



Marketing

Introduction

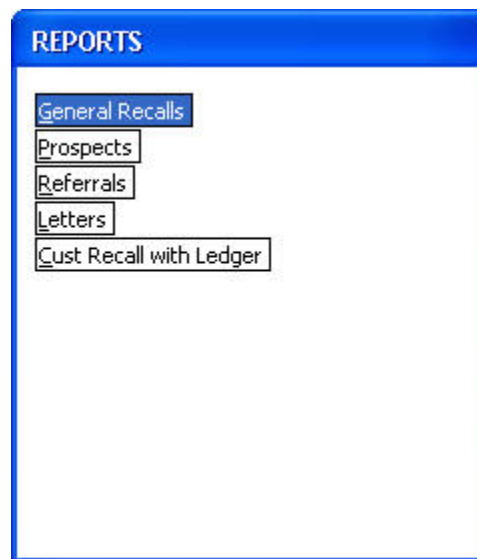
The Marketing report topics focus on reports associated with information used to market the customer base.

Items found in the Marketing section include:

- General Recalls
- Prospects
- Referrals
- Letters
- Cust Recall with Ledger

Marketing

This is an example of the Marketing option list:

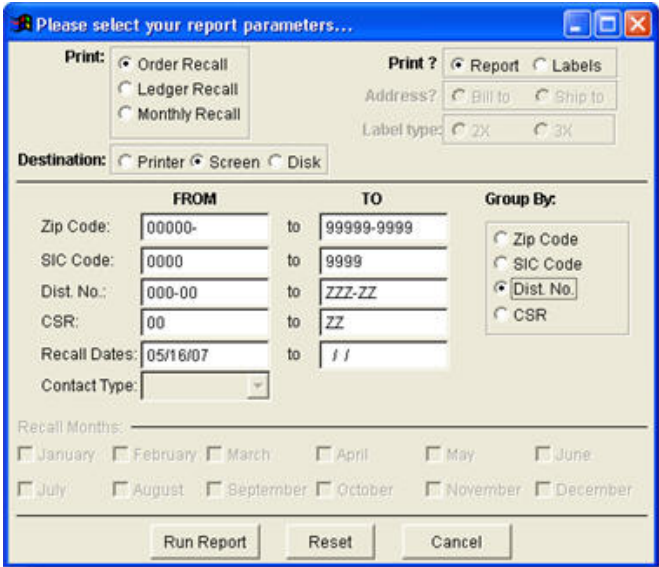


Continued on next page



General Recalls


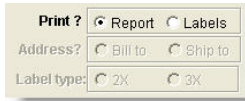
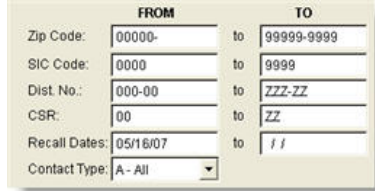
General Recalls The General Recalls report allows you to create a report for any one of the three recall types in CMS; General [located on the customer screen], Order [located on the product line of an order] or Ledger [prints recalls entered on the ledger].

Step	Action
1	Navigate to General Recalls from the Reports menu in CMS by clicking on the Sub-menu title Marketing.
2	Click the General Recalls link.
3	The General Recalls Report Screen will appear:  <p>Select the report option based on the report you would like to generate.</p> <ul style="list-style-type: none">➤ Order Recall - used to locate customers with an order recall.➤ Ledger Recall - used to locate customers with a ledger recall.➤ Monthly Recall – used to locate customers with a monthly recall

