [Products & Product Groups](#)
- [Promotions & Sources](#)
- [Client Types](#)
- [Group Names](#)
- [Industries](#)
- [Customer Call Cycles](#)
- [Client Data Items](#)
- [Status of Prospects and Customers](#)
- [Competitors](#)
- [Applications](#)
- [Standard Responses and Comments](#)
- [Designations](#)

# Important Setup Requirements

Designing the set up of your sales and marketing system is equivalent to designing the **Chart of Accounts** for an accounting system.

Inspect your current systems and research future requirements in order to extract the data (inputs) which are essential to produce the information (outputs) you require.

Investigate information requirements of all staff using the system including: Senior Management, Sales Management, Marketing Management and Sales Staff.

Your research should cover:

- existing sales staff call reports
- sales staff customer or prospect tickler cards
- any databases/lists of customers, prospects or leads - computerised or manual
- reports used by senior and sales management
- data to be used by marketing management for mailing/promotions  
(types of searches to be done on database)
- marketing management analyses



# Sales Staff

List names of all sales staff dealing with Customers, and Prospects. Double-click on the Sales Staff field to add Sales People.

Note that the Sales Staff ID must be the same as the Logon ID if the Salesperson is a User. You need to add the Sales Staff member's ID to the Users list.

Double-click to modify the Regions and Branches.

# Users

List names of all Users using the **Advantage** system. Each user consists of up to 6 letters. These letters will be the Logon ID for the User.

If Users are also Sales Staff members, then they need to be added to the Sales Staff list as well.

Users are persons logging into the **Advantage** program and physically "using" it.

Sales Staff members are salesman and representatives that will be benefiting from the system and receiving reports on a regular basis.

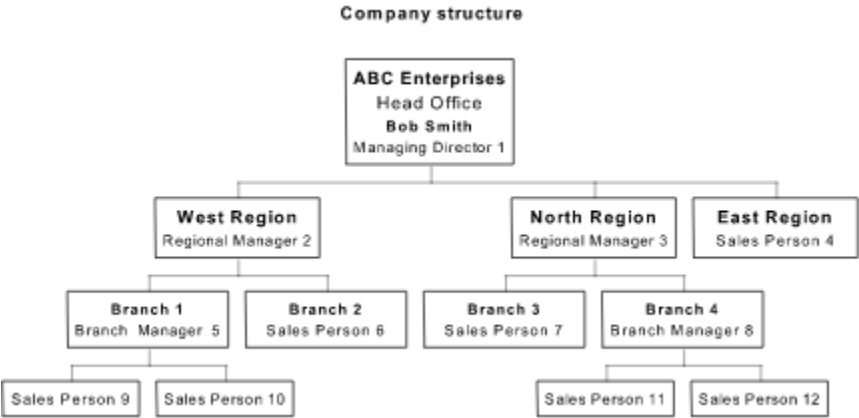
To add users is a two step process:

1. To add/modify the user list, log into **Advantage** as an Administrator and display the Today's Schedule screen. Click on the Security menu and select Edit Users. Add or modify the User Logon names.
2. Each user also needs to be added to the System Database. This is done by closing the Today's Schedule and Client Details screens by selecting File, Close from the menu. Select Security and Users from the menu at the top of the blank screen. Click on New to add a new User Logon name and a PID of 4 numbers. All users for the program should have the same PID. e.g. 1234.

Note that the User Logon ID must be the same as the Sales Staff ID if the User is also a Salesperson.

# Regions and Branches: Sales Department Structure

Use the regions and branches columns in the Sales Staff List to indicate the structure of the staff members within your organisation.



# Geographical Areas

Does your sales department use any geographical areas for managing their sales territories or for route planning? If nothing is currently used it is suggested that either general areas: North, South, East, West, City Centre or more specific areas: Sandton, Randburg, Isando, Germiston etc.

Each Area description must be unique.

To add Areas into your system, double-click on the Areas field.

Example:

<b>AREA CODE</b>	<b>AREA DESCRIPTION</b>
NS	Northern Suburbs
SS	Southern Suburbs
COE	East Coast

# Promotions & Sources

Develop a list of all possible sources of prospects or customers e.g.: advertising (specify each advertisement or media); cold calling; referrals - from customers, personal, from prospects; exhibitions, direct mail promotions.(specify only those currently in use)

These promotions and sources can be added by double-clicking on the Sources field.

Example

<b>CODE</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>
SUN	Daily Sun Newspaper	ADV
TVM	Morning Television	ADV
ETF	Electronics Trade Fair	EXH
TEK	Technology Exhibition	EXH
REF	Referral	REF

# Client Types

These are used to categorise your prospects and customers. Usually customers are defined by their value or potential value i.e. Top 20 customers are your **A** type customers etc. Prospects are also **typed** - you could for example categorise by length of expected sale cycle e.g.. long-term, medium-term and short-term prospects.

The third C/P column indicates whether this type is a Prospect or Customer type.

Define two sets of type codes - one for prospects and one for customers.

These client types are defined by double-clicking on the Client Type field.

Example

TYPE CODE	TYPE DESCRIPTION	C/P
A	A Customers	C
B	B Customers	C
C	C Customers	C
VAR	Value Added Resellers	C
SCN	Sub - Contractors	C
LT	Long-Term Prospect	P
MT	Medium-Term Prospect	P
ST	Short-term Prospect	P

# Group Names

Use this field to specify the group or holding company that the prospect or customer belongs to. The list can be modified by double-clicking on the groups field.

Examples

**Groups**

SAB

ANGLO

PREMIUM

## List of Industries.

Use this field to specify type of industry that the prospect or customer is involved in. The list can be modified by double-clicking on the Industry field.

Example

### **INDUSTRIES**

- Chemical
- Food and Beverage
- Computer
- Medical



# Designations.

Use this field to enter the contact person's designation. You are able to enter any designation into this field or select one from the pull down list. The list can be modified by double-clicking on the Designation field.

Example

## **DESIGNATIONS**

Managing Director  
Sales Manager  
Purchasing Manager  
Systems Consultant  
Stores Clerk  
Credit Controller  
Financial Director  
Administration Officer

# Customer Call Cycles

Call cycles are defined to specify a suggested servicing level. The system uses these cycles together with the last phone/visit date to generate service prompts. The Calling cycles for customers are entered in the Service Cycles window and by double clicking on the Cycle field. Service Frequency is measured in number of days. Hint: Try and use applicable cycle descriptions such as FM = face-to-face Monthly.

Example

<b>CYCLE ID</b>	<b>VISITS: In no of days.</b>	<b>PHONE CALLS: In no of days.</b>
FM	28	0
TW	0	7
TM	0	28
FW	7	0
FTM	28	28

## Reasons for lost sales

Develop a list of the reasons that sales were lost to competitors e.g.: lost to competitor ABC on price, lost to competitor DEF on features. Also list all reasons for which a purchase is cancelled (client decides not to buy) e.g.: client closed down, project cancelled, budget declined, no need.

When a prospect or customer is lost (State X or Y) then a form will display asking you for the reason the sale/customer was lost. These reasons can be changed or added by double clicking next to the Reason Lost field.

Example

REASON ID	REASON DESCRIPTION	REASON CATEGORY
TEXP	Lost to Texas: Price	X
TEXA	Lost to Texas: Availability	X
ABCP	Lost to ABC: Price	X
ABCA	Lost to ABC: Availability	X
BUD	Budget not approved	Y

# Sales Activities

Define all the activities sales staff perform in order to secure a sale for e.g.: **Follow up on proposal** or **Fax brochure**. These should correspond to the sales path. For example, if one of the statuses is **Demonstration**, then one of your activities would be **Demonstration**. The Sales activities are added by double-clicking on the Activities field. Note: Before using **Advantage** for windows, you need to define a list of all types of activities that can be performed by the sales persons. These can be defined by double-clicking on the Activity field that is displayed in the New/Edit Activity screen.

All the activities are grouped according to three types:

**F** - Face to Face activities

**T** - Telephone Activities

**C** - Correspondence Activities.

## Activity Examples

## Activity Examples

This list of available activities to do, should be set when you set up the rest of the system. The activities should be quite specific. E.g. Fax Brochure, General Meeting, Lunch Appointment, Courier Proposal.

The activities must be grouped as either an F, T or C activity. Similar types of activities can be grouped together by the Grp column. E.g. DEM for all types of specific demonstrations. The following table is an example of a list of activities:.

Example

ACTIVITY ID	ACTIVITY DESCRIPTION	ACTIVITY TYPE F/T/C
SV	Service Visit	F
ST	Service Telephone Call	T
CC	Courtesy Call	F
MC	Meeting Confirmation	T
GM	General Meeting	F

# Contact Function Coding

Do you need to categorise contact people by function? e.g.. sales, marketing, production, finance, or by level of management e.g.. senior, middle, operational or both. senior - sales, middle financial etc. This is normally used for targeting your promotions.

The contact function codes are added by double-clicking on the Function field in the **Client Details** screen. It forms part of a contact person's details.

Example

<b>FUNCTION ID</b>	<b>FUNCTION DESCRIPTION</b>
MAN	Managers
DIR	Directors
SAL	Sales Staff
ADM	Administration Staff

# Client Data Items

**Advantage** is a flexible system in that it can be set up to record any user-defined information for Customers and/or Prospects.

**STANDARD DATA ITEMS** Include

Company Name, Division, Date first contacted/Account Opened, Contacts and Addresses (multiple), Designation, Function Code, Salutation, Tel number, Fax Number, Other Number. E.g.. Cellular, Secretary, Anniversary Date, Postal Address, Physical Address, Language (E/A?), Salesman - Account Manager, Product of Interest (For Prospects only), Other products used/of interest (Multiple), Source, Area (geographical), Potential Sales Value (Prospects only.), Probability % (Prospects only.), Expected Sale Date (Prospects Only.), Sales Notes (dates/multiple), Industry, Group Name, Client/Prospect Type, Client/Prospect Status and Customer Account Number.

Additional Data can also be recorded.

First develop a list of all additional data to be recorded based on your research of existing or required information requirements.

# Additional Data

Two types of additional data (user defined) maybe required to customise the system to your requirements:

- Single data items
- Multiple lists of items



# Single Data Items

The following would be examples of single data items:

- Tender reference number.
- Application.
- critical dates - financial year end.
- production/usage volumes.

Single data items are entered in the System Administration Parameters screen. Fields one and two will accept numeric values, Field three is a date field and fields four, five and six will accept alphanumeric values of different lengths. To add/edit the pull down lists for fields 4,5 and 6, double-click on each of these fields.

Fields 4, 5 and 6 also contain look up lists and can accept entries of predefined lists of values.

# Multiple Data Items

The following are examples of typical lists of multiple items (i.e. many values per client) which are often required to be added to the data base.  
(you can however, add anything to this area):

- Potential Buying areas - list of the product groups which a client could buy.
- Hobbies & Interests - relationship profiles e.g.: Golf, cricket, send calendar.
- Group Affiliations - details on relationships to other companies or groups.
- Environment Information - details about the clients environment e.g.: size of production capacity, number of computers, type of computer network, type of manufacturing process.
- Purchasing Criteria/Process - what affects his buying patterns.
- Market Strengths - if this affects you marketing efforts.
- Competitor Info - who else is/was active on the account.
- Product Areas of Interest - lists of interest areas of particular contact people or clients.

These Multiple data items are entered and defined in the Profiles area.

See Examples of [Profile Categories](#) and [Profile Keywords](#)

PROFILE ID	PROFILE DESCRIPTION
SP	Sports
AP	Application
CO	Competitors
PM	Professional Memberships

PROFILE	KEYWORD ID	KEYWORD DESCRIPTION
SP	RUGBY	RUGBY
SP	CRICKET	CRICKET
SP	GOLF	GOLF
SP	TENNIS	TENNIS
AP	SEC	SECURITY
AP	EDU	EDUCATION AND TRAINING
AP	ENT	ENTERTAINMENT
CO	TEXAS	TEXAS INSTRUMENTS
CO	ABC	ABC ENTERPRISES

# Status of Prospects and Customers

**PROSPECT STATUS** - Sales Path. Applies to Prospects or Projects only. See Customer Status  
Develop a list of the steps which a typical prospect moves through from first contact through to completed sale.

NB!! It is important that this be debated with your sales team since it drives the prospecting function. This sounds easy but is often difficult to formalise. To help with this there are some sample sales processes developed by other customers: See Sample Sales Path 1 Sample Sales Path 2 Sample Sales Path 3

Generally the steps are similar - the terminology used however, should relate to your sales environment.

The Sales Path is entered under the Status field. Please note your major milestones are referred to as Status Descriptions and the detailed steps are referred to as Objectives. Example

All the tasks and objectives should be grouped into stages. The Status Codes must be unique to each stage, and they can make up a word if necessary - such as SPIN. There is no limit to the number of stages you can go through, however it is recommended to have less than 10 stages, preferably 5, for easier control and understanding.

States:           A = Active Prospect/Customer           S = Sold Prospect  
                  X = Lost to Competition               Y = Client decided not to buy

There are three ways in which a sale is completed i.e. Sold (State S), Lost to Competition (State X) or decided not to buy (State Y).

When a prospect reaches a completed (terminating) state the system purge facility will purge the prospect from the system and store it in an archive.

Completed prospects will remain in the system until purged.

# Customer Status

## **CUSTOMER STATUS**

The status field is also used for customers to indicate their current status

e.g.. New Customer, Valued Customer, Recommender, Archived/Inactive Customer etc.

Seq. No	Status Code	Description	Objectives	State (ASXY)	
1	C	Initial Contact	Detailed steps/tasks involved	A	
2	E	Establish Needs			A
3	P	Proposal Submitted		A	
4	N	Negotiation		A	
5	O	Order Received		A	
6	I	Installation		A	
7	S	SOLD		S	
8	L	Lost to Competitor		X	
9	NO	No Sale		Y	

First Call  
Meets qualifying criteria  
Forward product/company literature  
Literature received  
Decision maker (DM) defined  
Appointment granted with DM  
Needs Developed/Defined at appointment  
Solution (Proposal) prepared  
Appointment to present proposal granted  
Proposal presented  
Final negotiations  
Verbal order  
Written order  
Product Installed/signed off  
First post sale service call  
Customer moved to service cycle



Shows interest in service contract  
Shows interest in one-off service  
Shows interest in inspections  
Send/deliver brochure  
Arrange appointment  
Get order to assess/test equipment  
Assess machinery  
Generate cost of service/contract  
Deliver assessment report and cost  
Get order to service/contract  
Complete service  
Site inspection after service  
Equipment tested okay

Initial enquiry  
Develop specification/request tender docs  
Communicate intention to tender  
Develop tender  
Present Tender  
Tender Awarded  
Regular service/liaise technical staff  
Job begun  
Job complete  
Post sales visit  
Ask for references

## Products & Product Groups

Product ID's are used in your Customer Database to record details of your (and your competitor's) products or potential products at each customer.

