



ActiveControl

September 2, 2007





ActiveControl provides CRM and SFA

- ▶ **Customer Relationship Management [CRM]**

Def. — Set of processes and supporting technologies used to acquire, retain and enhance customer relationships

- ▶ **Sales Force Automation [SFA]**

Def. — A system that automatically records all the stages in a sales process. SFA includes a contact management system which tracks all contact that has been made with a given customer, the purpose of the contact, and any follow up that might be required. This ensures that sales efforts won't be duplicated eliminating the risk of irritating customers. SFA also includes a sales lead tracking system, which lists potential customers through paid phone lists, or customers of related products. Other elements of a SFA system can include, sales forecasting, order management and product knowledge. [Wikipedia]



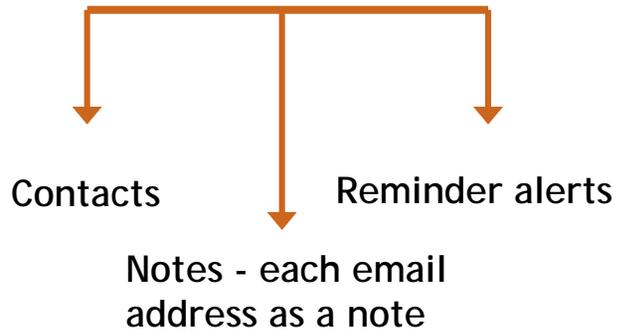


Expanding the capability of Eagle

Eagle

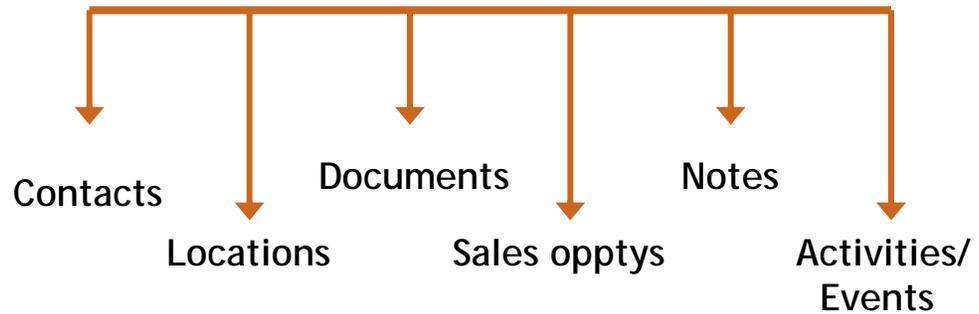
▶ Customer

- Multiple ship-to addresses
- Job/location



ActiveControl

▶ Customer



▶ Calendar

- Personal
- All





Main Screen

▶ Header section

Features key top-level information including:

- Main contact's info
- Total sales-to-date from Eagle
- Clock in the customer's time-zone
- Date that Eagle was last updated with cust. info
- Includes link for:
 - Adding a new customer
 - Updating Eagle with customer info
 - Searching for a particular customer record
 - Finding a set of records that match various criteria

▶ Midsection

- Current sales opportunity info-at-a-glance
- Sales-rep info
 - Ability to pull up all of the rep's accounts

▶ Tab section: Contact notes

- Notes regarding each customer interaction
- Shows info on any related activity, e.g. quote approval, customer fax, etc.
- Includes link for:
 - Viewing quota information
 - Viewing the rep's daily planner/calendar

Note:

Green is in the middle of the visible spectrum and is easiest on the eyes





Main control area – fits in a 800 x 600 monitor screen

Active Control - [Customers]

Customer # **NEW** Farm Name (or doing business as) **SEARCH TO EAGLE** Primary/Key Contact Call by: ID Status: **1.0.53**
159853 JENNA SMITH 3/6/2003 JENNA SMITH JENNA CUSTOMER
FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM NOT DONE
Sales To-Date 203 CHRISTIAN RIDGE RD Email: JENNASMITH@ADELPHIA.NET Call OK
\$2,241 SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Use as reference
Archive this cust

est value mos to hit temp what affects buy decision competition other info to remember about this oppty sales rank account manager
\$0 0 HOT See Notes TODAY'S MY ACCTS

Notes | Contacts | Locations | Farm Info | Documents | Acct AR Summary | Sales Opptvs | Open Est/Orders | Activities