Continued on next page





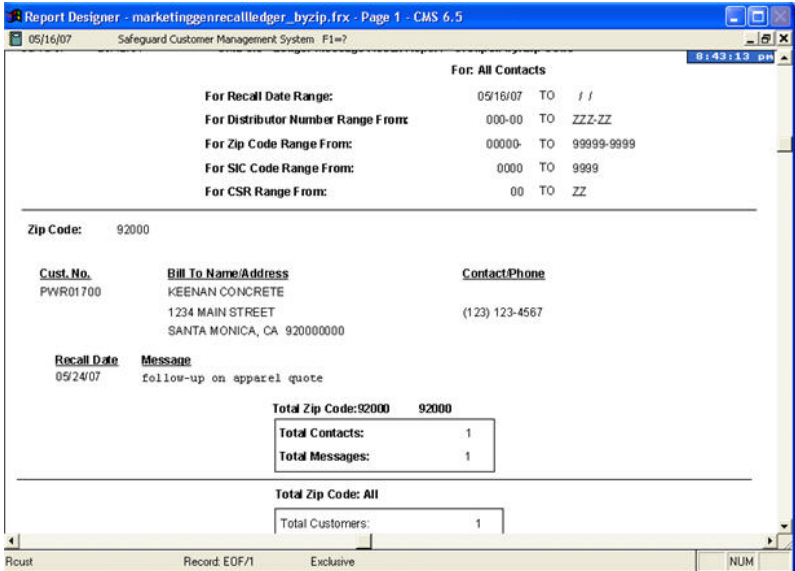
General Recalls, cont.

Step	Action
4	Once you have selected the appropriate report, Tab through and Select the additional fields based on the options presented.
5	<p>Destination:</p>  <ul style="list-style-type: none"> ➤ Printer - Sends the report straight to the Printer. ➤ Screen - Allows you to view the report on Screen. ➤ Disk - Allows you to create a .txt version of the report. <ul style="list-style-type: none"> — You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels. — A Select File Name pop-up box will appear. — Type the name and press Enter.
6	<p>Print:</p>  <ul style="list-style-type: none"> ➤ Report – select this option if you just need to generate a report ➤ Labels – select this option if labels will be needed. <ul style="list-style-type: none"> — Address, pick either Bill To or Ship To — Label type, pick either 2up or 3up label stock
7	<p>From/TO:</p>  <ul style="list-style-type: none"> ➤ Zip Code – Enter the zip code range ➤ SIC Code – Enter the SIC code range ➤ Dist No - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers. ➤ CSR – Enter the CSR range ➤ Recall Dates - Enter the Recall Date range you would like to show on the report. ➤ Contact Type – Select the type of contact from the drop-down list. Choose from All, Customer, Prospect or Referral.

Continued on next page

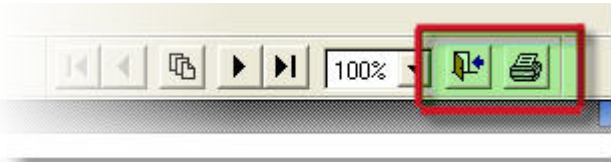


General Recalls, cont.

Step	Action																
8	<p>Group By:</p>  <ul style="list-style-type: none"> ➤ Zip Code – Enter the zip code range ➤ SIC Code – Enter the SIC code range ➤ Dist No - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers. ➤ CSR – Enter the CSR range 																
9	<p>Run Report:</p>  <p>Click the Run Report button.</p>																
10	<p>This is a sample of the Ledger Recall Report:</p>  <p>The screenshot shows a window titled 'Report Designer - marketinggenrecallledger_byzip.frx - Page 1 - CMS 6.5'. The report content includes:</p> <p>For: All Contacts</p> <p>For Recall Date Range: 05/16/07 TO //</p> <p>For Distributor Number Range From: 000-00 TO ZZ-ZZ</p> <p>For Zip Code Range From: 00000- TO 99999-9999</p> <p>For SIC Code Range From: 0000 TO 9999</p> <p>For CSR Range From: 00 TO ZZ</p> <hr/> <p>Zip Code: 92000</p> <table border="1"> <thead> <tr> <th>Cust. No.</th> <th>Bill To Name/Address</th> <th>Contact/Phone</th> </tr> </thead> <tbody> <tr> <td>PWR01700</td> <td>KEENAN CONCRETE 1234 MAIN STREET SANTA MONICA, CA 920000000</td> <td>(123) 123-4567</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Recall Date</th> <th>Message</th> </tr> </thead> <tbody> <tr> <td>05/24/07</td> <td>follow-up on apparel quote</td> </tr> </tbody> </table> <p>Total Zip Code: 92000 92000</p> <table border="1"> <tr> <td>Total Contacts:</td> <td>1</td> </tr> <tr> <td>Total Messages:</td> <td>1</td> </tr> </table> <p>Total Zip Code: All</p> <table border="1"> <tr> <td>Total Customers:</td> <td>1</td> </tr> </table> <p>Recall Record: E0F/1 Exclusive NUM</p>	Cust. No.	Bill To Name/Address	Contact/Phone	PWR01700	KEENAN CONCRETE 1234 MAIN STREET SANTA MONICA, CA 920000000	(123) 123-4567	Recall Date	Message	05/24/07	follow-up on apparel quote	Total Contacts:	1	Total Messages:	1	Total Customers:	1
Cust. No.	Bill To Name/Address	Contact/Phone															
PWR01700	KEENAN CONCRETE 1234 MAIN STREET SANTA MONICA, CA 920000000	(123) 123-4567															
Recall Date	Message																
05/24/07	follow-up on apparel quote																
Total Contacts:	1																
Total Messages:	1																
Total Customers:	1																