Products are also used to record contracts renewable at customer: purchase contracts, service contracts, maintenance contracts, re-order prompts etc.

The products can be grouped into product categories using the group column. To add products, double-click on the Products field. These can also be imported from an ASCII file if necessary.

Example

<b>PROD ID</b>	<b>DESCRIPTION</b>	<b>GROUP</b>	<b>SELLING PRICE:Rec/Retail Price</b>
TV123	Colour Television	TV	1900
TVBW	Black and White Television	TV	300
VCRA	VCR Model A	VCR	2000
MTV	MTV Decoder	DEC	800

## List of Competitors.

Use this field to set up a list of your most common competitors. This is used to highlight which of your competitors have supplied your customers with products previously. Is is also used to indicate who you lost your sales to in terms of lost prospects in this system.

Example

### **COMPETITORS**

Anglo  
ABC Incorporated  
Premier Group  
B & G Wholesalers

# List of Applications.

Use this field to list what applications your customers are using your products for.

Example

## **APPLICATIONS**

Medical

Manufacturing

Education and Training

Security

# List of Standard Responses and Comments.

Use this field to list comments and responses that are used regularly. This is used when Scheduling New Activities and completing activities. The Comment and Result fields are used respectively in these screens to enter a standard response.

Example

## **STANDARD RESPONSES**

Remember to take samples with.

Activity cancelled/postponed

Call again to reschedule appointment!

Finds Product Very User-Friendly. Needs Quote.

Take new price list with!

# System Administration Form.

As part of your system setup you are required to complete the System Administration form. This sets default values for working within various areas of the software.

**Company Number** : Specify the number of the company your sales staff are part of.

If only 1 company, enter 1. This defaults to 1.

**Fin Year Start Date** : (Start of Financial Year) The start of your current financial year.

**Default Language** : The default language of most of your contact persons. e.g. E (English)

**Name of Custom Fields** : The labels for the fields that appear on the Client Details form.

**F-to-F Service Activity** : The Activity description that automatically generates for Face-to-Face Service cycles.

**Telephone Service Activity** : The Activity description that automatically generates for Telephone Service cycles

**Prod Agreement Expiry Activity** : The Activity description that automatically generates for Agreement Expiry dates.

**Prod Re-order Activity** : The Activity description that automatically generates for next re-order dates.

**User Details** : Views/Edits the list of users.

**Targets** : This button enables you to set targets for your sales staff.

**Using Microsoft Schedule+** : Click if you are going to link the activities to Microsoft Schedule+.

This can be set to Yes (Using Schedule+) or No (Not using Schedule+).

**e**



# Orientation to the Windows System

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The objective of this chapter is to familiarize yourself with the Windows operating environment within the **Advantage** Application.

## FORMS

- Menu Bar
- Toolbars
- Min/Max Button
- Status Bar
- Cut Copy and Paste
- Horizontal and Vertical Scroll Bars
- Pull Down Lists
- Command Buttons
- Filters
- Sorting
- Searching

## REPORTS

- Setting up your Printer
- Previewing Reports
- Printing Reports
- Transferring Reports to MS Word

# Menu Bar

The **Title bar** appears along the top of your window and displays the name of the program and screen.

I.E. **Advantage** Clients. The **Menu bar** follows on the next line with the words:

**File   Edit   View   Clients   Window   Help**

Clicking once on each of these words will display a pull-down menu allowing you to select one of the options required. Try clicking on the File menu.

# Toolbars

**Toolbars:** The Toolbars are usually displayed under the menu bar. However sometimes they can be displayed along the left side, right side or the bottom of the screen. They can also be moved to any of these locations as well. Moving the mouse pointer onto the tool for a few seconds will display a

**Tooltip** briefly describing what the function of the tool is.



**Please refer to the Toolbars reference.**

# Min/Max Button

**Min./Max. Buttons:** The Min./Max. buttons allow a window to be full screen (Maximized) or an icon (Minimized). On many occasions you will probably open many windows at the same time. Each of these windows can be Maximised or minimised. When maximised, the window fills the whole screen. When minimised, the screen is reduced to the size of an icon. This icon can be maximised (full screen) or restored to its original size.



# Status Bar

**Status Bar:** The Status bar is located along the bottom of the current window. This displays any important or helpful messages. It also displays the number of the record you are currently working on, and how many total records there are in the file that is currently open.

E.g.: Current record working on: 295 Number of total records : 3343.

- The left arrow with the bar moves to the first record in the file.
- The left arrow moves back to the previous record.
- The right arrow moves to the next (or new) record.
- The right arrow with the bar moves to the last record.

You can also move directly to a specific record by clicking on the current record number, deleting it and changing it to another number and pressing Enter.

E.g. Change 295 to 376.

# Cut Copy and Paste

**Cut Copy and Paste** Any information/data typed in any field can be cut or copied to the clipboard and pasted into a different location.

This saves retyping information over again therefore saving time.

First Highlight the text you wish to copy or cut (Delete).

This can be done with the mouse.

After highlighting the text, to delete it press Delete or the Cut button on the toolbar.

To copy the text to the clipboard, press the Copy button (Ctrl-C).

The clipboard is a temporary storage space. When copying information you would use copy and paste.

Paste always copies what is stored in the clipboard to the cursor location.

To copy the text, move the cursor to the field you wish to copy to, and press the Paste button (Ctrl-V).

**Cut = Delete, Copy = Ctrl-C, Paste = Ctrl-V**

# Horizontal and Vertical Scroll Bars

**Horizontal and Vertical Scroll Bars:** These bars are represented along the bottom of the window (Horizontal) and/or down the right side of the window (Vertical). They allow you to view any additional information within the window that is not displayed because of the window size.

Example: When viewing notes or information in datasheet view, there is a Vertical Scroll bar down the right hand side of the window, and/or sometimes a Horizontal Scroll bar along the bottom. You can scroll up, down, left or right depending on which arrow you click on. When using the keyboard, use arrow keys to move within the window.

# Pull Down Lists

**Pull Down Lists:** These are displayed to the right of each field that has a small arrow pointing down. They allow you to display a list of options to select from, where you would select one by clicking on the required entry.

If you wish to add any more entries in the list, delete or modify existing entries, you would double-click on the small arrow. (Click the left mouse button twice quickly). This would display a small screen allowing you to add, delete or modify any entries. To add new entries, move the cursor to, or click on the \* (asterisk) displayed at the end of the list, and start typing.

To modify any entries, click on the word or field and make your changes.

To delete any entries, click on the gray block on the far left hand side of the window to move the pointer to the current record, (This pointer will always indicate which is your current record.) and press delete.

(If a (no entry) sign is displayed, this means that someone else is working on this record on the network.)



# Command Buttons

**Command Buttons:** Many options on the screens have command buttons that perform various functions within the program. These command buttons may have a picture or word(s) displayed on them. To select the option or function, just move the mouse pointer to the button and click on it. If using the keyboard, press the TAB key a few times until it is highlighting the command button. Examples of command buttons:



**EXIT** (Exit Door)

**PRINT PREVIEW**

**ADD NEW CLIENT**

# Filters

When viewing data on the screen, you may wish to view specific data only. i.e. Only the Customers who are in the CAPE area, or only the Customers who are using Product A.

You can create and save your own filter criteria using the Filter buttons on the toolbar. (Top of screen) These are the **Edit Filter/Sort**, **Apply Filter** and **Show All Records** buttons.

To Create your own filter, click on the Edit Filter/Sort tool and you will then be able to specify your criteria in the next screen. This filter can be saved for future use by clicking on the Disk button on the toolbar, and giving it a relevant name. After clicking on the Apply Filter button on the toolbar to execute the query, only the customers who match the criteria will be accessible.

These Customers can be viewed in Datasheet view by clicking the Datasheet View button on the toolbar.'

The Show all Records tool disables the filter and allows access to all Clients on the database.

# Sorting

All records displayed on the screen can be sorted according to any field. First move the cursor to, or move the mouse pointer and click on, the required field you would like to sort on.

Click on one of the Sort buttons on your tool bar depending on whether you would like the records to be sorted in Ascending (A-Z,0-9) or Descending (Z-A,9-0) order.

Ascending  Descending

# Searching



Probably one of the most common requirements will be to look for or find a customer or any item of information in the database.

1. Position your cursor on the field you wish to search on first, then click on the find button.
2. After clicking on this button, a dialog screen asks you for a few items of information.
3. We can specify whether the text is the **complete name**, **part of the name** or the **start of the field**. This is specified next to the **Where:** prompt.
4. Start the search by clicking on the **Find First** button.
5. Keep an eye on the Status bar as this will tell you whether the Search was successful or not. If it was successful, the words "Search Succeeded" will be displayed.
6. To view the record, click on the **Close** button.
7. If the record displayed is not the correct one, select Find again and click on the **Find Next** button.  
The search direction can go Up or Down depending on the Direction specified.

# Setting up your Printer

It is recommended that you set up your printer **first** to see if whether windows is set up with the correct printer drivers to match the printer you are using. If not you will have to change the printer setting to match the printer you are using.

Once you have clicked on the **Print Setup** button, change the printer by selecting Specific Printer or Options.

## Printing Reports

To Print a report, click on the desired report so that the black dot to the left of the report is filled in, and click on the **Print** button.

This will send the report directly to the printer without displaying it on screen.

# Previewing Reports

Any report can be previewed on screen before printing it. It is recommended that you use this option most of the time as the report can be printed after previewing. Select your report and click on the **Print Preview** button. The report is then displayed on screen as it would look when printed on paper. The display will be zoomed in to show a magnified portion of the report. To view the complete page, move the mouse pointer which will look like a magnifying glass to the middle of the screen and click once. A complete page will then be displayed allowing you to move the pointer and "zoom in" to any portion of the report if necessary.

The Status bar indicates what current page is displayed and allows you to move forward to the next page, backwards to the previous page, to the first page or to the last page in the same way as your Records. To print the report to printer click on the "Print" button on the toolbar. To check your printer settings, click on the "Print Set up" button to the right of the "Print" button.

# Transferring Reports to MS Word MS Excel and MS Mail

Any **Advantage** Forms or Reports can be directly transferred to MS Word, MS-Excel or sent via MS Mail to be changed and modified if necessary.

Once you have the Report/Graph displayed in Print Preview mode, this report can be transferred by clicking on one of the applicable buttons on your toolbar. After selecting one of these Output options a screen will display saying that the report is currently being transferred to MS Word, MS Excel, MS Mail etc. After outputting your report, MS Word or MS Excel is then loaded and you will exit temporarily out of **Advantage**. **Advantage** will return once you exit out of MS Word, or MS Excel. MS Mail however does not open.

Note you can also transfer data displayed on forms. For example, using the datasheet view of the Client Details form you can sort the data, arrange the columns as required and then export the data to a spreadsheet file e.g. for MS Excel.



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# Today's Schedule

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- Overview of Today's Schedule
- Selecting the Salesman for Today's Schedule
- Selecting the Date for Today's Schedule
- Using the Calendar for Date Selection
- Completing Scheduled Activities
- Editing Scheduled Activities
- Scheduling New Activities
- Posting New Activities to MS Schedule +
- Viewing the Client Details for a Scheduled Activity
- Creating a New Client from Today's Schedule
- Today's Schedule Toolbar
- Exiting out of the **Advantage** program

# Overview of Today's Schedule

The main function of **Advantage** is to manage clients (Prospects and Customers) and all activities associated with these clients. There are two main "views" that are available in **Advantage**. The first "Today's Schedule" is the activity control centre performing the activity management function. The second is the "Client Details" view for managing of all client related information. This section addresses Today's Schedule and all other functions associated with activity management.

The Today's Schedule is the first screen (apart from the title screen) that is displayed when a user starts the **Advantage** program. This displays:

- SCHEDULED ACTIVITIES (time related) on the left, and
- TIMELESS ACTIVITIES (no time specified) on the right.

The main purpose of this screen is to display all the activities that need to be completed for today. This should be viewed at the beginning of every day for planning purposes.

The following functions can be performed here:

- completing activities,
- modifying activities,
- viewing the details of the client,
- viewing activities for different days.

All activities are displayed on the screen for the selected sales person for the selected date. Any activities for clients listed can be modified (double-click on the activity description), completed/incompleted (double-click under the "tick" column), or the details of the specific client can be viewed (double-click on the client name). If an activity is completed, a Y (for Yes) will be displayed under the tick for the client.

Activities that are time related. E.g. Meetings, Presentations.

Activities that can be performed at any time during the day.

## Selecting the Salesman for Today's Schedule

Activities on the Schedule for today are displayed by sales person. Select the sales person for whom today's activities are to be viewed using the "Schedule for:" list box. This defaults to the sales person who has logged in.

## Selecting the Date for Today's Schedule

Activities on Today's Schedule are displayed for a specific date. The current date for the activities is displayed in the top right hand corner of the screen and defaults to today's date. This date can be changed one day at a time by clicking on the up or down arrow for the previous or next day respectively. You can also click on the [Calendar](#) button just to the right of the date. This will display a calendar allowing you to select a specific day, month or year directly without scrolling through the dates one day at a time.

## Completing Scheduled Activities

Existing activities can be completed from this screen as and when you are performing them, or at the end of the day. To complete an activity, **double-click under the tick column**.

Enter you call report (See "[How to Manage Activities](#)"), then click on the Complete button to mark the activity as complete and return to the Today's Schedule screen.



## Editing Scheduled Activities

The details of any existing activities can be changed or modified from this screen if necessary. To modify an existing activity, **double-click on the activity description for that activity.** Make any changes, such as Activity, date, time, priority, contact person etc. then click on the exit door, to return to the Today's Schedule screen.

## Scheduling New Activities

Create a New Activity **by clicking the New Activity button (Handshake)** on the toolbar. After clicking on this tool, the New/Edit activity screen is then displayed allowing you enter details of any new activity. Note that the Salesman automatically defaults to the current salesman selected on Today's Schedule. Enter your activity details and click on the exit door when finished.

## Viewing the Client Details for a Scheduled Activity

The details of any specific client displayed on the Today's Schedule screen can be viewed or edited. Immediate access to a client's details is obtained by **double-clicking on the company name area** of that activity.

To Exit back to Today's Schedule from Client Details, Click on the Exit door in the top right corner.

## Creating a New Client from Today's Schedule

You may create a new client while on the Today's Schedule form. This can be achieved by **clicking the New Client button on the toolbar**. After clicking on this tool, the Client Details screen is then displayed allowing you enter the details of a new client. All the details are left blank allowing you to input new information. Enter your client details and click on the exit door when finished.

## Exiting out of the **Advantage** program

The Exit door on the top right hand corner to the right of the Calendar button exits out of the **Advantage** application completely, back to your windows program manager.