REPORT	MY QUOTA	GO TO CALENDAR PLANNER	NEW NOTE	Note-Related Activities		
status	date	note	add new note before scheduling a note-related activity	user	dates	activity type
info	3/23/2006	Jeff is going to go up there today to make measurements will call me when he gets there around 10.	Veronica_G			
id: 195067	9:05 AM		<input type="checkbox"/> from cust		D	SCHEDULE
info	3/17/2006	if I was Jenna I would get a different contractor this is the third time this guy has put this off for lame reasons, he will now go verify measurements on Monday .	Veronica_G			
id: 192685	10:02 AM		<input type="checkbox"/> from cust		D	SCHEDULE
info	3/14/2006	Jeff is going up there tomorrow will call in the morning	Veronica_G			
id: 191089	10:32 AM		<input type="checkbox"/> from cust		D	SCHEDULE
info	3/9/2006	spoke to Jeff he asked me to fax Jennas layout and he will revise.	Veronica_G			
id: 189669	3:13 PM		<input type="checkbox"/> from cust		D	SCHEDULE

Record: 1 of 1

Start | PowerTCP 2.01 | Maki to Eagle Interf... | Active Control - [... | My Computer | 1:43 PM





2nd Tab: Provides ability to keep contact info for multiple people

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH** TO EAGLE Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

3/6/2003 JENNA SMITH JENNA NOT DONE

08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM Call OK

Sales To-Date 203 CHRISTIAN RIDGE RD Email: JENNASSMITH@ADELPHIA.NET Use as reference

\$2,241 SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Archive this cust

est value \$0 mos to hit 0 temp HOT what affects buy decision competition other info to remember about this oppty See Notes sales rank account manager TODAY'S MY ACCTS

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvts Open Est/Orders Activities

NEW CONTACT		Name and Title				Eastern Std Time	Communication Preferences				
salutation	prefix	first	middle	last	suffix	best time	phone numbers		ext	type	
		Farm				8:00 AM	primary	207	221-3119		home
3013		title:				8:00 PM	alt				
key		note:				from ACT!	cell				
contact						H	fax				
mail to?	<input checked="" type="checkbox"/>					C	email1				
appt req	<input type="checkbox"/>					W	email2				
eNews OK	<input type="checkbox"/>	location	Farm	birthday	dd/yy						
JENNA		JENNA		SMITH		8:00 AM	primary	207	221-3119		
60178		title: SCOTT				8:00 PM	alt				home
key	<input checked="" type="checkbox"/>	note:				from ACT!	cell	<input checked="" type="checkbox"/>	207	592-8922	
contact	<input type="checkbox"/>					H	fax				
mail to?	<input checked="" type="checkbox"/>					C	email1	<input checked="" type="checkbox"/>	JENNASSMITH@ADELPHIA.NET		
appt req	<input type="checkbox"/>					W	email2	<input type="checkbox"/>			
eNews OK	<input type="checkbox"/>	location	Main	birthday	dd/yy						

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [... My Computer 1:46 PM





Tracks multiple locations independent of a particular person

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH TO EAGLE** JENNA SMITH Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD Email: JENNASSMITH@ADELPHIA.NET Call OK

SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Use as reference Archive this cust

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Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Ooptvs Open Est/Orders Activities

location type	address	city, state, zip+4	country (nonUS postal code)	USE FOR mail	ship
Main	203 CHRISTIAN RIDGE RD	SOUTH PARIS ME 04281	USA	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/> address has been verified with USPS for shipping samples	Verify for USPS Ship	
			USA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/> address has been verified with USPS for shipping samples	Verify for USPS Ship	

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer] 1:48 PM





Main Screen, Tab Section, 4th Tab

► Special Info

in this case information about the farm and the types of products installed

- Information helps in sales advise and conversations
- Also includes a lookup capability to find existing installations that the customer can go see
- This tab area would be customized for each company that purchases ActiveControl





Active Control - [Customers]

Customer # **NEW** **159853** Farm Name (or doing business as) **SEARCH TO EAGLE** JENNA SMITH Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: **1.0.53** CUSTOMER

FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD Email: JENNASMITH@ADELPHIA.NET Call OK

SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Use as reference Archive this cust

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Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvs Open Est/Orders Activities

FARM INFORMATION

farm name (or doing business as) JENNA SMITH

of horses 2 acres horse breeds website lead source RESTORING ANTIQUE BARN

PURCHASED AND INSTALLED:

- Flex Fencing **Find Owners**
- Electric Fencing **Find Owners**
- Vinyl Fencing **Find Owners**
- Wiremesh Fencing **Find Owners**
- Stall Systems **Find Owners**