Continued on next page

General Recalls, cont.

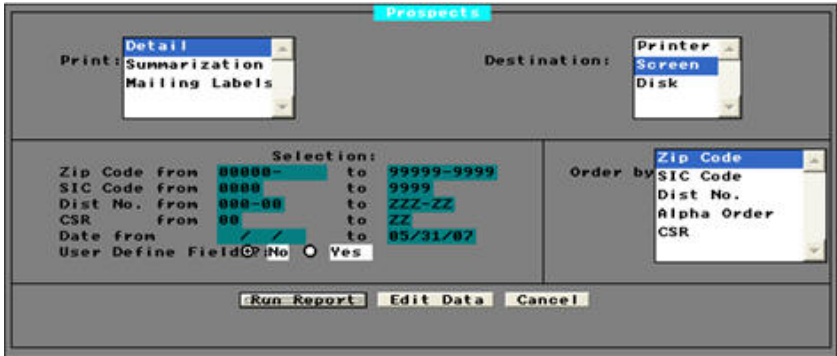
Step	Action
11	<p>Field Descriptions: These fields relate to the General Recall report output – check the CMS Manual for additional field descriptions.</p> <p>The fields at the top of the report refer to the previously selected criteria in the <i>To</i> and <i>From</i> fields.</p> <ul style="list-style-type: none"> → Zip Code – reflects the zip code for a grouping → Customer Number – reflects the customer number → Bill To Name and Address – reflects the customer's bill to name located on the customer record → Contact/Phone – reflects the name located in the contact field on the customer's record along with their specified phone number. → Recall Date- reflects the date associated with the recall message. → Message – reflects the message enter on the customer's ledger. → Total Contacts – reflects the total number of contacts for this zip code. → Total Messages – reflects the total number of messages for this zip code.
12	<p>To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.</p> <ul style="list-style-type: none"> ➤ Door - Exit ➤ Printer - Print  <p>Click on the option to select it.</p>
13	Press the ESC key to exit completely out of reports.



Prospects

Prospects


The Prospect Reports lists prospects and ledger messages in the specified date range to help you follow up on prospects and keep track of leads. This report only includes non-purged prospects.

Step	Action
1	Navigate to Prospects from the Reports menu in CMS by clicking on the Sub-menu title Marketing.
2	Click the Prospects link.
3	<p>The Prospects Report Screen will appear:</p>  <p>Select the report option based on the report you would like to generate.</p> <ul style="list-style-type: none"> ➤ Detail - lists prospect name, address, contact name, phone number and all listed messages in the selected ranges. ➤ Summarization - lists prospect name, address, contact name, phone number, and last contact date of prospects in the selected ranges. ➤ Mailing Labels – prints mailing labels for prospects in the selected date range.

