

2010

Customer Relations Management In ProTrac

Creating Lists of Customer and Vendor
Contacts, in ProTrac

Distributors have to maintain an extensive range of contacts to keep up with the demands of the business.

Customer Contacts include: The President, All Family members, all levels of management, Accounting, Job Foreman, Truck Drivers, Multiple Branch Personnel, and the line staff. Those contacts need to be available when creating a **Sales Order, Work Order, or Quote.**

Vendor Contacts include: The Master Distributor, Marketing Department, Sales Department, their Salesman, Operations, and Accounting. These contacts are available when creating a **PO**

ProTrac's Contact Management offers our customers a way to keep as many contacts as they need, **in ProTrac.**



Customer Relations Management In ProTrac

TST-Customer Page1

Customer Page1 TST ProTrac(R) 8.21.03 MDC cm0001

Acct No: 14THST01 Name: 14TH STREET CONSTRUCTION

Address: 7415 W TEXAS AVE Phone: (972)963-5689 Ext: 658 SalesRep1: SUE
 Phone 2: (972)963-8698 Ext: 698 SalesRep2: JON
 FAX: (972)963-2245

Pstl Cd: 75050 Mobile: (972)555-6598

City: GRAND PRAIRIE State: TX Pager: PIN:

County: E-Mail: melc@pdsi.com

Country: Web Site: construction@14thstco.com

Billing Contact: JOHN MILLARD Order Contact: TOM PAYNE

Phone: (972)963-6652 Ext: 652 Phone: (972)963-6654 Ext: 654

FAX: (972)963-2245 Fax Stmt: No FAX: (972)963-2226 Fax Invoices: No

Customer Relations Management (CRM) takes many forms. The information starts with the company and the contacts that are a part of that company. ProTrac can have as many contacts as you want for each of your customers. We anticipate as more of our customers use this file its information will grow.

Last Prch Date: 04/16/2010
 Last Edit Date: 04/15/2010 By: MDC
 Date Created: 05/25/2006 By: MDC

Next Prev Add Edit Delete Brws ViewAR EInd 1)Rpt
 2)Pg2 3)Pg3 4)Pg4 5)Contacts 6)Util 7)Sis 8)Ship 9)Prc

ESC=Exit F9=Order History

Contacts cm0013

Acct No: 14THST01 Name: 14TH STREET CONSTRUCTION

Seq #	Contact	Nickname	Phone	Title	Department
3	Donna Anderson		(913)889-5645	President	
1	JOHN MILLARD		(972)963-6652		14TH STREET AIRCRAFT
2	Michael Anderson	Mick	(913)668-1256	VP Op	Operations
4	Stacie Anderson		(913)889-2564	Purchasing MGR	Purchasing

With ProTrac Contacts you can have an unlimited number of contacts for each of your customers. This list can be displayed from the Customer Maintenance File and from the 1st Page of Order Entry. Your SR can see a list of people from the company and select the correct one that is buying or ordering product. That name will print on the Pick Ticket, Invoice, or Work Order.

Each of the columns can be resorted by clicking on the column title.

Next Prev Add View Delete F5/Srch Exit

Customer Relations Management

To give our customers a faster way to access all of the people that they work with at their customer's place of business ProTrac offers a **Customer Contact Program**. This program is a part of our Customer Maintenance File.

If you need the name for the Purchasing person at 14th Street Construction you can check the companies contact list.

ProTrac will display a list of all Contacts, Their Title, Dept., Multiple Phone Numbers, Fax #, Pin # for their pager, Two (2) E Mail addresses, and the address of their location. You can even have a link to the customer's picture.

The Contact List for 14th St can be displayed when the SR is on the 1st page of the Order Entry program. Once displayed, they would select the person ordering and that name will be printed on the pick ticket and invoice

- Unlimited Contacts for each of your customers
- Main Phone Number
- Fax Phone Number
- Two E Mails
- Cell Phone Number
- Secondary Phone Number
- Birthday, Anniversary

Access the contacts from Order Entry, Quotes, Work Orders, Purchase Orders

Customer Relations Management In ProTrac

Contact Management

The information contained on these two Contact Screens will grow over time to meet the ever increasing demands by the marketplace. Note that the screens are not crowded which means that there is a lot of room for expansion.

The bottom screen has several fields that are waiting for requests from our customers and future customers.

We develop programs based on our customer's needs. To keep us from hearing only what they say and not what they meant, we let them work with a new program and then make changes to reflect their needs. The end product is a program that works without constant modifications.

Vendor Contact Information

The same Contact Information can be built for your vendors.

The Vendor File is available in the Vendor Maintenance and can be displayed when you are creating a new Purchase Order. The vendor and customer file are different files with the same format. The contact information will not be mixed. .

Contacts ProTrac Customer Relations Management cm0013

Acct No: 14THST01 Name: 14TH STREET CONSTRUCTION Seq: 2
Contact: Michael Anderson

First Name: Michael Last Name: Anderson
Title: VP Op Nickname: Mick

Department: Operations Phone: (913)668-1256 Ext: 556
Address: 6549 Wilson Phone 2: (816)688-9865 Ext:
Pager: (816)996-6352 PIN: 6594
Mobile: (913)968-6632

City, St PC: SHAWNEE KS 66216 FAX: (913)668-1200
Country:

E-Mail: 14thst@kc.rr.com
E-Mail: mike@kc.rr.com
Web Site: C:\Mel'sProTracPix\mikepdsi.jpg

E mail Addresses take you to Outlook Web Site / URL points to a picture file on the server. The picture would display on its own screen. .

Edit 2)Pg2 Exit

Enter data or press ESC to end.

Contacts cm0013

Acct No: 14THST01 Name: 14TH STREET CONSTRUCTION Seq: 2

Birthdate: 06/17/72 : No
Anniversary: 06/06/96 : No
Char 3: Date 1: / /
Dec 1: 0.00 Int 1: 0
Dec 2: 0.00 Int 2: 0

Personal Background Follow Up Dates

Mick and Donna started the company when they left Boeing. Mick is a stickler on fasteners as that was his job at Boeing
This is the second page of the Contact program. The fields named Birthdate and Anniversary are field names that the customer sets up. The remaining open fields are there to accommodate additional needs for future marketing programs.

May 3, 2010
We need to meet with Mick to talk about the new branch operation.
May 23, 2010 14th Street is having an Open House and we need to have a couple of people there along with our Tool Booth.

Edit 1)Pg1 Save Cancel Exit

Use the <Tab> key to move on to the <Save> button.