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer] 1:52 PM





Provides ability to attach documents to a sales account

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH TO EAGLE** JENNA SMITH Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM Email: JENNASMITH@ADELPHIA.NET **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Call OK Use as reference Archive this cust

est value \$0 mos to hit 0 temp HOT what affects buy decision competition other info to remember about this oppty See Notes sales rank account manager TODAY'S MY ACCTS

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvys Open Est/Orders Activities

NEW DOCUMENT to add a document: put your cursor in the form-field for "path" then use the hyperlink icon above [a globe with a chin link]

document name	path	type	Date/Time
picture of barn - inside	\\10.0.0.2\RammShared\JodiRay1.bmp		1/23/2006 2:08:31 PM

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer 2:09 PM





Displays account information from Eagle

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH TO EAGLE** JENNA SMITH Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD SOUTH PARIS ME 04281 USA Email: JENNASMITH@ADELPHIA.NET Call OK Use as reference Archive this cust

See Notes; sister of Sally Shabaka

est value \$0 mos to hit 0 temp HOT what affects buy decision competition other info to remember about this oppty See Notes sales rank account manager TODAY'S MY ACCTS

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvys Open Est/Orders Activities

ACCOUNT INFORMATION

Balance		Current			
\$0.00		\$0.00			
aged 1 to 30	aged 60 to 90	aged over 90	Sales YTD	Sales LYR	Proj to End of Yr
\$0.00	\$0.00	\$0.00	\$738.81	\$0.00	\$0.00
date of last pymt		amt of last pymt			
11/30/1899		\$0.00			

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer] 2:10 PM





History of sales opportunities. The most current sales opportunity here shows up in blue area

Active Control

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH** TO EAGLE Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD SOUTH PARIS ME 04281 USA Email: JENNASMITH@ADELPHIA.NET Call OK Use as reference Archive this cust

See Notes; sister of Sally Shabaka

est value \$0 mos to hit 0 temp HOT what affects buy decision competition other info to remember about this oppty See Notes sales rank account manager TODAY'S MY ACCTS

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Opptys Open Est/Orders Activities

NEW OPPTY	curr	est value	mo to hit	temp	what affects buy decision?	competition	note	duration	user
<input checked="" type="checkbox"/>	\$0.00	0	HOT				See Notes	9/7/2004	ACT_data
result									01-Aug-2005
<input type="checkbox"/>								3/23/2006	super_user
result									23-Mar-2006

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [... My Computer 2:12 PM





Displays estimates and open orders from Eagle for this cust.

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH** JENNA SMITH **TO EAGLE** 3/6/2003 Primary/Key Contact JENNA SMITH Call by: JENNA ID Status: 1.0.53 CUSTOMER

FIND Main Location: "I" for Int! 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM **NOT DONE**

Sales To-Date \$2,241 203 CHRISTIAN RIDGE RD Email: JENNASMITH@ADELPHIA.NET Call OK

SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Use as reference Archive this cust

est value \$0 mos to hit 0 temp HOT what affects buy decision competition other info to remember about this oppty See Notes sales rank account manager TODAY'S MY ACCTS

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvys Open Est/Orders Activities

trx no	type	trx date	est no	total wo tax	# of lines	b/o item	delivery date	sku	sku description	selling price	sales person
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	NS11	4"x4"x7' POST	\$120.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	WB10B15	10' WLD STALL FRT/FD&VD BLK	\$698.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	NS24	10'Stall front w/mesh & fd	\$548.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	WB12GP	12' WLD STALL GRILL PART BLK	\$341.05	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	48GWB	48" GRILLWORK SECTION BLACK	\$123.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006		I have not added freight to this	\$0.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006		order as of yet due to the out	\$0.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006		time.	\$0.00	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	WB10GP	10' WLD STALL GRILL PART BLK	\$312.55	VG
19210	E	1/27/2006	19210	\$6,070.30	10	0	27-Jan-2006	65GWB	65" GRILLWORK SECTION BLACK	\$135.00	VG

Record: 1 of 1

Active Control - [Customers]

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer] 2:14 PM



Many different types of events/activities can be tracked

Active Control - [Customers]