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# Client Details

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## Client Details Introduction

- Details of Fields on Main Screen
- Creating a New Client
- Additional Contacts
- Scheduling a New Activity for the Active Client
- Creating a Prospect from a Customer
- Additional Tools
- Client Products
- Client Agreements
- Client Budgets
- Client Invoices
- Client Activities
- Client Service Cycles
- Client Profiles
- Filtered Clients
- Generate Servicing Activity
- Client Details Toolbar Summary

# Client Details Introduction

There are two main functions of **Advantage** - managing clients (Customers and Prospects) and managing activities associated with these clients. **Advantage** is thus constructed with two key views or control centres. The Client Details screen is the client control centre for management of all Client information. Activity Management is done through the second view - the Today's Schedule screen.



# Details of Data Items on the Client Details Screen

This screen is used to display and input detailed information about the client. It is also used to load, edit and view all client related information. Note that there is a second page of information. This can be viewed by clicking on the down arrow on the right hand side of this window.

[Customer / Prospect Toggle](#)

[Company or Individual Name](#)

[Date Opened](#)

[Main Contact Person](#)

[Title](#)

[First Name](#)

[Initials](#)

[Surname](#)

[Language](#)

[Designation](#)

[Function](#)

[Secretary](#)

[Anniversary Date \[Ann\]](#)

[Telephone Number](#)

[Other Number](#)

[Client Notes](#)

[Main Product of Interest and related information.](#)

[Address](#)

[Customer Number](#)

[Sales Staff](#)

[Client Type](#)

[Status](#)

[Source](#)

[Group Name](#)

[Industry](#)

[Area](#)

[User Defined Fields](#)

[Fax Number](#)

[More Contacts](#)

[Reasons Lost](#)

See also [Contact Details](#) and [Further Client Data Items](#).

**Customer / Prospect:** This field is used to indicate whether the client is a prospect (potential customer) or an existing customer. Please note that the term clients in this manual refers to both customers and prospects.

**Sales Staff:** This field indicates the staff member who is responsible for this account. Note that many different salespersons can service the client, however the sales person indicated in this field has access rights to edit all data about the customer. Other sales persons and servicing staff who may also work with the same client can add new data but cannot change or delete the client data. The sales person can be changed if necessary. This is selected from the pull down list by clicking on the down arrow to the right of this field. The staff list can be modified by double-clicking on this down arrow. A staff member can then be added, removed or changed on this list.

**Cust No:** Customer Number - This field indicates the Customer Account Number or Debtor's Number of the client. It is not necessary to capture an account number if this is a prospect - this field will be skipped over if you are capturing a prospect. This field is used to transfer data from other systems into **Advantage**. E.g. Importing sales history. This field is indexed and therefore can be used for quick searches.

**Date Opened:** This field is used to indicate when the client was first captured.

**Company/Individual:** This field is used to record the name of the client company or Individual. Click on the field name to change. This may be the name of a company or the surname if the client is a private individual. E.g. SMITH. This field is also indexed allowing for quick searches on this field.

**Division:** This optional field is used to record the name of the specific division or department within the company of the main contact person whom you are dealing with.  
Useful if you are dealing with different departments of the same company.  
E.g. Head Office.

# Contact Person Details

**Main Contact Person:** This field on the Client Details screen is used to indicate who the main contact person is. This defaults to 1 when the client is first captured. Once other contacts have been captured then the main contact person can be changed by selecting from the attached pull down list. This in turn will update the rest of the related fields such as Title, Surname.

**Title:** The title of the contact person. E.g.: Mr., Mrs., Ms.

**First Name:** The contact person's first name.

**Initis:** Initials: the contact person's initials. Up to 5 letters can be recorded here.

**Surname:** The contact person's surname.

**Lang:** Language - The contact person's preferred language. Only 1 letter can be recorded here.

**Designatn:** Designation - The contact person's designation or job title. The title can be typed in this field or can be selected from one of the choices in the pull down list. This pull down list can also be modified if necessary. See [Designations](#)

**Function:** The contact person's function within the organisation. E.g. Management, Sales, Secretarial, Technical. The function must be selected from one of the options in the pull down list. To modify or add entries to the pull down list, double-click on the down arrow. See [Functions](#)

**Secretary:** The name of the contact person's secretary. Very useful when selling.

**Ann:** Anniversary Date - Use this to record a date relating to the contact person. E.g. Birthday.

**Tel No:** Telephone Number - The contact person's business telephone number. Include dialing code if not local. E.g. 011-886-8866

**Fax No:** Fax Number - The contact person's fax number. Include dialing code if not local.

**Other No:** Any other number for the contact person such as a cellular or pager.  
See also [Details of all Fields on the Client Details Screen](#).



## Further Client Information

**Client Type:** Use this to categorize your clients

These client types are all user-defined. A different set of client types is defined for Prospects (P) and Customers (C). Double click on the pull down list to modify these client types. See [Client Type](#)

**Status:** This is used to indicate the status of "Prospects" in the sales cycle.

This can also be used to indicate the status of "Customers".

These status codes are also user-defined and can be modified by double-clicking on the down arrow. See [Status](#)

**Source:** Used to indicate how the client originally heard about your organisation. E.g. Newspaper Advertisements, Referrals, Magazine Articles, Exhibitions. These could be very specific to include the name of the newspaper, the edition, or the name of the exhibition and year. This information is very useful for analysing the source of prospects providing information on the current market and for future strategic market decisions. See [Source](#)

**Group Name:** This field is used to indicate what group the client belongs to, or the name of the holding company. Select a valid group from the pull down list. See [Groups](#)

**Industry:** Used to indicate the industry field the client is involved in. E.g. Mining, Electrical. Select an industry from the pull down list. See [Industries](#)

**Area:** Used to indicate the geographical location of the client. They can be towns, cities, suburbs, provincial definitions, or any other user-defined areas. Select an area from the pull down list. See [Areas](#)

**User-defined fields:** The following 6 fields are user-defined.

The names of these fields can be changed to suit your organisation.

To change these names, click on the System Administration tool on the toolbar. Note that these 6 fields contain different types of information. Fields 4, 5 and 6 also have pull down lists attached to allow entry of predefined lists of values. See [Additional Data](#)

**Client Notes:** Contact reports for each client contact are recorded here. Each note has it's own Sales Person, Contact Person and Date. Any number of lines can be captured in the detail notes area for one date.(Call Reports).

All information relating to the same Contact person and the same Sales person for the same date, must be captured as one set of notes. The most recent set of notes are displayed in this window first, with the rest of the notes listed underneath - from the most recent to the oldest.

**Main Contact Person:** This field is used to indicate who the main contactperson is. This defaults to 1 when the client is first captured. Once other contacts have been captured then the main contact person can be changed by selecting from the attached pull down list. This in turn will update the rest of the related fields such as Title, Surname.

**Title:** The title of the contact person. E.g.: Mr., Mrs., Ms.

**First Name:** The contact person's first name.

**Inits:** Initials: the contact person's initials. Up to 5 letters can be recorded here.

**Surname:** The contact person's surname.

**Lang:** Language - The contact person's preferred language.  
Only 1 letter can be recorded here.

**Designatn:** Designation - The contact person's designation or job title. The title can be typed in this field or can be selected from one of the choices in the pull down list. This pull down list can also be modified if necessary.



**Function:** The contact person's function within the organisation. E.g. Management, Sales, Secretarial, Technical. The function must be selected from one of the options in the pull down list. To modify or add entries to the pull down list, double-click on the down arrow.

**Secretary:** The name of the contact person's secretary. Very useful when selling.

**Ann:** Anniversary Date - Use this to record a date relating to the contact person. E.g. Birthday.

**Tel No:** Telephone Number - The contact person's business telephone number. Include dialing code if not local. E.g. 011-886-8866

**Fax No:** Fax Number - The contact person's fax number. Include dialing code if not local.

**Other No:** Any other number for the contact person such as a cellular or pager.

Click on this **More Contacts** button, to capture and record details for any additional contact people for this client.  
See [Additional Contacts](#).

**Client Type:** Use this to categorize your clients into various groups, such as...

- End Users
- Dealers
- Distributors
- Contractors
- Sub-contractors
- A Customers
- B Customers
- C Customers
- Top 20 Customers
- Agent

These client types are all user-defined. A different set of client types is defined for Prospects (P) and Customers (C). Double click on the pull down list to modify these client types.



**Status:** This is used to indicate the status of "Prospects" in the sales cycle. Example:

- First contact,
- Demonstration given,
- Quoted,
- Ordered etc.

This can also be used to indicate the status of "Customers".

These can be defined as, for example:

- New Customers
- Valued Customer
- Advocate
- Archived/Inactive Customer

These status codes are also user-defined and can be modified by double-clicking on the down arrow.

**Source:** Used to indicate how the client originally heard about your organisation. E.g. Newspaper Advertisements, Referrals, Magazine Articles, Exhibitions. These could be very specific to include the name of the newspaper, the edition, or the name of the exhibition and year. This information is very useful for analysing the source of prospects providing information on the current market and for future strategic market decisions.

**Group Name:** This field is used to indicate what group the client belongs to, or the name of the holding company. Select a valid group from the pull down list.

**Industry:** Used to indicate the industry field the client is involved in. E.g. Mining, Electrical. Select an industry from the pull down list.

**Area:** Used to indicate the geographical location of the client. They can be towns, cities, suburbs, provincial definitions, or any other user-defined areas. Select an area from the pull down list.

**User-defined fields:** The following 6 fields are user-defined.

The names of these fields can be changed to suit your organisation.

The field types are as follows:

Field 1: (numeric)	E.g. No of Vehicles.
Field 2: (numeric with 2 decimal places)	E.g. Budget
Field 3: (date)	E.g. Financial Year/End
Field 4: (Alphanumeric 6 with pull down list)	E.g. Product Group
Field 5: (Alphanumeric 10 with pull down list)	E.g. Financial Institution
Field 6: (Alphanumeric 20 with pull down list)	E.g. Application

To change these names, click on the System Administration tool on the toolbar. Note that these 6 fields contain different types of information. Fields 4, 5 and 6 also have pull down lists attached to allow entry of predefined lists of values.

# Client Notes

**Client Notes:** Contact reports for each client contact are recorded here. Each note has it's own Sales Person, Contact Person and Date. Any number of lines can be captured in the detail notes area for one date.(Call Reports).

All information relating to the same Contact person and the same Sales person for the same date, must be captured as one set of notes. The most recent set of notes are displayed in this window first, with the rest of the notes listed underneath - from the most recent to the oldest.

# Main Product of Interest

Specify the main product of interest for theClient. Customer related products are recorded under the products window. Where more than one product is quoted on a sale, a list of all items can be entered in the client products window as "Potential" products. These can be used to generate a detailed product level forecast.

**Main Product of Interest:**

Used to select the main product of interest from the pull down list.

**Potential Value:** The potential value of the sale.

**Probability %:** The percentage probability that the sale will be won.

**Exp. Sales Date:** The Expected sale date.

The above information is important for the Prospect Forecast Reports.



## Client Postal and Physical Address Details

These address details relate to the Contact Person selected on the previous screen.

**Postal Address:** The contact person's postal address. (3 lines and the Post Code).

**Physical Address:** The contact person's physical address. (3 lines and the Post Code).

## Reason Client Lost

When a prospect is changed to a sold or lost status or a customer is changed to a lost status, these details are requested and displayed in this area.

**Date Sold/Lost:** Enter the date when the sale occurred or when it was lost to a competitor.

**Reason Lost:** Select a reason why the sale was lost. This can be selected from the attached pull down list.

**Lost to:** Select the name of the competitor the sale was lost to. This can be selected from the attached pull down list.

**Value of Sale:** Enter the value of the sale.

# Creating a New Client

There are various ways to create a new client record on this Client Details screen.

- Click on the Add New Client button on the toolbar.  
(Also available on Today's Schedule).
- Click on the Add New Client button near the top right corner of the screen.
- Click on the New Record (>\*) button on the toolbar.  
A clean Client Details form will then be displayed for capture of a new client.

The symbol near the top left hand side of the screen can be one of three symbols:

- The **Pencil** indicates that you are currently adding or changing the current record.
- A **no entry symbol** indicates that another user is currently using this record, and you cannot change anything until that user has finished.
- The right arrow indicates that this is the current selected record.

## Additional Contacts

To view or add further contact persons at the same client, click on the **More Contacts** button.

See Contact Details and Division for more information.

**Cancel:** This button cancels any changes made to one contact person's details, or clears the screen if entering a new contact person's details.

**New Contact:** This button enables you to add a new contact person to your list.

**Table View:** This button enables you to view the list of contact persons in table format. This is useful if you need to view more than one person's details at a time. You can also add new contact persons in this view.

**Note:** Should you wish to change contact details of all contacts. e.g. if all contacts have the same new address - use the option under the Clients menu called "Change All Contact Details"

## Scheduling a New Activity for the Active Client

The active client is the client currently displayed on the screen. This is sometimes referred to as the current record. To schedule a New Activity for this client, click on the New Activity button (Handshake) on the toolbar. The sales person, company, and contact default to the values of the active client.

## Creating a Prospect from a Customer

When a new sale occurs at an existing client (customer or prospect), then a prospect can be created automatically from this client. This facilitates tracking and management of the new sale. Click on the Create Prospect from Customer button on the toolbar.

Select your requirements and click on the OK button. This will create a totally separate prospect from one of your existing clients, so that you can accurately track the progress of the prospect's sale, without involving the customer. You are also able to create any number of prospects from the same customer for individual sales tracking. Each prospect would be treated individually, and link back to the customer once they become sold to update the existing customer record.

## When a Prospect becomes Sold.

When a prospect reaches a SOLD Status, one of 2 things happen.

The details of the Sold Prospect are transferred across to the existing Customer Record, so that the existing customer record reflects the latest dealings and information on any new sales that have taken place.

A New Customer record is created from this Sold Prospect. This will create a totally separate customer from your existing prospect. This will enable you to manage the details of this new customer separately from the Sold Prospect. This is useful because you could have more than 1 prospect from the same customer.

# Additional Tools

[Viewing Client Details in Table view.](#)

[Sorting Data](#)

[Defining a filter to view selected clients.](#)

[Finding Client Information](#)

[Autodial](#)



To view clients in a table or spreadsheet view, click on the Datasheet view button on the toolbar. Use this view to scan clients. The sort and filter functions to view specific groups of clients are available for use.

Currently the clients are listed in Ascending alphabetical order based on the Company Name. Click on the Company Name field, and click on the Descending Sort button on the toolbar. The clients should now be listed in descending order based on the Company Name. To list the data in any other order, move the cursor to, or click on the appropriate field or column and click on the Ascending or Descending sort buttons.

This facility applies to Form view and Datasheet (Table) view.