Continued on next page



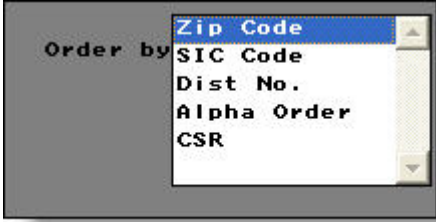

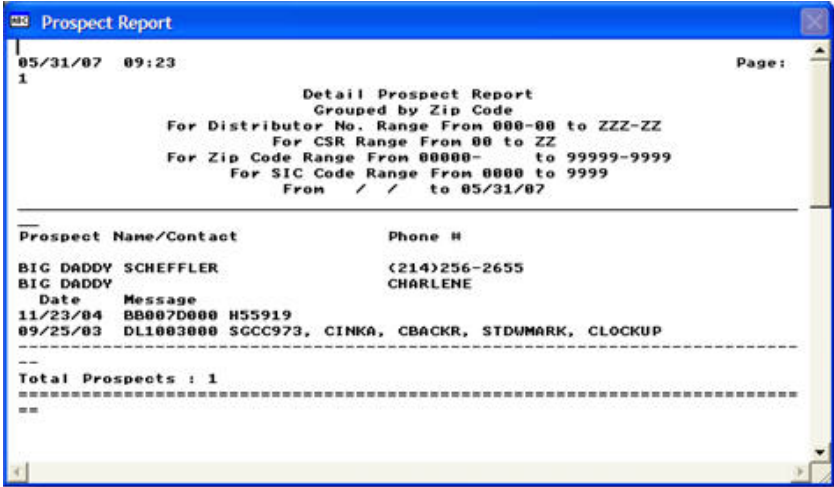
Prospects, cont.

Step	Action
4	Once you have selected the appropriate report, Tab through and Select the additional fields based on the options presented.
5	<p>Destination:</p>  <ul style="list-style-type: none">➤ Printer - Sends the report straight to the Printer.➤ Screen - Allows you to view the report on Screen.➤ Disk - Allows you to create a .txt version of the report.<ul style="list-style-type: none">— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.— A Select File Name pop-up box will appear.— Type the name and press Enter.
6	<p>Selection: Check the CMS Manual for additional field descriptions.</p> <ul style="list-style-type: none">➤ Zip Code From: To: – Enter the zip code range➤ SIC Code From: To: – Enter the SIC code range➤ Dist No From: To: - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers.➤ CSR From: To: – Enter the CSR range➤ Date From: To: - Enter the Date range you would like to show on the report.➤ User Defined Field– Default is NO, click in the radio button next to YES if you would like to use the User Defined Fields option. When selecting YES, a pop-up will appear giving you additional options.<ul style="list-style-type: none">— Click the edit button— Click the drop-down next to choice #1 and select either Title of Item. [NOTE: Title will reflect ALL items listed for that Title, Item will allow you to select just one.] Repeat this step for additional choices.

Continued on next page



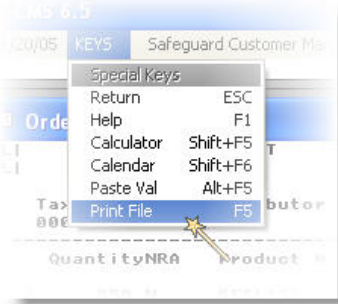
Prospects, cont.

Step	Action
7	<p>Order by:</p>  <ul style="list-style-type: none"> ➤ Zip Code – allows you to group the report by zip code ➤ SIC Code - allows you to group the report by SIC code ➤ Dist No – allows you to group the report by distributor number ➤ Alpha Order - allows you to group the report in alphabetical order by customer name ➤ CSR – allows you to group the report by the CRS field located on the customer record
8	<p>Run Report:</p>  <p>Click the Run Report button.</p>
9	<p>This is a sample of the Prospects Report:</p> 

Continued on next page



Prospects, cont.