Customer # **NEW** 159853 Farm Name (or doing business as) **SEARCH** TO EAGLE Primary/Key Contact Call by: ID Status: 1.0.53
 JENNA SMITH 3/6/2003 JENNA SMITH JENNA CUSTOMER
 FIND Main Location: "I" for Int'l 08:57:03 PM Duration: 0:10 Phone: 207 592 8922 8:00 AM 8:00 PM NOT DONE
 Sales To-Date 203 CHRISTIAN RIDGE RD Email: JENNASMITH@ADELPHIA.NET Call OK
 \$2,241 SOUTH PARIS ME 04281 USA See Notes; sister of Sally Shabaka Use as reference
 Archive this cust

est value mos to hit temp what affects buy decision competition other info to remember about this oppty sales rank account manager
 \$0 0 HOT See Notes TODAY'S MY ACCTS
 Current Sales Opportunity

Notes Contacts Locations Farm Info Documents Acct AR Summary Sales Optvys Open Est/Orders Activities

NEW ACTIVITY										REFRESH		
	plan date time	event date time	min before	duration	event type	person to do	done	cancel	note id	activity id		
R	1/23/2006 9:30:00 AM	1/23/2006 5:44:43 PM	10	9	phone call: attempt	Veronica_G	<input checked="" type="checkbox"/>	<input type="checkbox"/>	mediu	81437		
R	11/7/2005 9:30:00 AM	1/23/2006 5:44:35 PM	10	9	phone call: attempt	Sally Shabaka	<input checked="" type="checkbox"/>	<input type="checkbox"/>	mediu	22349		
R	10/21/2005 3:30:00 PM	1/23/2006 5:44:29 PM	10	9	email send	Sally Shabaka	<input checked="" type="checkbox"/>	<input type="checkbox"/>	mediu	79896		
R	8/8/2005 11:21:14 AM	8/8/2005 11:21:14 AM	10	9	quote approved by Kim	Sally Shabaka	<input checked="" type="checkbox"/>	<input type="checkbox"/>	mediu	70920		
R	8/5/2005 1:17:17 PM	8/5/2005 1:17:17 PM	10	9	quote sent to Kim	Sally Shabaka	<input checked="" type="checkbox"/>	<input type="checkbox"/>	mediu	70898		
R							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		(AutoNu		

Record: 1 of 1

Start PowerTCP 2.01 Maki to Eagle Interf... Active Control - [My Computer] 2:18 PM





Clicking on "SEARCH" brings up this screen for looking up a cust.

The screenshot shows the 'Active Control - [Customers]' application window. At the top, a customer record is displayed for 'JENNA SMITH' with ID 159853. A 'Customer Selection: Find a Single Customer' dialog box is open, prompting the user to enter search criteria. Below the dialog, a table of customer records is visible, including notes and scheduling options.

id:	Time	Notes	from cust	SCHEDULE
192685	10:02 AM	time this guy has put this off for lame reasons, he will now go verify measurements on Monday .	<input type="checkbox"/>	SCHEDULE
191089	10:32 AM	Jeff is going up there tomorrow will call in the morning	<input type="checkbox"/>	SCHEDULE
189669	3:13 PM	spoke to Jeff he asked me to fax Jennas layout and he will revise.	<input type="checkbox"/>	SCHEDULE





Clicking on "FIND" brings up this screen. "GO" will load all customer records that meet the desired criteria for viewing them in the main screen.

Active Cont

Find the type of search you would like to do from the following list

SELECT ALL

By calendar day Customers I planned to contact on mm/dd/yy **GO** **CANCEL** **CUSTOMERS TO ARCHIVE**

click here if you want to search ONLY your customers (not all):

By farm/dba name	<input type="text"/>	GO	By note text	<input type="text"/>	GO
By city	<input type="text"/>	GO	By birthday	mm <input type="text"/>	GO
By state	<input type="text"/>	GO	By preferred time	start <input type="text"/> end <input type="text"/>	GO
By zip	<input type="text"/>	GO	By # of acres	<input type="text"/>	GO
By area code	<input type="text"/>	GO	By # of horses	<input type="text"/>	GO
By contact name	<input type="text"/>	GO	By horse breed	<input type="text"/>	GO
By email address	<input type="text"/>	GO	By sales-to-date	> <input type="text"/> < <input type="text"/>	GO
By sales rank	<input type="text"/>	GO	By activity type	<input type="text"/>	GO
By oppty amount	> <input type="text"/>	GO	By lead source	<input type="text"/>	GO
By oppty mo's to hit	< <input type="text"/>	GO			
By oppty temp	<input type="text"/> hot	GO			
By competition	<input type="text"/>	GO			

Record: 1 of 1

Start | PowerTCP 2.01 | Maki to Eagle Interf... | Active Control - [...]