Click on the Edit Filter/Sort button on the toolbar. This screen will allow you to create your own custom filter to view selected clients. E.g., All clients who are in the CENTRAL Area.

A customised list of clients can also be viewed by clicking on the Filtered Clients button. This feature calls up the client details screen and displays details of all the clients that exist in the selected list.

The following window is displayed so that you can select a list created with the Mail List Management feature.

Note that this feature allows you to define very complex search criteria in a very easy manner - using push-buttons and "point and click" selection techniques. Note that the list entries are selected when the list is created and not refreshed when you use the list.

To Select a list:

1. Select the List of Clients required from the pull down list.
2. Click on the Display Clients button to display these clients on the Client Details screen.

Click on the Find button **Binoculars** on the toolbar to search for information that exists in the current field or any other field.

This allows you to dial your client directly from your computer - providing your computer has the necessary hardware installed such as a modem. To use this facility, highlight the applicable telephone number you wish to dial using the mouse, and click on the Autodial button on the toolbar. To start dialing click on the OK button. The **Setup** button is used to define your modem settings, dialing type, and port where your modem is connected. Use the defined prefix if dialing from a different area code prefix. To start dialing click on the OK button.

# Changing All Contact Details

Use this function to change contact person information for all contact people for the selected client . Addresses, Tel No's, Fax No , Division and language details can be changed . To use this facility clickon the window menu and select **Change All Contacts Details**.

Select the desired client and the details you wish to change for that client. Thereafter click on the "Enter New Contact Details" button .

Supply the new contact details and click on the "Change Contact Details" button. Use this feature to change contact details when, for example, a company has changed their physical location etc.

# Client Products

Click on the Products button on the toolbar to record all product details for the client. Use this product area to list the products used by the client. You can also list the products, quantities and prices of competitor products used. Products of potential future interest can also be captured. For prospects a detailed list of all items quoted can be captured here.

**Prod ID:** Enter here the product code - or select from the pull down list. You can double-click on the down arrow next to the product to modify or add new products to your master product list (Administrator only).

**Description:** The description of the product from the product list is displayed under the Prod ID.

**O/C:** This column indicates whether the product is supplied by you or the competitor. O=Own Product, C=Competitor Product.

If the product was supplied by the competitor, specify the name of the competitor in the next column.

**Competitor:** This column allows you to select the Competitor who supplied the competitive product to the client. This competitor list can be edited by double-clicking on the down arrow next to competitor.

**C/P:** This column indicates whether the product is a Current product that the client has already purchased and is already using, or a Potential product that the client is interested in purchasing from you in the near future. **C** = Current Product, **P** = Potential Product of interest.

For Current Products, complete the Current Qty and Current Price columns.

For Potential Products, complete the Pot Sale Value and % Prb columns.

[More ...](#)

## Client Products ... page 2

### Potential Products:

**Pot Sale Value:** This column indicates the Potential Sale Value of a potential product of interest.

**% Prb:** The Probability % of the client purchasing the potential product of interest.

**Expected Value** = Potential Sales Value \* Probability %.

### Current Products:

**Current Qty:** The Current Quantity of products the client is currently using.

**Current Price:** The current price of the current product the client is using.

**Frequency of Purchase:** Used to indicate how often the product is purchased in months.

**Annual Value**= Current Quantity \* Price \* 12/Frequency (in Months).

**Date Last Updated:** Used to indicate the most recent date when the Frequency of Purchase or Current Quantity or Current Price fields were last updated.

**Prod/Agr Number/Serial Number:** Used to specify a unique product serial number or contract/agreement number to uniquely identify a specific product. This is an indexed field.

**Application:** Used to specify the application that the product is used for from a pull down list if necessary.

**Frequency of Purchase:** Used to indicate how often the product is purchased during the agreement period.

**Date Last Updated:** Used to indicate the most recent date when the Frequency of Purchase or Current Quantity or Current Price fields were last updated.

[Back to first page.](#)



# Client Agreements

Click on this Client Agreements button on the toolbar to view or edit any agreements or contract information. All **Own** and **Current** products specified under client products are displayed here. Additional information relating to products can be added here including: agreement details, reorder information, product contact person, product notes. An important function relating to this information is the ability to generate service prompts for contract/agreement expiry dates and reorder dates recorded on this form. Management reports on expiring contracts/agreements and re-order quantities are also generated from this information.

**Product:** Used to specify the product involved in the agreement, contract or reorder cycle. Select the product ID from the attached pull down list. This master product list can be edited by double-clicking on the down arrow next to this field. The product description is displayed next to the product ID.

See [Agreement Details](#) for more information

Also See [Reorder Details](#) for more information

# Agreement Details

Note that **Advantage** will automatically create a renewal service based on the agreement expiry date.

**Type:** Used to specify the Type of agreement. Up to three (3) letters can be used. E.g.. R for Rental, MAI for Maintenance, INS for Installment Sale.

**Prod/Agr No:** Agreement Number - used to specify or record a unique product number e.g. serial number, number of the agreement, policy number, or document number.

**Start Date:** The starting date of the agreement.

**Expiry Date:** The date when the agreement or contract expires. The **Generate Services Activity** function will use this date to generate a prompt for sales staff to follow up on this expiry date. See also the [Agreement Expiry Report](#).

**Quantity:** The number of units involved in the agreement.

**Price:** The price of the agreement.

**Application:** Used to specify the type of application that the product is used for.

**Frequency of Purchase:** Used to indicate how often the product is purchased during the agreement period.

**Date Last Updated:** Used to indicate the most recent date when the Frequency of Purchase or Current Quantity or Current Price fields were last updated.

**Reason Contract Expired:** Used to specify why a contract is expired. E.g. Lost to competition.

**Edit Budgets:** This button allows access to the Budgets/Actuals area for the client.

See [Client Agreements](#)

## Reorder Details

Many clients re-order products from their suppliers on a regular basis e.g. consumables such as stationary. Use this section to specify reorder details so that proactive services can be done to generate orders. Note: It is recommended that this re-ordering information be updated by imports of sales invoices from your financial systems in order to maintain its accuracy. Forecasts can be generated and Stock levels checked. **Advantage** will also automatically create product re-order service prompts for your sales staff.

**Re-order Qty:** Re-order Quantity - the number of units the client re-orders on a regular basis.

**Re-order Cycle (Days):** The number of days between each order.

**Last Order Date:** The date when the last order was placed.

**Next Order Date:** The date when the next order should be placed, based on the re-order cycle.

**Advantage** automatically calculates this for you. The **Generate Services Activity** function uses this date to generate a prompt for sales staff to call for an order.

**Contact:** The contact person at the client who deals with product agreements and product re-orders.

**Details:** Any notes and other important information necessary with regard to the agreements and re-orders.

See [Client Agreements](#)

## Client Budgets

Click on the Client Budgets/Actuals button on the toolbar to view any Budget and Actual Values and Units. This form accumulates monthly totals (in units and values) for each product sold to a client. This is input either from imports of monthly totals or invoices. Note that **Advantage** can import data from any financial system.

Monthly budgets per client and product can also be imported (or entered) here. Combining financial information with **Advantage** information is a powerful function for sales staff. It means that all information relevant to the sales process is drawn together in one place and reproduced on customer call cards. **Advantage** is designed to support the sales person so this can be a critical attribute of the system. This should thus be part of the Set up process for your implementation plan.

This area is used to record and display Budget and Actual Values and Units over the 12 financial periods (Months) of your financial year.

See Budget and Actual details for more information.

Enter a new record for each different Sales Person and product, for budgets and actuals.

Double-click on the Actuals amount for any period to view Invoices for the current Client that have been **imported** into **Advantage**. See Client Invoices.

# Budget and Actual Details

**VALUES/UNITS:** Click on the button to toggle between VALUES and UNITS.

**Financial Year:** Used to specify the financial year to which the data relates. Enter the date of the first day of your Financial year.

**Sales Person:** Used to list the sales person responsible for this account.

**Product:** The product being sold by the above sales person.

**Values Periods 1 to 12:** The values per period (Month), for the next 12 periods. (Budgets and Actuals).

**Units Periods 1 to 12:** The number of units expected to be sold per period (Month), for the next 12 periods. (Budgets and Actuals).

# Client Activities

Click on the Client Activities button to view activity history and to view and edit scheduled activities related to this client.

The 2 areas include:

- [Scheduled Activities](#)
- [Activity History](#)

## Scheduled Activities

This area lists all Scheduled activities that are still due to take place and those overdue activities that have not been completed as yet.

**Staff ID:** The sales person for whom this activity is scheduled.

**Date:** The date for which the activity is scheduled.

**Time:** The time when the activity is scheduled for.

**Mins:** The expected duration of the activity.

**Activity Description:** The description of the activity.

**Comments:** Any comments specific to this activity.

See [Client Activities](#)

# Activity History

This section lists all the activities that have been completed.

**Date:** The date when the activity was completed.

**Time:** The time when the activity took place.

**Mins:** The duration of the activity.

**Activity Description:** A description of the completed activity.

**Comments:** A comment or result of the completed activity.

**Edit:** This button allows you to edit the current activity highlighted in the Scheduled activities section.

**Complete:** This button allows you to mark one of the Scheduled activities as completed.

**New:** This button allows you to Schedule a new activity.

**Uncomplete:** This button allows you to mark one of the completed activities in Activity History as uncomplete. Note this can only be done if the activity falls within the current month.

See [Client Activities](#)



# Client Service Cycles

Click on the Client Service Cycles button on the toolbar to view all Account service cycles set for the client.

Multiple servicing relationships are possible here. A few sales persons can service this client, where each sales person can call on a different contact person if necessary and on a unique calling cycle.

**Sales Person:** The name of the sales person calling the client based on a calling cycle.

**Contact Person:** The name of the contact person the sales person will see on each scheduled call.

**Cycle ID:** The cycle, in days, between each service visit and or telephone call.

**Last Visit:** The date when the last visit was done.

**Next Visit:** The date when the next visit is due, based on the cycle. This is automatically calculated.

**Last Phone:** The date when the last telephone call was done.

**Next Phone:** The date when the next phone call is due, based on the cycle. This is automatically calculated

The Generate Services button on the toolbar generates scheduled calls based on the Next Visit and Next Phone dates.

See [Generate Services](#).

# Client Profiles

Click on the Client Profiles button on the toolbar. This screen is used to record any additional information about the existing client that has not already captured. Any number of Profiles can be set up, and any number of Keywords for each Profile can be set up.

**Profile:** This is used to select a type of profile from a list. This list can be edited by double-clicking on the down arrow next to Profile. Two different types of profiles can be set up

- [Ordinary Profiles - O](#)
- [Contact Profiles - C](#)

**Keyword Description:** This is used to select one keyword from the list of keywords relating to the selected profile in the previous column. If more than one of these keywords are applicable, add a new record by selecting the same profile again and selecting another keyword.

**Contact:** Used to specify who the profile keyword is applicable to for a Contact related profile, such as sports and interests.

See [Additional Data - Multiple Items](#)  
[Profile Category Examples](#)  
[Profile Keyword Examples](#)

Contact Profiles are linked to a particular contact person at a client (usually personal profiles e.g. hobbies and products of interest).

Other profiles are related to the client - usually details which described the company e.g. corporate structure, manufacturing or buying policies.

## Filtered Clients

A customised list of clients can be viewed by clicking on the Filtered Clients button. This feature calls up the client details screen and displays details of all the clients that exist in the selected list. The following window is displayed so that you can select a list created with the Mail List Management feature.

See [Mail List Management](#)

# Generate Servicing Activity

Many of the activities Scheduled to take place are based on calling cycles. These activities must be automatically generated from the Generate Services button on the toolbar. It is recommended that this be run on a regular basis based on your shortest calling cycle. E.g. if your shortest service cycle is every 7 days, run this generate service option weekly.

Generally most generating occurs on a monthly or weekly basis. This creates scheduled service calls based on the Next Telephone activity, Next face-to-face activity, Product Agreement Expiry date and Next Product Re-order date based on any cycles entered in Service Cycles and Product Agreements.

- Regular Service Cycles
- Product Level Prompt
- Batch posting of Activities

## Client Details Toolbar Summary

- Tool Bar 1
- Tool Bar 2

## Client Invoices

Double-click on the Actuals amount for any period to view Invoices for the current Client that have been imported into **Advantage** . This screen lists all invoices in Invoice Number order (Chronologically) and is set at the first invoice for the Actuals month that was double-clicked. This is for viewing purposes only. Please refer to Appendix A for the Import file layouts for importing Invoices.



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# How to Manage Activities

Created by Third Wave Software (Pty) Ltd.  
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## Introduction to Managing Activities

- Viewing Scheduled Activities
- Booking New Activities
- Automatic Activity Generation
- Editing & Changing Activity Details
- Completing Activities (Logging Contact Reports)
- Reporting on Activities

# Introduction to Managing Activities

There are two major objectives of **Advantage** :

- to manage activities.
- and to manage clients.

Clients are managed from the Client Details screen.

There are two activity views in **Advantage** from which activities can be viewed and managed:

- by Sales Person from the Today's Schedule screen.
- by Client From the Client Details "Activities" tool

# Viewing Scheduled Activities

There are two ways to view planned activities:

By Sales Person on the Today's Schedule form

By Client on the Client Details form

From the above two activity views, the following can be done:

- New Activities can be booked
- Existing activities can be modified and
- Call reports for completed activities can be logged. (Activities completed)

The activities that are displayed on the Today's Schedule screen, are activities by sales person for a specific day.

This is the first screen that is displayed when starting **Advantage** . The left side displays all activities scheduled for a specific time. All other activities: telephone, correspondence and non timed face to face activities are displayed on the right hand side. (Timeless Activities)

To view all the activities for a specific client, first locate a specific client in the Client Details form. Click on the **activities** button on the toolbar. This window displays all activities for the client, both Scheduled activities and a history of Completed activities.

# Booking New Activities

New activities can be created by completing any one of the following:

- Click on the New Activity button on the toolbar.
- Select the View Menu, New Activity option.

The New/Edit Activity screen allows the following items to be captured:

Sales Staff ID

Company

Contact

Activity

Activity Date

Activity Time

Priority

Duration

Comment

View/Add Activity Notes

Add New Activity

Cancel

Microsoft Schedule +

**Sales Staff ID:** Select the Sales Person who will perform this activity from the pull down list.  
This defaults to the current person from Today's schedule.  
E.g. John Smith



**Activity Description:** Select the Activity Description to be performed from the pull down list.  
E.g. Confirm Appointment

**Company:** If you already know the company's name, you can type the first 2 or 3 letters first of the company name, and the full name will then be extracted from the list. If you then click on the down arrow, the first company beginning with these letters will be highlighted. You can of course just click on the down arrow and select the company from the pull down list. The name of the company defaults to the company displayed on Client Details form, if you have selected this new activity option from Client Details.