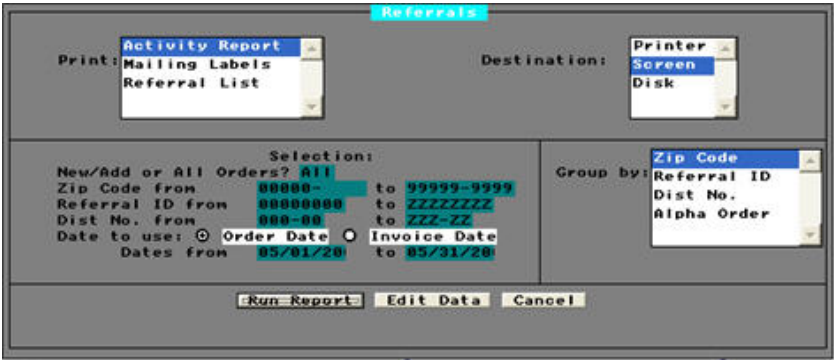
Step	Action
10	<p>Field Descriptions: These fields relate to the Details report output – check the CMS Manual for additional field descriptions.</p> <p>The fields at the top of the report refer to the previously selected criteria in the <i>Selection</i> fields.</p> <ul style="list-style-type: none">→ Prospect Name/Contact – reflects the company name and contact name located on the customer record→ Phone # – reflects the phone number→ Date – reflects the date of the message located on the customer's ledger→ Message – reflects the message or product history located on the customer ledger.→ Total Prospects – reflects the total number of prospects.
11	<p>To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.</p> <p>Click on the option to select it.</p> 
12	Press the ESC key to exit completely out of reports.



Referrals

Referrals


The Referral Reports list referral sources, customers referred and the total sales generated in the selected ranges.

Step	Action
1	Navigate to Referrals from the Reports menu in CMS by clicking on the Sub-menu title Marketing.
2	Click the Referrals link.
3	<p>The Referrals Report Screen will appear:</p>  <p>Select the report option based on the report you would like to generate.</p> <ul style="list-style-type: none"> ➤ Activity Report - Lists information for all Referrals in specified ranges. ➤ Mailing Labels – prints mailing labels for prospects in the selected date range. ➤ Referrals List - A master reference list of all Referrals in the specified ranges.

Continued on next page



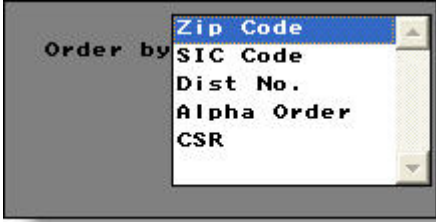

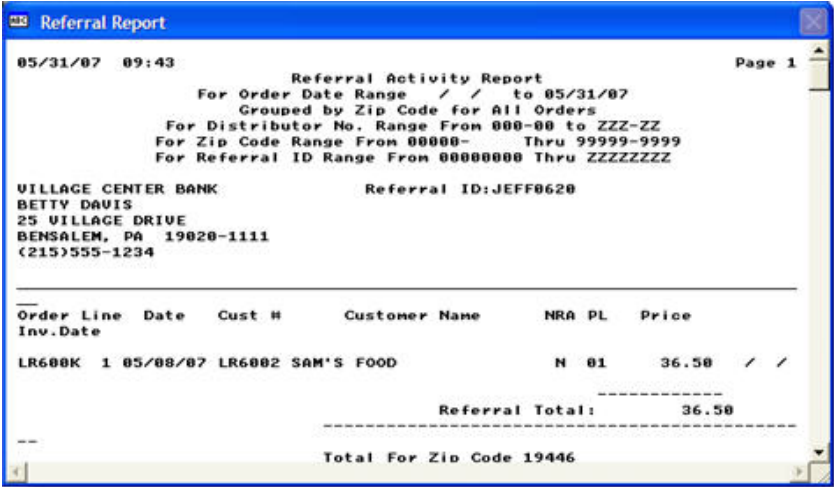
Referrals, cont.