My Computer 2:22 PM





Screen for entering a new customer account

Active Control - [New Prospect or Customer]

Cust number: 212812
Farm name or doing business as:
ID_Status: prospect
Lead source:
Info to remember about customer:
Salesperson: super_user
Sales rank: medium
New processed:
Call OK:
Use as reference:
Local Delivery:
 ↑use this for important info to see each time you look at this customer record

FARM INFORMATION

acres:
of horses:
horse breeds:
website:



LOCATIONS

Location type: Main Use for mail Use for ship
Street address:
More address info:
City:
State: Zip or Postal Code:
Country: USA Hrs diff from EST:
Location note:
Record: 1 of 1

CONTACTS TO EAGLE

Prefix:
First Name:
Middle:
Last Name:
Suffix:
Title:
Contact located at: Main
Key Contact?

AutoNumber:
Best time to contact, Eastern Standard Time [EST]
starts: 8:00 AM ends: 8:00 PM EST
Best means of contact:
Ext:

Prefs:
 Phone Number
 Cell Number
 Alt Phone Num
 Fax Number
 Email primary

tab through white boxes, then pause a couple of seconds after entering the phone number for phone duplicate check
be sure to get this





Here is the Main Menu for reports and administration

The screenshot shows a web browser window titled "Active Control". The main content area displays the "Main Menu" with three primary categories: SFA (Sales Force Automation), CRM (Customer Relationship Management), and BI (Business Intelligence). Each category includes a list of reports and tasks. Below these categories are three links: "Return to Contact Screen", "Database Maintenance", and "Mail Labels". At the bottom of the page, there is a copyright notice: "Active Control -- a CRM/SFA/BI Application by Active Lightning ©2005 Active Lightning and Ramm Fence, Inc." The browser's taskbar at the bottom shows several open applications, including "PowerTCP 2...", "Maki to Eagl...", "Customers", and "frmMainMen...". The system tray on the right shows the time as 2:32 PM.

Main Menu

SFA **SALES FORCE AUTOMATION**
reports per salesperson, opportunity management, sales-related tasks

CRM **CUSTOMER RELATIONSHIP MANAGEMENT**
mail lists, customer history report, reports by customer

BI **BUSINESS INTELLIGENCE**
trends analysis, big picture information, year-end reporting

[Return to Contact Screen](#)

[Database Maintenance](#)

[Mail Labels](#)

Active Control -- a CRM/SFA/BI Application by Active Lightning
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Management can put out a message to the sale force that they will see when they launch the application to begin their day

Calendar Planner interface showing a calendar for March 2006, a central message window, and a call log table.

Calendar: March 2006. Today: 3/23/2006. The 23rd is circled in red.

Message Window:

March = In like a LION, out like a LION!

Keep focused on making yours calls, and making your calls count! A smile on your face goes a LONG way.

We know where we need to be, we know what to do to get there....LET'S GET ER' DONE!

Call Log Table:

time	planned time	cust #	customer name	action	priority	done	cancelled
8:00 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
8:30 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
9:00 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
9:30 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
10:00 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
10:30 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
11:00 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
11:30 AM	S					<input type="checkbox"/>	<input type="checkbox"/>
12:00 PM	S					<input type="checkbox"/>	<input type="checkbox"/>
12:30 PM	S	12:35 PM	212380	J	medium	<input type="checkbox"/>	<input type="checkbox"/>
12:30 PM	S	12:54 PM	211646	T	medium	<input type="checkbox"/>	<input type="checkbox"/>
12:30 PM	S	12:57 PM	206208	C	medium	<input type="checkbox"/>	<input type="checkbox"/>
12:30 PM	S	12:59 PM	208796	BOB HODGE	medium	<input type="checkbox"/>	<input type="checkbox"/>
1:00 PM	S	1:02 PM	201862	Adam DeMerchant	medium	<input type="checkbox"/>	<input type="checkbox"/>
1:30 PM	S	1:47 PM	209793	LEANN LASHUA	medium	<input type="checkbox"/>	<input type="checkbox"/>
2:00 PM	S	2:03 PM	212247	Teale Brown-Moore	medium	<input type="checkbox"/>	<input type="checkbox"/>
2:30 PM	S					<input type="checkbox"/>	<input type="checkbox"/>
3:00 PM	S					<input type="checkbox"/>	<input type="checkbox"/>





Calendar Planner

- ▶ Calendar Planner is the first screen that a sales rep goes to when the application launches
- ▶ Month at a glance is featured in upper left corner
- ▶ Timecard: start and stop are featured in the upper right corner
- ▶ The scheduled calls for the day are shown in the body of the screen