**Contact:** Select the contact person in the company selected above, whom the sales person will contact to perform this activity.  
This will also default to the contact person displayed on Client Details if this form was opened from Client Details.

**Activity Date:** Enter the date for when this activity is scheduled.

E.g. 14/02/95. You can also click on the calendar button to select a date from the calendar. If for example your client requests a meeting next Wednesday - you can select the correct date from your Calendar.

**Time:** Specify the time when the activity is scheduled to take place.

E.g. 14:30. Leave as 0:00 for Timeless activities.

If you wish to check your diary for a suitable time slot then click on the clock button next to the time field to display the selected sales person's diary.

**Priority:** Specify a priority for this activity. Any numbers from 1 to 9 can be used. The default is 2. Define these numbers according to your priority definitions.  
E.g. 1 for Top Priority activities.

1. Top,
2. High,
3. Medium,
4. General,
5. Routine,
6. Low.

This is particularly important for activities with no specific time.

Today's Schedule will display timeless activities in order of priority.

**Duration:** Specify the approximate length of time (in minutes) the activity is expected to continue for, or how long the activity has taken to complete. E.g. 0:30 for 30 minutes.  
Select a time from the pull down list.

**Comment/Result:** Enter or select a general comment or result referring to the scheduled or completed activity. E.g. Remember samples for Demonstration.. The list of commonly used comments/results can be edited by double-clicking on the down arrow. Results replace the previous comment.



## Using the Calendar for Date Selection

The Calendar is designed to accommodate speedy selection of dates. Use the month forward, year forward, month back and year back buttons to display the required month, year or day. To select a date, click on the specific date required and click on the Select Date button.

Click on **Select Date** button to select highlighted date. Today selects the current date again.

The Schedule button displays the sales person's diary.

Using the Diary to Select a Time:

Highlight the time when the activity is scheduled for and click on the **Select Time** button.

The **Today** button displays the current day.

The Calendar button displays the Calendar.

Option Buttons on Activity Form.

Click on this button to cancel any changes made. When doing so, the details of the activity are reset back to their previous settings.

[Click here to view or add notes to this client while you are logging/editing the activity.](#)

**Notes:** Always enter information in the notes area for each completed activity, this is your sales or call report. Client relationship information builds up in this area.

[Click here to add further new activities.](#)

# Interfacing with Microsoft Schedule +

Click [here](#) to schedule the details of the activity in MS Schedule+. This option is only available if you are integrating with MS Schedule+.

Note that the appointment scheduling functions of **Advantage** can be set up to integrate with MS Schedule+. You will need to have Microsoft Windows for WorkGroups, MS Schedule+ and MS Mail installed on your PC to use this function. MS Schedule+ is a diary facility with group scheduling functions i.e. anyone on the network can request appointment bookings in your diary via MS Mail. Available time slots for groups of people can be viewed by superimposing their diaries.

**Advantage** has been designed to integrate with this environment by providing the following functions:

- When booking on appointment you can view a list of other staff members and invite them to attend the appointment. **Advantage** posts an MS Mail message requesting their attendance and makes a temporary booking in their diary until they confirm.
- When an appointment is made in **Advantage** (i.e. an activity with a "time" specified) **Advantage** posts this to the sales staff's Schedule + diary and books the relevant time period.

## Notes on MS Schedule+ Interface

1. Note in order for an appointment to be booked in Schedule+ the date, time, duration and priority are required to be entered.
2. You must specify that integration with Schedule + is required on the System Admin Form in **Advantage** in order for this function to be invoked.

# Automatic Activity Generation

One of the key functions of **Advantage** is the ability to schedule automatic prompts for sales staff. The following functions are provided:

- Regular Service Cycles
- Product Level Prompt
- Batch posting of Activities

**Regular Service Cycles**

A regular service cycle can be defined to prompt visits and/or telephone calls to a specific contact person at a client or prospect. Any number of cycles can be defined for a client with one or more of your sales, service or management representatives servicing the same or different contact people at a client. Use the service cycle button to define regular cycles for customers. The **Generate Servicing Activity** button creates these prompts.



**Product Level Prompts**

Two types of automatic product prompts are available. The product agreement expiry date triggers creation of a Product Service for the sales person. Examples of applications for these dates include: warranty expiry dates, service dates, maintenance contract dates etc. Also the next re-order date and re-order cycle triggers a product service activity. These activities will appear under the sales persons "Today's Schedule" on the scheduled reorder/expiry date. Use the Product Agreements button to schedule product level reminder dates. In order to maintain reorder dates, an import of sales invoices is preferable in order to update the last and next order dates of consumable products.

**Batch Posting of Activities**

**Advantage** can be used to create batches of activities to a selected range of clients. This may be required either to schedule actions to be taken e.g. phone to follow up on promotional literature or to record activities that have been completed e.g. to record that a particular mailing was sent to a group of clients. Use the "Mail merge" button to select a list of clients and post batches of activities.

# Editing or Changing Activity Details

Sometimes it is necessary to change the details of an existing activity. For example, when an activity needs to be postponed. Existing activities can be edited or modified by any one of the following methods:

- From the Today's Schedule screen - double click on the Activity description.
- From the Activities screen - click on the **Edit** button.

## **From Today's Schedule**

The Date,time,priority and duration of the displayed activity can be changed directly by typing the new settings directly over the ones displayed.

"Double click" on the Activity Description to edit any other details.

## **From Client Details Activities**

Click on the Activities button on the toolbar to view all activities related to the current displayed client.

This screen lists all scheduled and completed activities. Select the activity you wish to modify by clicking on the grey area just to the left of the activity, so that the record pointer "points" to the activity you wish to edit. Click on the **Edit** button and the activity details screen then appears allowing you to make any necessary changes.

# Completing Activities Logging Contact Reports

Existing activities can be marked as completed by any of the following steps:

- From the Today's Schedule screen by double clicking on the Completed column.
- From the Client Details Activities screen by clicking on the "Activities" tool.

## **From Today's Schedule**

Double click in the Completed column under the red check mark, above the priority number next to the activity you wish to complete.

## **From Client Details Activities**

Click on the Activities tool on the toolbar to view all activities related to the current displayed client.

This screen lists all scheduled and completed activities.

Select the activity you wish to complete by clicking on the gray area just to the left of the activity, so that the record pointer "points" to the activity you wish to complete.

Click on the **Complete** button and the activity details screen then appears allowing you to make any notes and changes before clicking on the **Complete** button.

Complete Activity Screen.

# Complete Activity Screen

The main details of the activity are displayed at the top of the screen. The cursor moves directly to the time taken field. You can however change the activity details (date, time, contact) if you wish.

Time Taken

Update status

Results

Notes.

Click on the **Complete** button when finished. A message displays after updating your statistics, confirming that the activity has been completed.

**Update Status:** Update the status of the Prospect or Customer if necessary - select a status by clicking on the drop down list.

# Reporting on Activities

To assist in effective activity management it is important to print out management reports on a regular basis. This helps to control your activity levels and allows sales staff to **"self manage"** their activities.

The following reports are recommended:

- Activity Schedule and Cards : Daily and Weekly
- Overdue Activity Report : Weekly
- Completed Activities : Weekly

## Activity Schedule : Daily and Weekly

**Purpose and Benefit:** This report lists all the activities scheduled for a specific sales person for a specified period. The summary page (Schedule) provides the sales person with a list of activities for the selected period so that he/she can plan their diary.

It also provides up to date detailed information about each of the clients being called upon so that he or she can concentrate on providing the client with the applicable service. These are referred to as the Client Cards. The results of the contact or the call report can be written onto the card for later input.

**Frequency:** Weekly and Daily..

After selecting Activity Schedule and Cards from the reports menu, the system prompts you for the period and sales person for whom you would like to print the activities for.

1. Select the Sales Person.
2. Enter the period.
3. Click on Preview or Print.



**Print Preview:** This allows you to view the selected report on screen first before printing on the printer.

**Print on Printer:** This sends the report directly to the printer, without previewing the report on screen.

**Client Cards:** This report displays as much information on a specific client or range of clients as can be retrieved from your database. The amount of information printed on these cards can be set by indicating specific y Report should be printed on a regular basis. At a glance one can see the important activities that have not been completed and can then reschedule and prioritise these overdue activities. This report lists all the overdue activities.

**Frequency:** Weekly.

# Overdue Activity Report

To control any overdue activities an Overdue Activity Report should be printed on a regular basis. At a glance one can see the important activities that have not been completed and can then reschedule and prioritise these overdue activities.

**Purpose and Benefit:** This report lists all the overdue activities.

This is useful to list all activities that should have been completed by the current date, but were not due to one reason or another. Important activities can then be rescheduled for another time.

**Frequency:** Weekly.

## Completed Activities : Weekly

**Purpose and Benefit:** This report lists all completed activities over a specified period with notes logged for each activity. This would be used to show which clients that were visited or called on over a certain period and what the result of each contact was. This can be used to submit to sales management as a summary of a sales person's activity. The detailed report can be edited by sales management for submission to senior management.

**Frequency:** Weekly or on request.

See also [Print](#) and [Preview](#)

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# Mail List Management

Created by Third Wave Software (Pty) Ltd.  
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The Mail List Management features of **Advantage** facilitate the selection of any cross-section of clients from the system through an easy to use point and click selection tool. Lists can then be used for various purposes.

Combination of direct-marketing messages with direct selling is absolutely essential in order to maximise your returns from the **Advantage** database.

**Advantage** develops into your own private market place and direct marketing activities to this marketplace help to develop share of mind (and market share) at the least possible cost.

- Introduction
- Creating Your Own List
- Deleting a List
- Changing/Editing a List
- Exporting Data for Mail Merging purposes
- Printing Labels from a List
- Print Address Lists
- Creating Activities for all Clients on a List

- to print mail-merge letters (Using an External Word Processor)
- to print address labels
- to print out Address lists and other lists
- to schedule activities with all clients on the list
- to manage hit rates and sales values generated from a specific list.



# Introduction to Mail List Management

Click on the Mail-Merge tool on the toolbar to start the Mail List Management function of **Advantage** . This tool facilitates automatic mailing of letters to any selected range of clients, prospects and customers. Mailing lists can be generated using any combination of fields as selection criteria from the client database.

Multiple contact persons at clients can be mailed.

Examples of types of lists that can be generated in **Advantage** are as follows:

- Mailing lists can be generated from profiles. e.g. all customers who play golf.
- Customer mailings can be created using the serviced product details. e.g. all customers with service contracts for product ABC expiring next month.
- Prospect mailing lists can be generated from prospect activity history details. e.g. all prospects who attended demonstrations in the last two months.

The bottom section of the screen is used to view and edit the list entries. Mainly used for viewing purposes and not editing purposes. The Edit button is used to edit the selected list.

# Creating Your Own List

To create a new user-defined list of clients, contacts, prospects or customers, first select the sales person for whom the list will be created from the attached pull down list. E.g. John Smith. You can then either select an available list from the pull down list to work with, or create a new list description by double-clicking on the pull down arrow. To add a new mail list enter the following details of the new list.

1. Sales Staff: Select from the pull down list. This defaults to the ID of the Sales Person selected on the previous screen. E.g. JS (John Smith)
2. List ID: Enter a 3 letter code for this list.  
E.g. DIS for Distributors.
3. Description: Enter the description for the list. E.g. Distributors.
4. Group: (Optional) 3 letter code to group similar types of lists together.

Once a new list description is added or a list is selected, to create the entries for this list, click on the **selections** button. This will display the selection screen so that the criteria for the list can be set up (For New lists), or modified (For existing lists).  
See [Selections Screen](#).

# The Selections Screen

This screen comprises many "**push buttons**" to define selection criteria based on a number of items stored in the database. Each block of buttons contains fields from databases in the system.

There are two types of blocks - those with a normal background  
and those with a coloured background.

**NOTE:** Only one of the blocks with a coloured background can be used in each list. i.e. selection criteria from separate coloured blocks cannot be combined. You need not use any of the coloured blocks at all.

The bottom section of the screen displays your selection as an SQL statement. This statement is then used to create the entries within you mail list.

There are two types of methods used for these push buttons

- Selecting From a List of Choices
- Entering a Specific Range

Related Topics Generate, New, Save

The four coloured blocks are:

- Other Profiles
- Contact Profiles
- Products
- Activities

This means for example, that one cannot select on criteria from both the activities and products blocks.

You can however, use more than one criteria from one block. Thus you can search on product group and probability % from the products block.

The non-coloured blocks can be used together. These are the following blocks:

- Clients
- Contacts
- Cycles

Any number of criteria can be combined from these three blocks.

# Selecting Entries From a List of Choices

## **Buttons which allow selection from a list.**

All data items which use lists of values in **Advantage** will display their list of values and you can point and click on the values you wish to search on. An example of this is the **Areas** button under the **Clients** block. To select by client Area/s click on the Area button. A screen appears listing all the available areas.

To select an area, click on the area description in the left column and click on the right arrow to include this area to the right hand column.

The description(s) in the right column under Selected: are then included in the SQL statement. Click on the OK button to accept the selections. The query screen is then displayed with your SQL statement displayed in the bottom area of your screen.

You can narrow down your selection criteria by clicking on more buttons. Other buttons which allow selection from a list include: Status, Industry, C/P, etc.

Note most of the alpha fields use list selections, whereas the numeric and date type fields use the method of entering a specific range.

## Entering a Specific Range

The second type of selection button is used mainly for numeric and date fields where the available range of options are too great to display in a list. e.g. Probability %, Expected Sales Date, Contract Expiry Date (ExpiryD).

If you click on the Probability **Prob%** under the Clients block or Products block, no list of available entries are displayed, instead an area where text can be entered is displayed.

To select all clients whose Probability is greater than 79% :

1. Type in >79 in the left column.
2. Click on the right arrow to include this criteria in your selection.
3. Click on the OK button to exit.

The **GENERATE** button scans the database and creates the list based on the criteria selected. Note that the Generate process can take some time to run since selections are not always made on indexed fields. Once the process is complete, click on the exit door to return to the Mail List Management form.



The **NEW** button erases the Criteria statement, allowing you to start defining your criteria afresh. Useful in the event of errors.

The **SAVE** button allows you to save the SQL criteria statement as part of the list.

## Deleting a List

Click on this **Delete** button to delete a list. The specific list must be selected first on the Mail List Management form. This will delete the list description and all the entries in the selected list. After clicking on the delete button, a confirmation message will appear.

# Changing/Editing a List

Click on the **Edit** button so that entries can be added, deleted or modified if necessary. The following details are displayed:

**Company Name:** The company and/or contact person can be changed if necessary.

**Contact Name:** The name of the contact person selected for the list. Note that any number of contacts at one client can be entered into a mail list.

## **Managing Promotions through Lists**

The next three fields can be used to control success rates where a list is used for a promotion. e.g. to sell a new product/service or to invite clients to a function. The List Management Reports monitor success rates by sales person and type of list.