Step	Action
4	Once you have selected the appropriate report, Tab through and Select the additional fields based on the options presented.
5	<p>Destination:</p>  <ul style="list-style-type: none">➤ Printer - Sends the report straight to the Printer.➤ Screen - Allows you to view the report on Screen.➤ Disk - Allows you to create a .txt version of the report.<ul style="list-style-type: none">— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.— A Select File Name pop-up box will appear.— Type the name and press Enter.
6	<p>Selection: Check the CMS Manual for additional field descriptions.</p> <ul style="list-style-type: none">➤ New/Add or All Orders – Use the spacebar to scroll through the options and select the desired output.➤ Zip Code From: To: – Enter the zip code range➤ Referral ID From: To: – Enter the SIC code range➤ Dist No From: To: - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers.➤ Dates to use – Click the radio button for the preferred option; the default is Order Date.<ul style="list-style-type: none">— Order date – shows a report based on a customer’s order history.— Invoice date – shows a report based on the customer’s invoice history➤ Date From: To: - Enter the Date range you would like to show on the report.

Continued on next page

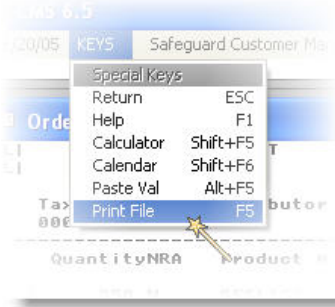


Referrals, cont.

Step	Action
7	<p>Group by:</p>  <ul style="list-style-type: none"> ➤ Zip Code – allows you to group the report by zip code ➤ SIC Code - allows you to group the report by SIC code ➤ Dist No – allows you to group the report by distributor number ➤ Alpha Order - allows you to group the report in alphabetical order by customer name ➤ CSR – allows you to group the report by the CRS field located on the customer record
8	<p>Run Report:</p>  <p>Click the Run Report button.</p>
9	<p>This is a sample of the Referrals Report:</p> 

Continued on next page

Referrals, cont.

Step	Action
10	<p>Field Descriptions: These fields relate to the Details report output – check the CMS Manual for additional field descriptions.</p> <p>The fields at the top of the report refer to the previously selected criteria in the <i>Selection</i> fields.</p> <ul style="list-style-type: none"> → Order Line/Invoice – reflects the order number or the invoice number and line number on the order for a product order. → Date – reflects the date of the order or invoice. → Cust # – reflects the customer number. → Customer Name – reflects the business name located on the customer record. → NRA – reflects the order type; New, Repeat or Add. → PL – reflects the product line for this order or invoice → Price – reflects the retail price located on the customer’s order. → Referral Total – reflects the total dollars for a specific referral. → Zip Code Total – reflects the total dollars for a specific zip code
11	<p>To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.</p> <p>Click on the option to select it.</p> 
12	Press the ESC key to exit completely out of reports.



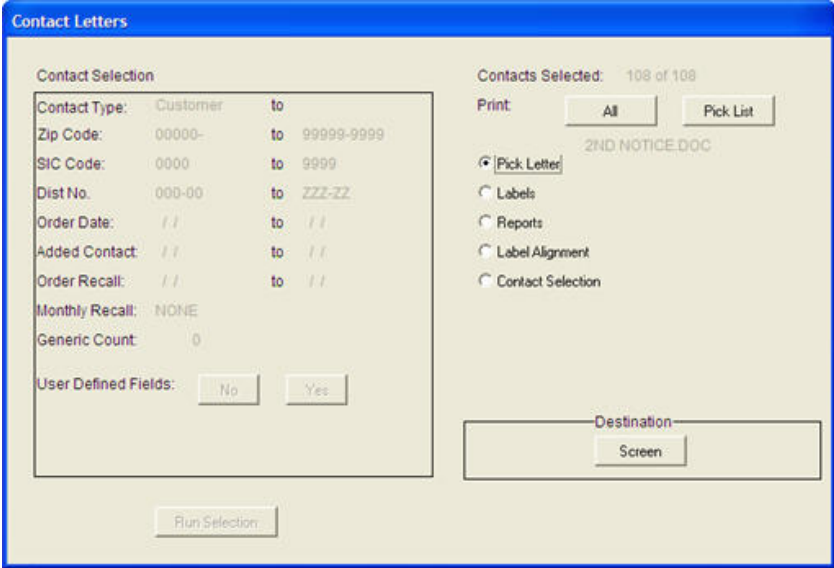
Letters

Letters

Before using the Letters Report options, you should be familiar with how to use the letter Database as described in the Letter Database module.