Contact Calendar Planner

use this button to close this planner and go to contacts -->

after you select a date, click on the "Refresh" button

click on the cust # or the cust name in order to go to that customer -- in the main contacts screen

Calendar Planner
Veronica_G
Thursday, March 23, 2006

Start Timecard
Stop Timecard
Activities Sched But Not Done

March 2006

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Today: 3/23/2006

time	planned time	cust #	cust name	contact name	contact type	priority	done	cancelled	
9:30 AM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
10:00 AM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
10:30 AM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
11:00 AM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
11:30 AM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
12:00 PM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
12:30 PM	S	12:35 PM	212380	Joanna Summerlin	Joanna Summerlin	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12:30 PM	S	12:54 PM	211646	Tara Moulton	Tara Moulton	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12:30 PM	S	12:57 PM	206208	DAWN VANDERMAY	DAWN VANDERMAY	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12:30 PM	S	12:59 PM	208796	BOB HODGE	BOB HODGE	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1:00 PM	S	1:02 PM	201862	Adam DeMerchant	Adam DeMerchant	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1:30 PM	S	1:47 PM	209793	LEANN LASHUA	LEANN LASHUA	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2:00 PM	S	2:03 PM	212247	Teale Brown-Moore	Teale Brown-Moore	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2:30 PM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3:00 PM	S						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
3:30 PM	S	3:30 PM	202251	JACQUELINE LaFLEURE	JACQUELINE LaFLEURE	phone call: attempt	low	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3:30 PM	S	3:40 PM	201714	SANDRA SYCHAK	SANDRA SYCHAK	phone call: attempt	low	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3:30 PM	S	3:42 PM	208762	Erin Heffernan	Erin Heffernan	phone call: attempt	medium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Windows taskbar: Start, PowerTCP 2.01, Maki to Eagle Interf..., Active Control - [...], My Computer, 2:39 PM





Ability to easily see the call/contacts that were planned but not done

after you select a date, click on the "Refresh" button

use this button to close this planner and go to contacts -->

Contact Calendar

March 2006

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25

Calendar Planner

Veronica_G

Thursday, March 23, 2006

Start Timecard

Stop Timecard

Scheduled Contacts Not Done

	planned time	cust #	cust name	contact name	contact type	priority	done	cancelled			
S	23-Feb-2006	6:31 PM	207359	BILL FRIECO	BILL	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	23-Feb-2006	6:42 PM	209891	Jackie Feldman	Jackie Feldman	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	9:46 AM	208626	DEBBIE ALBERTSON	DEBBIE ALBERTSON	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	10:55 AM	210271	DIANE CURTICE	DIANE CURTICE	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	11:02 AM	106432	ELLEN SANDSTROM	ELLEN SANDSTROM	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	11:41 AM	203359	Katherine Monterosso	Katherine Monterosso	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	12:10 PM	180591	LEE HEDRICK	LEE HEDRICK	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	1:48 PM	206955	Frank A Noto III		phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	1:59 PM	169138	DAN MITCHEL	DAN MITCHEL	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	2:36 PM	209827	Cynthia Markus	Cynthia Markus	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:14 PM	200180	KATHLEEN RULE	KATHLEEN RULE	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:19 PM	206855	PATRICK JARDON	PATRICK JARDON	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:32 PM	210249	LORRAINE LUND	LORRAINE LUND	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:33 PM	185317	KELLY BENEDETTI	kelly maciorowski	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:37 PM	209716	wayne fontanella	wayne fontanella	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	3:49 PM	210818	ARLEN &NANCY DOW	ARLEN & NANCY DOW	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	4:02 PM	207356	DARLENE JACOBS	DARLENE	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	4:03 PM	206983	Amie McDonald	Amie McDonald	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	4:07 PM	206983	Amie McDonald	Amie McDonald	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S	24-Feb-2006	4:12 PM	209753	braxton shafiroff	braxton shafiroff	phone call: attempt	medium	D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Start

PowerTCP 2.01

Maki to Eagle Interf...

Active Control - [...]

My Computer

2:41 PM





Other features

- ▶ Duplicate checking across 4 different data points:
 - Company name
 - Email
 - Phone number
 - Zip + first 10 characters of street address

- ▶ Daily capture of sales performance for reporting

- ▶ Sales quota tracking

- ▶ Auto insertion of contact requests entered on the website, including assignment of sales rep

- ▶ Address verification via USPS