**Converted (Y/N?):** Type in Y or N to indicate whether the list entry was converted to a sale or not.

**Date Converted:** If the entry was converted, the date when conversion took place.

**Sale Value:** If the entry was converted, the value of the sale if necessary.

These three fields/columns can be updated from this screen or from the bottom half of the Mail List Management screen itself, where the records are displayed.

# Exporting data for Mail Merging purposes

Click on the **Export** button to generate a file containing Names, Addresses, Contact details and telephone numbers for merging with standard form letters created with an external word processor. This facility is useful for targeted mail shots and mass mailings.

An existing list must be selected first before clicking on the Export button. Two Layouts are available: Select the required layout, depending on your Word Processor:

- Comma Separated for standard ASCII Text files and All other Word Processors.
- Word Merge Format for use with MS Word.

After selecting the required layout, click on the **Create Merge File** button. Note that the file created will be called "**merge.txt**" in your current directory.

## "merge.txt"

### Layout

Mail List ID, Company Name, Division, Contact, Designation, Postal Address 1, Postal Address 2, Postal Address 3, Postcode, Salutation, Telephone, Fax, Other, Language, Customer/Prospect, Account Number, Converted Y/N, Date Converted, Sales Value

Example of "merge.txt" (6 Records)

"ctv","ABC PUBLISHING",,"Mr Raymond de Villiers","Managing Director","66 Short Street","BRAAMFONTEIN",,"2197","Mr R de Villiers","4071131","4031055","4071788","E","P","098 567 847",,0

"ctv","AUTOMOBILE SERVICES",,"Mr Jack Becker","Managing Director","66 Short Street","BRAAMFONTEIN",,"2197","Mr MJ Becker","4071131","4031055","4071788","E","C","098 567 847",,0

"ctv","BALMORAL INSURANCE",,"Mr Steven Hadden","Business Consultant","PO BOX 6767","FIELDING",,"3121","Mr SD Hadden","082 888 6591","764-1872","Page: 909-5000 Code SH21","E","C","BAL1234",,0

"ctv","INTERSHOP",,"Mr W Jardine","I R Manager",,"PO Box 714",,"CAPE TOWN",,"8000",,"Mr W Jardine","021 403-7911",,"021-403-7537",,"E","C","1234",,0

"ctv","JPT Caterers",,"",,"",,"P",,0

"ctv","ZITON SA (PTY) LTD",,"Mr Graham Vickery","Financial Manager",,"P O BOX 4965",,"CAPE TOWN",,"8000",,"Mr G Vickery","(021) 462-4020",,"(021) 462-4629",,"E","C",,0

### **"merge.txt"**

This layout is used with MS Word 6.0 and up.

Select the Mail Merge option from the Tools menu in word and select the Get Data option to open the data source as E.g. C:..TXT

#### Layout

"List_ID"	"Company_Name"	"Division"	"Contact"	"Designation"	"Postal_Addr
ess_1"	"Postal_Address_2"	"Postal_Address_3"	"Post_Code"	"Salutation"	"Tel_
No"	"Fax_No"	"Other_Tel_No"	"Language"	"C_P"	"Account_Code"
"Converted_Y	"Value_Of_Sale"				

# Printing Labels from a List

Click on the **Labels** button to print out address labels of all the entries on your mail list.

**Label Format:** Select the format of labels that you would require to print on.

- 3 across 70mm x 36mm refers to single cut sheet A4 size labels with 24 labels per sheet. (This size is available for both Dot matrix printers and Laser printers.)
- 2 across 95mm x 36mm usually refers to continuous sheets of labels for Dot Matrix printers.

Click on the appropriate size of labels you are printing on. Check the label size first.

Select the layout required.

**Layout:** - **Company or Contact Name First**

If you wish the company name to appear before the contact person select "**Company Name First**" and select "**Contact Name First**" to print the contact person before the company.

**Print Preview** Click here to view the labels on screen before you print. You can check for missing addresses or postal codes. The labels can be printed from the preview screen as well.

**Print Labels** Click here to print out the labels directly to the printer, without previewing them. These labels print on your default printer setting.

**TIP:** Print a sample of your labels on blank paper first to check the size of them so that you can match them to the blank label sheets. If they do not fit exactly then adjust the size of each label as follows:

- Click on Preview Labels.
- Select the File menu and Print Setup option.
- Click on the "More>>>" button.
- Adjust the row spacing if the labels "move" up after each row, also check the item size (width and height) to make changes if necessary.



## Print Address Lists

Click on the **Address** button to print an address list of all the entries on your selected mail list.

# Creating Activities for all Clients on a Selected List

Use this option to record completed or scheduled activities against all clients on a selected list. e.g. that a letter was sent on a specific date or to schedule a future activity e.g. Telephone follow-up call on a mailing sent. These activities will display on the Today's Schedule screen on the date scheduled.

**Salesman:** Select the salesman who the activities will be logged under.

**Activity:** Select the description of the activity to be created for all the clients on the mail list.

**Activity Date:** Type in the date for which the activity is to be scheduled.

**Priority:** Type in a priority (1-9) for the activity.

**Comment:** Enter or select an applicable comment if necessary.

**Complete/Incomplete:** Indicate whether the activities should be created as completed or incomplete (not done) activities. If you create completed activities you are simply creating activity history so as to record against each client that a mailing was sent. If you schedule an uncompleted activity you are asking sales staff to do some action on each client on the list. e.g. to follow up on an invitation mailed to the client.

Click on the **Create Activities** button to begin the creation process and exit this screen with the exit door.

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# Advantage Reports

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An overview of the Reports available from **Advantage** .

## Introduction to the Reports in **Advantage**

Agreement Expiry Report

Customer Servicing Activity Analysis

Customer Budget Vs Actuals - Graphs

Customer Budget Vs Actuals Graph

Budget Vs Actuals By Branch

Budget Vs Actuals By Sman

Sales Report By Branch

Sales Report By Sman

Prospect Status Report

Pilot Gauge Graphs

Multiple Products Forecast Report

Prospect Forecast Report

Activity Schedule

Scheduled Activity And Client Cards

Ad Hoc Client Cards

Client Cards By Mail List

Completed Activities

Overdue Activity Report

Client Address List

Client Address List By Service Cycle

Market Analysis Report

List Management Report

List Management - Summary

Profiles Report

Areas Report

# Introduction to the Reports in **Advantage**

Click on the Reports button to view the reports menu. The reports are categorised as either customer, prospect or general reports.

The customer reports only print customer type clients, prospect reports print only prospects and general reports include both types of clients (some of the general reports have an option allowing the operator to select customers, prospects or both e.g. the Client Address Report). To Select a report, click on the radio button to the left of the report. After selecting the report required, click on this Print Preview button to view the report on screen. You can print a report from this Preview screen. To print the report directly without viewing the report, click on the Print button.

## **Report Options**

Each report has some options that are required to print the report - these are different for each report. They are designed both to implement security and to make the reports more flexible. For example, all reports ask which Branch should be printed, some reports allow selection of one or all sales staff. Other options may include selecting a period for which the report is required or different report formats such as with or without notes or sorting in different orders.

**Select Branch to Print** You can select "All Branches" by entering an asterisk (\*) into this option - the default is all branches. This option implements a level of security by preventing staff with User rights from printing all branches.

**Select Sales Staff to Print** Use this option to select one or all sales staff data to be printed - You can select "All Staff" by entering an asterisk (\*) into this option - the default is all sales staff. This option is also used to implement access control and staff who have only User rights can only print their own information - i.e. they cannot print all sales staff. This option implements a level of security by preventing staff with User rights from printing all sales staff.

# Agreement Expiry Report

**AUDIENCE** Customer Service Manager

**PURPOSE** This report uses the period "To" which each customer product agreement is valid. All agreements due to expire within the selected period will be listed on the report. The report may be sorted by customer or by salesman and then customer. The following is printed on this report: product code and description, product group, Agreement number, product contact name, telephone number and department, price, volume, period of validity.

**OPTIONS** Print From and To Date - All agreements which expire in this selected date range will be printed.

**BENEFITS** Use this report to print a list of all contracts which are due to expire. If product servicing is being used this report can be printed in advance before service cards are generated to check activity levels required. It may also be printed as an alternative to printing a complete service card.



# Customer Servicing Activity Analysis

**AUDIENCE** Customer Servicing Staff and Manager

**PURPOSE** This is a control report which details on one graph per sales person the targeted and actual servicing activity for the month. The report can also include details of clients and activities with totals printed by salesman and within salesman by customer type.

**OPTIONS** Select Sales Person to Print - Enter an asterisk(\*) to print all sales staff or select all sales staff. Enter Period From and To - this activity report can be printed for any selected period.

**BENEFITS** The customer service manager can view at a glance (on one graph) the status of each salesman's servicing activity. Useful for sales management and sales staff to monitor activity levels. Generates a sense of achievement as targets are achieved. Can be viewed very quickly at month end by a supervisor for a detailed review of the status of activity.

# Customer Budget Vs Actuals - Graphs

**AUDIENCE** Sales Staff and Sales Management

**PURPOSE** These report displays graphically the actual sales values compared to budget values per financial year, by Sales Person and Product. There are two Budget V's Actuals Graph Reports - the first report **Customer Budget V's Actuals - Graphs** displays graphs for all Customers in your system. The second report **Customer Budget V's Actuals Graph** displays the graphs for a selected customer only.

# Budget Vs Actuals By Branch Salesman Customer

**AUDIENCE** Sales Staff, Sales & Marketing Management

**PURPOSE** Financial data is usually imported to the system from the invoicing and financial systems. This report facilitates detailed analysis of budgeted and actual figures per client. The report is sorted and totaled by sales person and within sales person by client and can be printed with either rand amounts or unit sales. You may also elect to print this report for one specific client only.

OPTIONS ...

**BENEFITS** Some financial systems already perform these type of analyses. The main function of the financial data being imported to **Advantage** is to be able to produce client figures on call cards so the sales staff have it at their fingertips on each client contact. However, these reports are also useful since they offer many other benefits

**Select Branch to Print** - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

**Select Financial Year Start Date** - this indicates which financial year to analyse as the system can store many years data.

**Select All or a Specific Sales Person** - the report can be printed for one sales person only or for all sales staff. The report sorts and totals by sales person and within sales person alphabetically by client company.**Rand Values or Units** - the report can print either rand sale values or unit sales.

**Print for All or a Specific Client** - the report may be printed for all clients or you may select a specific customer to print from the pull down list.

- Easier access for sales staff and sales and marketing management to their client data.
- Some financial systems may be lacking some basic analyses e.g. by sales person. Graphical analyses may not be available.
- It opens up possibilities for more complex analysis than may be available on financial systems by combining other marketing criteria with the financial data. E.g. analysing sales by industry, by type of client, by geographical area etc. this would be done by accessing the financial and other data in **Advantage** from a spreadsheet type tool.

# Budget Vs Actuals By Salesman Customer Product

**AUDIENCE** Sales Staff, Sales & Marketing Management

**PURPOSE** Financial data is usually imported to the system from the invoicing and financial systems. This report is similar to the Budget V's Actual analysis above except that it also breaks client sales down by product. This report facilitates detailed analysis of budgeted and actual figures for the whole year per client and per product per client.

The report is sorted and totaled by sales person and within sales person by client and within client by product. The report can be printed with either rand amounts or unit sales. You may also elect to print this report for one specific client only or for a specific product or product group across all clients or one client.

OPTIONS ...

**BENEFITS** Some financial systems already perform these type of analyses. The main function of the financial data being imported to **Advantage** is to be able to produce client figures on call cards so the sales staff have it at their fingertips on each client contact. However, these reports are also useful since it offers other benefits

**Select Branch to Print** - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

Select Financial Year Start Date - this indicates which financial year to analyse as the system can store many years data.

Select All or a Specific Sales Person - the report can be printed for one sales person only or for all sales staff. The report sorts and totals by sales person and within sales person sorts alphabetically by client company. Total for each product sold to each client are also calculated.

Select All or a Specific Product Group - the report can be printed for one product group only or for all product groups. The default is all product groups.

Rand Values or Units - the report can print either rand sale values or unit sales.

Print for All or a Specific Client - the report may be printed for all clients or you may select a specific customer to print from the pull down list.

Print for All or a Specific Product - the report may be printed for all products or you may select a specific product to print from the pull down list.

# Sales Report By Branch Salesman Customer

This report is similar to the Budgets and Actuals By Branch, Sman, Customer Report above but it prints only sales and not budgets.



# Sales Report By Salesman Customer Product

This report is similar to the Budgets and Actuals By Sman, Customer, Product Report above but it prints only sales and not budgets.

# Prospect Status Report

**AUDIENCE** Sales Manager and Salesman

**PURPOSE** The salesman can use this report to review his prospect base in order of importance. The prospects closer to the sold status would probably be given higher priority than those at an earlier stage.

- The salesman can use this report to review the numbers of prospects he has at each status to ensure a continued regular flow of sales. He can locate problems such as too few new prospects or too few prospects being closed.

- The sales manager can use this report at sales meetings to review the status of specific prospects.

OPTIONS ...

**BENEFITS** The salesman uses this report as a control to monitor the overall status of his prospect base. He can see at a glance if he has a deficiency in any area. Neglected prospects and high priority prospects can be identified. The sales manager can use this report to monitor at a glance the status of the prospect base of each salesman.

**Select Branch to Print** - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

Select All or a Specific Sales Person - the report can be printed for one sales person only or for all sales staff. The report sorts and totals by sales person and within sales person sorts alphabetically by client company. Select With or Without Product Description - the report can be printed with only the product ID or with both the ID and product description. An additional line is printed for each prospect if the product description is printed.

Include or Exclude Notes - the report may be printed with all the prospect sales notes under each prospect or with just prospect information and no notes.

Include Contact and Telephone Number - sales staff may print this with contact details providing the report is stored securely so it does not fall into competitor hands.

# Pilot Gauge Graphs

**AUDIENCE** Sales Management and Sales Staff.

**PURPOSE** This report provides an objective analysis of the salesman's effectivity, not only in terms of sales made, but in terms of the important stages of the sales cycle. The effectivity of salesmen can thus be seen in converting of leads to prospects, in converting prospects from one status of the Sales cycle to the next status e.g. Quotation to Sale.

Provides short term operational control over the sales team. The report depicts graphically each salesman's actual activity (over a month) on a weekly basis. Activity is monitored by prospect statuses completed as well as numbers of each activity type completed. Actual activity for the month is compared to target activity.

