

2010

Customer Relations Management In ProTrac

Creating Lists of Customer and Vendor
Contacts, in ProTrac

Our ProTrac Customers 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 the Florist, Accounting, and the production staff. Those contacts need to be available in **Customer Maintenance** and when creating a **Sales Order or Quote**.

Vendor Contacts include: The **Growers**, Shippers, Master Distributor, Marketing Department, Sales Department, their Salesman, Operations, and Accounting. These contacts are available in **Vendor Maintenance** and when creating a **Purchase Order**

ProTrac's New Contact Management software offers our customers a way to keep as many Customer and Vendor Contacts as a part of **ProTrac**.

No 3rd Party software to buy, support, or learn.



Customer Relations Management In ProTrac

TST-Customer Page1

Customer Page1 TST ProTrac(R) 8.21.03 MDC cm0001

Acct No: A1CAN01 Name: A 1 CANMAN FLORAL

Address: 7214 College Blvd Phone: (913)504-9879 Ext: SalesRep1: SUE
 Phone 2: Ext: SalesRep2:
 FAX: (913)504-9877

Pstl Cd: 66210 Mobile: (913)504-4987

City: OVERLAND PARK State: KS Pager: (816)654-6598 PIN: 4587

County: E-Mail: a1canman@aol.com

Country: USA Web Site: www.a1canmanflorist.com

Billing Contact: TOM PAYNE Order Contact: MARY PAYNE
 Phone: (913)049-8797 Ext: Phone: (913)504-9879 Ext:
 FAX: (913)504-9875 Fax Stmt: No FAX: (913)504-9875 Fax Invoices: No

Customer Relations Management takes many forms. ProTrac has a list of all contacts for a customer and for a vendor. The customer list is kept in the Customer Maintenance File and displayed in Orders, Quotes, and Purchase Orders.

With ProTrac you can have as many contacts for a customer or for a vendor as you want.

Last Prch Date: 11/24/2009
 Last Edit Date: 04/26/2010 By: MDC
 Date Created: 09/20/2005 By:

Next Prev Add Edit Delt Brws NewAR Find 1)Rpt

Contacts ProTrac's Contact Manager cm0013

Acct No: A1CAN01 Name: A 1 CANMAN FLORAL

Seq #	Contact	Nickname	Phone	Title	Department
1	TOM PAYNE	TJ	(913)504-9879	Store Manager	Store Manager
2	Mary Payne		(816)931-6940	Store Manager	Store Manager
3	Frank Lavery		(816)699-6698	Store Manager	Store Manager
4	John Simmons		(913)546-5542	Store Manager	Store Manager
5	Mary Alice Thompson		(816)441-2532	Store Manager	Store Manager
6	John Canman		(913)504-9879	Owner	Owner
7	Danny White	Dan	(913)504-9879	Cut Flower Buyer	Purchasing

When your Sales rep is on the 1st page of an order this list can be displayed to ensure who they are talking to and to ensure that they are authorized to buy product.

Next Prev Add View Delete F5/Srch Exit

Customer Relations Management

To give our customers a faster way to access all of their customer's employees, 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 A 1 Canman Florists can be displayed when the SR is on the 1st page of the **Order Entry program or Quote**. Once displayed, they would select the person ordering product and that name will be printed on the pick ticket and invoice.

Unlimited Contacts for each of your customers
 Main Phone Number Cell Phone Number
 Fax Phone Number Secondary Phone Number
 Two E Mails 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: On the bottom screen, The boxes called **Personal Background** and **Follow up Date** are named by the customer. Even the fields that are labeled **Birth date** and **Anniversary** are customer named.

Report Writer

Using one of the fields on the bottom screen, you might create a title code for each employee. You would use one of the fields as a title type, ie purchasing. Then you could use our **Results Report Writer** to give you a list of all purchasing people who work for your customers.

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 in Vendor Maintenance and when you are creating a new Purchase Order.

Contacts cm0013

Acct No: A1CAN01 Name: A 1 CANMAN FLORAL Seq: 6
 Contact: John Canman

First Name: John Last Name: Canman
 Title: Owner Nickname:

Department: Owner Phone: (913)504-9879 Ext:
 Address: 7214 College Blvd Phone 2: (816)587-9317 Ext: 125
 Pager: () - PIN:
 Mobile: (913)552-4125
 City, St, PC: OVERLAND PARK KS 66210 FAX: (913)504-9875
 Country:

E-Mail: jcanman@a1canman.com
 E-Mail2:
 Web Site: C:\Mel'sProTracPix\mikepdsi.jpg

**The E Mail takes you to Outlook
 The Website URL is set to a picture file on the server**

Edit 2)Pg2 Exit

Enter the contact's first name.

Contacts ProTrac Customer Relations Management cm0013

Contacts cm0013

Acct No: A1CAN01 Name: A 1 CANMAN FLORAL Seq: 6

Birthdate: 9/20/49 : No
 Anniversary: 5/1/1975 : No
 Char 3: Date 1:
 Dec 1: 0.00 Int 1: 0
 Dec 2: 0.00 Int 2: 0

Personal Background Follow Up Dates

John took over the business from his father in 1990. Tom Payne, Store Mgr may have a stake in the business, not sure
 May 1, 2010 Meet with John and Tom to discuss a new location that they are considering.

This is the 2nd page of the Contact File. The field names for Birthdate and Anniversary are field names that the distributor choses. Information from these fields can be accessed with ProTrac's Report Writer, Results.

The remaining open fields are there to give a new customer maximum flexibility to track a market code of the distributor's design.

Edit 1)Pg1 Exit

Enter data or press ESC to end.