**BENEFITS** This enables both the salesman and sales manager to pinpoint any areas of weakness. A low conversion rate at any stage of the sales cycle (by comparison to other salesmen and the company average) would indicate a potential for improvement. If performance is monitored in this way, problems can be addressed before they seriously affect sales results. The calculation of company norms or average ratios for the salesforce have the **Advantage** of providing a basis of comparison. All salesforce members would attempt to have better than average results. This is a self driving motivating force i.e. as salesmen strive to improve their results so the company averages improve. Measures, monitors and controls salesforce performance at the activity level. Management receives early warning of problems in the sales process. The problem can be established at the activity level. For example, a poor variance on status S would indicate a closing problem whereas a poor variance on status E would indicate a prospecting problem.

# Multiple Products Forecast Report

**AUDIENCE** Sales Staff

**PURPOSE** This report analyses all potential products for prospects entered into the client products area. The report can be printed by sales person, or by product. The Prospect Forecast Report does not analyse the individual products making up a sale. Where several items are quoted on this report does a forecast across all products.

**OPTIONS** Enter Forecast Start Date - Enter here from which date you wish to begin the forecast. This report uses the Expected Sale Date on each prospect to calculate the forecast.

Print Forecast by Salesman OR By Prospect OR By Product - this report can sort and total either by sales person or By Prospect or By Product. When selecting sort by product, the report can be totaled at the product or product group level.

**BENEFITS** Facilitates viewing of potential sales across all product lines. This is particularly useful if distributing products from different suppliers and reporting is thus required by product or by product group.

# Prospect Forecast Report

**AUDIENCE** Sales Management

**PURPOSE** Uses the expected sale dates entered by the sales staff to produce a 3 monthly sales forecast for potential sales with prospects. Only prospects who have an expected sale date are printed on the report. Two additional columns are also included to print any sales due before or after the selected 3 month period. The product used on this forecast report is the Product of Interest on the Client Details form - not the products list from the client products form (See the Multiple Products Forecast Report for those).

**OPTIONS** Enter Forecast Start Date - Enter here from which date you wish to begin the forecast. This report uses the Expected Sale Date on each prospect to calculate the forecast. Print Forecast by Salesman OR By Product - this report can sort and total either by sales person or By Product. When selecting sort by product, the report can be totaled at the product or product group level.

**BENEFITS** Provides management with some idea of the forthcoming sales detailing the timing, size (in value) and probability of each potential sale. Allows senior management from month to month to monitor the flow of potential sales without going down to the detail of individual prospects.

# Activity Schedule

**AUDIENCE** All Users

**PURPOSE** This report prints a week-by-week summary of all scheduled activities daily or for a specific period by sales person. Use this report should you wish to view your future activity.

**OPTIONS** Select Sales Person - Enter here the sales person for whom the report is required. Enter an asterisk (\*) to print for all sales staff. The default is all sales staff. Select the Period for the Activity Schedule - an activity schedule can be printed for any period. Enter the From and To date for which the schedule is required. The default dates are for today's schedule.

# Scheduled Activity And Client Cards

**AUDIENCE** Sales or Service Staff

**PURPOSE** This report is printed for sales staff prior to making client contacts (visits or telephone calls). The frequency of the report depends on how often they are at the office. Usually it is printed daily or weekly in advance. This report is the driving mechanism of the system if sales staff do not have direct access to the software. It includes a schedule of all calls (sorted by area) for the selected period plus a client card for each activity on the schedule. The cards are also a call reporting mechanism the call report is recorded on the card by the sales staff on completion of the client contact. The call report can then later be captured by a system operator or by the sales person directly if possible.

These cards print various Sections. These can be set with the More Options Button >>

**OPTIONS** Select Sales Person - Enter here the sales person for whom the report is required. Enter an asterisk (\*) to print for all sales staff. The default is all sales staff.

Select the Period for the Activities - an activity schedule and client cards can be printed for any period. Enter the From and To date for which the report is required. The default dates are for today's schedule.

**Preview Summary** - Select this button to preview the activity summary only.

**Preview Cards** - Select this button to preview the cards only.

**Print Summary** - Select this button to print the Activity Summary only.

**Print** - Select this button to print both the Activity summary and the supporting cards.

**BENEFITS** This a reporting mechanism both for driving sales activity and for reporting contact report details to the system. The card is invaluable since it is not usually possible for a sales person to access his computer on sales appointments. The card ensures he has all client details at his fingertips. He can thus make informed sales calls and can control the sales process through superior knowledge of his clients and their requirements. The cards have the added benefit of projecting a professional image on client calls.



# Ad Hoc Client Cards

**AUDIENCE** Sales or Service Staff

**PURPOSE** These cards are similar to the scheduled cards printed for services due. However this report can be used to print a service card at any time for any Client or range of Clients. Another option to print an Ad Hoc Client Card with notes (Call reports) only is also available.

The cards are also a call reporting mechanism. The cards print complete details on each client including sales history, serviced products, call history, notes, customer budgets versus actual sales, profiling details, static details, contact names, designations, addresses etc.

These cards print various Sections. These can be set with the More Options Button >>

## **BENEFITS**

This document intends to maximise effectiveness of the salesman's selling time. It places all client details, activity history and notes at his finger tips enabling him to operate in an informed, professional manner. The report can double as a data capture form to record both the results of the current contact and then the next contact/activity or telephone follow up to be done. This information can then be entered into the system either by a system administrator or by the salesman himself.

# Client Card Sections

The cards can print complete details on each client including sales history, serviced products, call history, notes, customer budgets versus actual sales, profiling details, static details, contact names, designations and addresses, etc. If required you can select which sections should print on the cards and in some cases also a date range for printing data e.g. notes.

These can be set with the [More Options Button >>](#)

The following sections print on the card:

## **Appointment/Activity Scheduled and History**

Date, time, contact person, designation and appointment/activity description.

## **Static Details**

Source, main product of interest, area - to facilitate route planning, address, telephone number secretary, user defined fields etc.

## **Other Contacts and Contact Profiles**

All contact people entered will be printed with their profiles. There may be more than one profile section e.g. Hobbies and Interests, Entertainment and Gifts, Educational Details and Anniversaries.

## **Profiles**

All profiles are listed here - there could be numerous sections here e.g. : Group Affiliations, Manufacturing Details, Company Policies etc.

## **Client Notes**

All previous notes will be printed by date order.

## **Activity History To Date**

Details, dates and comments/results of all contacts of completed activities.

## **Budgets & Actuals**

Prints month by month budgets and actual sales for each product in either Rands or Units.

# Client Cards By Mail List

**AUDIENCE** All Staff

**PURPOSE** These cards are the same as the cards printed for Scheduled cards and Ad Hoc cards above. However this option allows for printing of client cards for a specific range of clients i.e. for all clients on a selected mail list. This accommodates total flexibility in the selection of clients for printing cards since the selection process for the list is done through the Mailing options.

**OPTIONS** Select a Mail List to Print Cards For - a pull down list displays all mail lists defined in the system. Select the list for which client cards are required. Use the mailing button on the toolbar to define a new list. See also [More Options Button >>](#)

**BENEFITS** Facilitates printing of a batch of client cards for a specific purpose. For example, a special offer may have been mailed to a few clients. Client cards for each client mailed may be required in order to follow up on the promotion.

**MORE OPTIONS BUTTON>>>** - this button opens a form allowing the user to set the print options for client cards. Most of the sections on the cards are optional and some can also be printed for a specific period e.g. sales notes.

Note your selections are stored by the system and will remain the same until changed. The same options are used for printing all client cards i.e. Ad Hoc, Scheduled and By Mail List.

# Completed Activities

**AUDIENCE** Sales Manager/Salesman

**PURPOSE** This report summarises a salesman's activity and activity type for a specified period. It is useful for printing a summary of all the call reports for all people contacted by a salesman in a specific period e.g. last week. The sales manager can scan the weekly reports for important information that he may wish to report to senior management. The sales manager can edit the report using a word-processor and e-mail the summarised version to his management.

Totals are accumulated for the three activity types: Face-to-Face, Telephone and Correspondence and within each activity type for each specific type of activity. Thus within face to face activities you may have demonstrations of your various products totals will print for each type of demonstration and then for face to face activities as a whole.

Several options are available for this report i.e. print for customers, prospects or both; print the report with or without sales notes; print for any period; print for a specific branch.

## OPTIONS ...

**BENEFITS** This report can be used to print a summary of all calls made and the notes logged for the last period. This can be scanned for important information for reporting to higher levels of management. The report facilitates activity summaries for any period e.g. last week, last month etc.

**Select Branch to Print** - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

Date To Print From: To: - Enter here the date range for which completed activities are to be printed.

Print for Prospects, Customers, Both - This report can be printed for prospects only, customers only or both types of client. The default is both client types.

Print Report With or Without Notes - This report prints details of each activity completed and can optionally also include the notes logged when the activity was completed. The default is to include the notes.

# Overdue Activity Report

**AUDIENCE** Sales Manager/Sales Person

**PURPOSE** This report prints details of all incomplete activities for each sales person at the current date. The due date, client company, contact person, activity type and remarks are printed for each overdue activity.

**OPTIONS** Select Sales Person - Enter here the sales person for whom the report is required. Enter an asterisk (\*) to print for all sales staff. The default is all sales staff.  
Print All Overdue Activities or Select Date Range - This report can either include all overdue activities or only those since a certain date. If this report is printed regularly then it may not be necessary to reprint long overdue activities.

**BENEFITS** This report can be used as a regular control facility by the salesman to highlight any omitted activity or to locate activities which were completed but not recorded in the system. The sales manager can use this as an exception report to control any activity which is overdue for example by more than a week.

# Client Address List

## **AUDIENCE** All

**PURPOSE** Prints a telephone and address list of prospects, customers or both. There are two formats of this report - either the standard format which prints 10 clients per page or a condensed format which prints 20 clients per page.

### **Quick Condensed Format**

This format does not have any print options it prints as follows: prospects and customers separately; includes only the main contact person; prints across all branches; compresses all data into two lines per client and thus prints 20 clients per page.

### **Standard Format**

This format has several different print options and is in a more readable layout - 5 lines per client and only 10 clients per page. The following options are available: the report can be printed for prospects, customers or both client types; one or all contacts can be printed; the list can be printed by sales person or for the whole branch. The client number, area and salesman of each client is also printed.

### OPTIONS ...

### **BENEFITS**

It is useful for sales staff and other areas of your business to have access to an up-to-date customer address list and since this system is updated daily by sales staff it is likely to be the most current database available.



Quick Condensed Format: Select this option to print a condensed client list.

Standard Format: Use this format if you prefer a more readable format. This format has the following options:

Select Branch to Print - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

Print By Sales Person or Across Branch - the address list can be sorted by sales person and then alphabetically by client company within each sales person or it can be only sorted alphabetically by client company across all clients in the branch.

Print Only Main Contact or All Contacts - the address list can include only the main contact for each client (i.e. the contact displayed on the Client Details Form) or all contact people at each client.

Print for Prospects, Customers, Both - This report can be printed for prospects only, customers only or both types of client. The default is both client types.

# Client Address List By Service Cycle

**AUDIENCE** Sales Staff

**PURPOSE** Sales staff generally do not need the complete client or prospect list. If clients can be serviced by more than one sales person however, then this address list would be required. Prints for sales staff an address list of all the clients they service (i.e. for whom they have a service cycle defined). The report prints the contact person they service only.

**OPTIONS** Select Branch to Print - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

Print By Sales Person or Across Branch - the address list can be sorted by sales person and then alphabetically by client company within each sales person or it can be sorted alphabetically by client company across all clients. A client may appear more than once - once for each service cycle.  
Print for Prospects, Customers, Both - This report can be printed for prospects only, customers only or both types of client. The default is both client types. Note only prospects and customers who have service cycles will be printed - usually prospects do not have service cycles.

# Market Analysis Report

**AUDIENCE** Marketing and Sales Management

**PURPOSE** These analyses can be used to compute own and competitor market share. In order to calculate these shares accurately, own and competitor sales values should be recorded. Product sales should be recorded for own customers and also for clients where you do not currently make any sales - all market information discovered by sales staff should be recorded here. Each price recorded by sales staff is automatically dated with the input date and these reports allow users to select by input date, which date range of information is included.

OPTIONS ...

**BENEFITS** If on-going business with customers is your core business and you operate in a competitive market, then these analyses are very useful. In order for these reports to be effective, sales staff need to enquire about all product purchases by each client on every sales call. Usually this can be achieved by reviewing the existing details on the clients card - customers are usually not too difficult about supplying the information if they see that it is recorded and used.

# Market Analysis Report Options

**Select Branch to Print** - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches.

**Calculate Market Value For (Months)** - The report calculates the market value of sales of own and competitor products. This value can be projected for as many months as required. The default is 6 months but you may enter the number of months for which this is to be calculated.

**Select Last Price Update Date Range (From and To)** - The system records the date when client pricing is updated. You can specify how recent the data should be in order to be included in the market analysis. Thus aged price information will be excluded. This data should be updated as regularly as possible in order to make this information as accurate as possible. Depending on how volatile prices are in your market place you would enter a suitable date range here.

**Print By Customer, By Competitor or By Product** - There are three Market Analysis Reports available these are:

- By Customer, Competitor and Product - Analyses the value sold by each competitor (and own business) to each account.
- By Competitor, Product Group, Product - Looks at the total market share of both own business and each competitor. Each competitors market share is further broken down into product group and product totals.
- By Product, Competitor - Analyses each product line calculating own and each competitors share of market for each product.

# List Management Report

**AUDIENCE** Sales Staff/Sales Manager.

**PURPOSE** This report prints out all list entries detailing which clients were contacted and of those contacted, how many were converted and any resulting sale value.

**OPTIONS** Enter Period Start and End Dates - Select the period for which lists are to be analysed. Select List to Print - use this option to print an analysis of one specific list only. Use the pull down list box to select a list name.

**BENEFITS** This report facilitates analysis of success rates from lists generated for promotional purposes. Lists can be used simply to monitor invites to marketing functions or for telesales campaigns. The date range option facilitates analysis of all work performed by a sales person for a specific period. The report analyses the percentage contacted and of those contacted the percentage hit rate and order value.

# List Management - Summary

**AUDIENCE** Sales and Marketing Management

**PURPOSE** This report summarises the results of a group of lists. A date range is requested for selecting the range of lists to be analysed - this is the date the lists were created. Lists can be analysed by sales person or for by list category e.g. one could analyse all new product launch lists. The report details the percentage contacted and the percentage hit rate and sale value of each list. One line is printed per list.

**OPTIONS** Enter Period Start and End Date - this defines the range of lists to be analysed using the date the lists were created.

Print Report By Sales Person OR for a specific List Category - by sales person sorts and totals by sales person. By list category allows selection of the category of lists to be analysed.

**BENEFITS** Facilitates comparison of effectivity of each sales person in generating sales from different sales promotions. Also analyses effectivity statistics of different type of promotions.

# Profiles Report

**AUDIENCE** Salesman/Sales Manager

**PURPOSE** This report prints out all the profile information that has been entered. Profile notes may also be printed on this report.

**OPTIONS** Select Branch to Print - This report may be printed for one or all branches - enter an asterisk (\*) to print all branches. The default is All Branches  
Print Report By Profile ID OR By Client OR By Profile Type - by Profile ID sorts by Profile ID. By Client lists all profiles for each client; By Profile Type means other and Contact Profiles separately.  
Print Report for All Profile Ids or Select a Specific ID - allows selection of a particular Profile ID.  
Print Report for All Sales Staff or Select a Sales Person - allows selection of all or a particular Sales person.

**BENEFITS** This report allows you to view the selected profile information - e.g. all the people who play golf.

# Areas Report

**AUDIENCE** All Users

**PURPOSE** This report prints out the geographical areas defined in the system.



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# Integrating **Advantage** with Other Applications

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This section includes specifications for the ASCII file formats required for importing data into **Advantage**. Three types of data may be imported into the system - customers as a once-off import to populate the system and products and sales invoices on a regular basis.

In sales environments where sales staff perform a customer service function and clients buy products on a regular basis then it is of enormous benefit to import details of all sales to clients into **Advantage**. This means sales staff will have client's purchasing details ( 12 months figures by product) as well as all other client data when making sales calls - they do not have to source financial data from other reports i.e. the data is delivered into the hands of the sales staff at the right times.

- [Import Customers](#)
- [Import Products](#)
- [Import Invoices](#)

# Import of Customers

Customers can be imported on a once-off basis to populate a new database. This data can usually be extracted from your financial systems (your current debtors). Thereafter the data is maintained separately in **Advantage** as contact person information usually differs from the contacts in debtors.

NB ! the customer number field should contain the client's debtors account number if you wish to also import sales information from your financial systems.

The following is a file specification for the ASCII data file required in order to import customer details to **Advantage** .

The file to be imported must be an ASCII file in comma separated, delimited format i.e. each field separated by a comma and text fields enclosed in quotes. Each Customer is ended by a carriage return and line feed (i.e. each record starts on a new line). A = alphanumeric field, N = numeric field, "." = decimal point, D = Date field in format DD/MM/YY.

See [File Layout](#) for Importing Customers.

# Layout for Importing of Customers

Field Name	Field Type	
Customer Number	A15	
Company Name	A40	
Surname		A20
First Name	A20	
Initials	A10	
Title		A6
Designation	A25	
Function Code	A3	
Tel Number	A25	
Fax Number	A25	
Other Tel Number	A25	
Secretary	A20	
Postal Address 1	A25	
Postal Address 2		A25
Postal Address 3	A25	
Postal Post Code	A10	
Physical Address 1	A30	
Physical Address 2	A30	
Physical Address 3	A30	
Physical Post Code		A10
Salesman Id Code	A6	
Date A/c Opened	D	
Language Code	A1	
Area Code (Geographical)	A6	
Custom Field 1	N9	
Custom Field 2		N9.2
Custom Field 3	D	
Custom Field 4		A6
Custom Field 5	A10	
Custom Field 6	A20	

# Import of Products

The product file records details about products and is used by the client invoice details, serviced products and budget and actual figures for clients. This information should be downloaded on a regular basis at the same time as invoices are imported. Thus if new products have been invoiced these will exist in the system before the invoices are imported.

The file to be imported must be an ASCII file in comma separated, delimited format i.e. each field separated by a comma and text fields enclosed in quotes. Each product is ended by a carriage return and line feed (i.e. each record starts on a new line). A = alphanumeric field, N = numeric field, "." = decimal point.

<b>Field Name</b>	<b>Field Type</b>
Product ID	A16
Product Description	A30
Product Group	A4
Product Selling Price	N6.2

A sample record from the above file would look as follows:

"SURF123","Surflex Series 8900 Widget", "SFS", 9910.50

# Import of Invoices

Sales information can be imported as regularly as required. It is essential that a backup be performed before running this import as the data could duplicate if the same data is imported twice. The system also automatically updates the clients monthly actual rand and unit sales for each product as the invoices are imported.

The imported file must be an ASCII file. Each field is separated by a comma and text fields enclosed in quotes. Each record must be ended by a carriage return and line feed (i.e. each record starts on a new line). A = alphanumeric field, N = numeric field, "." = decimal point, D - Date field in format DD/MM/YY.

The following describes the layout of the import file.

Field Name	Field Size
Invoice Date	D
Invoice Number	N9
Customer Number	A15
Salesman Id	A6
Product Code	A16
Quantity (Units)	-N6.3
Unit Price	N7.2
Trade Discount Amount	-N6.2



# Advantage Toolbars

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The following 3 toolbars are available:

- Today's Schedule Toolbar
- Customer Tools Toolbar
- General Functions Toolbar



# Today's Schedule Toolbar

Use the Toolbar displayed along the top of the Today's Schedule to access other functions of the system. The toolbar consists of a number of buttons that perform the following actions:



- |    |                         |   |
|----|-------------------------|---|
| 1  | - All Clients           | - View all the Clients in the database.   |
| 2  | - All Clients in Branch | - View all the Clients for the Branch the Sales Person as selected under "Schedule for" is a member of.                   |
| 3  | - See My Clients under  | - View only the current Sales Person's clients as indicated "Schedule for".   |
| 4  | - Serviced Clients      | - View the Clients who are serviced by the current Sales Person.  |
| 5  | - Filtered Clients      | - View all Clients based on a selected Mail List. i.e. use the mail list to filter a specific section of the client base. |
| 6  | - Add New Client/s      | - Create a new Client.  |
| 7  | - New Activity          | - Create a new Activity.  |
| 8  | - Reports               | - Print Reports.  |
| 9  | - Mail-Merge            | - Mail Management facility for generating lists & printing letters & labels.  |
| 10 | - System Administration | - System Administration form.   |
| 11 | - Import Data           | - Import data into <b>Advantage</b> . (Includes Clients, Products and Invoices)   |

# Customer Tools Toolbar

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20  
21 22



- |    |                                  |   |
|----|----------------------------------|---|
| 1  | - All Clients                    | - View all the Clients in the database.   |
| 2  | - All Clients in Branch          | - View all the Clients for the Branch the Sales Person as selected under "Schedule for" is a member of.                   |
| 3  | - See My Clients under           | - View only the current Sales Person's clients as indicated "Schedule for".   |
| 4  | - Serviced Clients               | - View the Clients who are serviced by the current Sales Person.  |
| 5  | - Filtered Clients               | - View all Clients based on a selected Mail List. i.e. use the mail list to filter a specific section of the client base. |
| 6  | - Add New Client/s               | - Create a new Client.  |
| 7  | - New Activity                   | - Create a new Activity.  |
| 8  | - Create Prospect from Customer. | - copy an existing client into a new prospect.  |
| 9  | - Mail-Merge.                    | - Mailing merge facility.   |
| 10 | - Autodialer                     | - automatically dial a client's telephone number. (Requires modem.)   |
| 11 | - System Administration          | - System Administration and Set up Parameters.  |
| 12 | - Print Reports.                 | - Display the Reports menu.   |
| 13 | - Products.                      | - open the current Client's products window.  |
| 14 | - Agreements.                    | - open the current Client's agreements window.  |
| 15 | - Budgets.                       | - open the current Client's Budgets and Actuals window.   |
| 16 | - Activities.                    | - open the current Client's activities window. (Schedule and history.)  |
| 17 | - Service Cycles.                | - open the current Client's Service Cycles window.  |
| 18 | - Profiles.                      | - open the current Client's Profiles window.  |
| 19 | - Generate Services.             | - Open the Generate Services window.  |
| 20 | - Print Card.                    | - Prints a Client Card for the current Client.  |
| 21 | - Publish it with MS Word.       | - Copy data/report to MS Word (Word Processor).   |
| 22 | - Analyse it with MS Excel.      | - Copy data/report to MS Excel (Spreadsheet)  |

# General Functions Toolbar



- |                               |  |
|-------------------------------|--|
| 1 - Form View                 | - View data in Form view. i.e. one client at a time.                           |
| 2 - Datasheet View            | - View data in Datasheet view. i.i. as a list of clients (like a spreadsheet.) |
| 3 - Add New Client/s          | - Add a New record.  |
| 4 - Cut                       | - Cut (Delete highlighted text).   |
| 5 - Copy                      | - Copy highlighted text to the clipboard.                                      |
| 6 - Paste                     | - Paste text from the clipboard.   |
| 7 - Ascending Sort            | - Sort highlighted field/column in Ascending order.                            |
| 8 - Descending Sort           | - Sort highlighted field/column in Descending order.                           |
| 9 - Edit Filter/Sort.         | - Create or Edit filter or sort.   |
| 10 - Apply Filter/Sort.       | - Apply the current filter or sort specified.                                  |
| 11 - Show all Records filter. | - Display or Show all the records in the file. i.e. cancel current filter.     |
| 12 - Find                     | - Find information in current field or any field.                              |
| 13 - Undo field               | - Undo last operation.   |
| 14 - Undo field               | - Undo last change to current field/record                                     |

# Data Issues

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Three important areas need to be considered regarding the importance of keeping your data safe and secure. These are:

- Backing up Your Data
- Recovering Damaged Data
- Reattaching Data Files

# Backing Up Your Data.

Your **Advantage** data must be backed up on a regular basis. The following 2 files must be backed up.

**ADVDATA.MDB**  
**SYSTEM.MDA**

## In a Multi-User Environment

In a Multi-user environment both the above files will be installed in a directory on the server. Usually the network administrator ensures that daily backups of all data directories takes place. Make sure that your **Advantage** data forms part of the system backup procedures.

## From a Stand-Alone PC.

If you are working on a stand-alone PC (i.e. not as a multi-user application) then you are responsible for ensuring that a daily backup of your system is performed. We recommend the following as ESSENTIAL backup procedure:

Backup the two data files DAILY. If your system is installed to the ADV directory on C: drive then you must backup the following 2 files: (The slash represents a backslash.)

C:/ADV/ADVDATA.MDB  
C:/ ADV/SYSTEM.MDA

Use a separate set of diskettes for each day of the week. i.e. one set for Monday, one for Tuesday etc. Replace the five sets of daily backup disks at the end of each month.

## What can happen to your data:

- There are many possible causes of data damage:
- Power failures are the most common cause.
- Hard drive failure or damage.
- Lightning strikes or power surges.
- Viruses - you Must have anti-virus software installed.

# Recovering Damaged Data.

Should you experience corrupt data due to either power or hardware failure while updating your **Advantage** system (or any data damage) you will receive an error message as follows: "Unable to Open File ADVDATA.MDB - Repair and Compact Database".

In some instances the system is able to repair damage - but this does not always work so you may have to restore from your backups. A suggested recovery procedure is as follows:

- Before beginning the backup, make a backup or copy of your damaged ADVDATA.MDB file on a new set of backup disks - not over your last undamaged backup!
- can now attempt to repair and compact your data by double clicking on the **Repair and Compact Database** icon in your **Advantage** group.
- If the repair and compact is not successful then you may need to restore your last backup or call your supplier for support.



# Executive Overview

This is designed to give the executive or casual user a brief overview of what he can expect from the **Advantage** database marketing software system. He should be able to understand the major functions of the system and be in a position to take the first step of changing "competitors" into "followers", with less effort, and more recognition. If you as the aspirant executive are looking at meaningful ways to get started in the exciting world of computer technology then this is the place to start. Good luck - the future is never going to be the same - your electronic crystal ball beckons.

As companies approach the year 2000 we see marketing and sales as a business function grow in importance. A new definition in marketing is being born - marketing is about customer service, but not only that. It is about your ability to anticipate your clients' future requirements and deliver them today! In order to gain this almost psychic ability you as marketer must have tools at hand that allow you to adopt a customer-centric focus. On such tool is the **Advantage** database marketing software system.

[More...](#)



# Executive Overview

The system is designed to support all levels in an organisation:

1. A powerful sales and customer servicing tool with diary and detailed client information. This productivity tool will allow sales staff to handle 5 to 6 times as many prospects and customers than before. They will forge closer relationships because of access to detailed and integrated client records.
2. A strong management information tool for marketing and sales directors - as the sales and service people use the tools as a way to earn more commission and recognition so in turn management can have access to the most up-to-date competitive information, together with informative graphing ability.

**Advantage** is a tool designed for the whole company. Powerful, yet easy to use. Progressive companies will use the technology to gather information, segment markets, and attack the competition.

The proven database approach is work-group enabled - this means information is being transmitted more effectively within the organisation. Departments as we know them are disintegrating and in their place we see multifunctional teams where information is expected to flow up and down, and across, the organisation on a globally distributed basis.

Third Wave Software has developed in conjunction with its highly motivated customer base over the last 7 years a system that truly makes your competitors your followers. The following outline gives you a brief summary of the features of **Advantage**.

## System Features

# System Features

## **Ease of Use**

- Toolbar with InfoTips
- Fast sort on any field
- Simple query interface
- MS Office Compatible

## **Activity Management**

- Interactive diary and calendar
- Set follow-up dates
- Logs complete and incomplete activities

## **Contact Features**

- Notes logged by staff member and client
- Unlimited contacts per company
- Easy access to all salespersons contacts
- Unlimited keywords, tag contacts for specific areas of interest

## **Customer Servicing**

- Schedule regular call cycles
- Multiple cycles per client, contact and sales person
- Product level service prompts for agreement expiry dates
- Unlimited user-defined data input areas

System Features continued ...

# System Features

## **Prospecting**

- Track prospects along a sales path
- Identify sales probability
- Expected sales date, sales probability
- Track contact history, and activity history
- Sales forecasts, overdue activities
- Customer Servicing
- Categorise clients by type
- Set regular call cycles
- Maintain contract details & expiry dates
- Integrates with most accounting systems,
- Notes are logged by both staff and client contacts with auto-date stamp
- Track customer disputes and problems

## **Correspondence**

- Easy query selection tool - mail to contacts by designation, by competitor , by area etc.
- Link into your own word-processor
- Print Labels

System Features continued ...

# System Features

## Marketing

- Correlate financial data with marketing data, use the MS Office tools to do customized presentations,
- graphs and analyses with your data
- Powerful reporting and graphing features
- Marketing Promotion Analysis
- Competitor Marketing Analysis - business lost to whom and reason lost

## Management Analysis & Reporting

- Look at detailed activity statistics
- Compare actual versus targets by numerous criteria
- Do ratio analysis
- Output information to MS Word or MS Excel
- Powerful sort and query facility - just point, click or drag & drop !
- Email Links allows easy sharing of information - just click to send your information via Email programs.

## Advantage Open Code (optional add-on : Microsoft Access required)

- Complete access to all source code allows you to customize the system to your company's unique requirements
- Develop new forms, reports and modules to integrate with THIRD WAVE **Advantage.**