To increase sales and customer satisfaction by producing and mailing a variety of letters, recall reminders, postcards, quotes or other mailings to contacts. Use the existing CMS Letter Database letters or create your own.

The following instructions represent the report that is generated.

Step	Action
1	Navigate to Letters from the Reports menu in CMS by clicking on the Sub-menu title Marketing.
2	Click the Letters link.
3	<p>The Letters Report Screen will appear:</p>  <p>Select the report option based on the report you would like to generate.</p>

Continued on next page



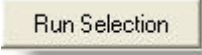
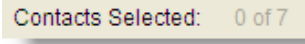

Letters, cont.

Step	Action
3, cont.	<p>Contact Selection:</p> <ul style="list-style-type: none"> ➤ All - Lists information for all customer types in the CMS database. ➤ Customer – Lists information for only the “customer” type in the CMS database. ➤ Prospect – Lists information for only the “prospects” type in the CMS database. ➤ Referral – Lists information for only the “referrals” type in the CMS database. ➤ Individual – Lists information for only one specific individual. ➤ Generic – No contacts are used
4	Once you have selected the appropriate contact type, Tab through and Select the additional fields based on the options presented.
5	<p>Selection: These fields relate to the “Customer” type output – check the CMS Manual for additional field descriptions.</p> <ul style="list-style-type: none"> ➤ Zip Code – Enter the zip code range ➤ SIC Code – Enter the SIC code range ➤ Dist No. - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers. ➤ Order Date – Enter the Order Date range you would like to show on the report. ➤ Added Contact – Enter the date a contact was added to CMS ➤ Order Recall – Enter an order recall date ➤ Monthly Recall – Enter a monthly recall date ➤ Generic Count – Enter the number of generic letters you would like to generate ➤ User Defined Fields – Default is NO, click in the radio button next to YES if you would like to use the User Defined Fields option. When selecting YES, a pop-up will appear giving you additional options. <ul style="list-style-type: none"> — Click the edit button — Click the drop-down next to choice #1 and select either Title of Item. [NOTE: Title will reflect ALL items listed for that Title, Item will allow you to select just one.] Repeat this step for additional choices.

Continued on next page

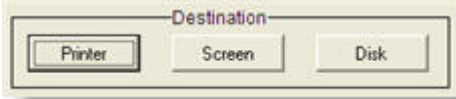
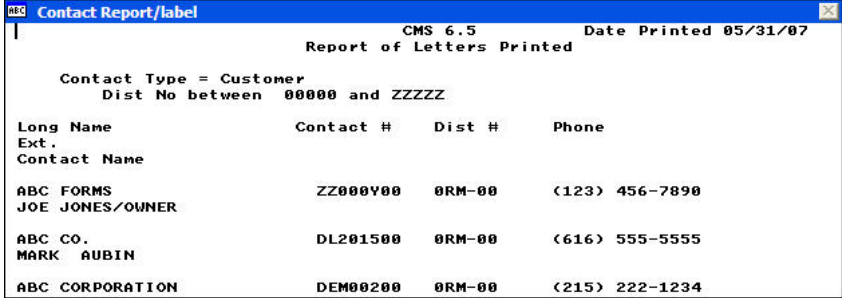


Letters, cont.

Step	Action
6	<p>Run Selection:</p>  <p>Click the Run Selection button to continue.</p> <p>You will then see a contact selected count:</p> 
7	<p>Print: Click the appropriate button based on the desired outcome and the contact selection count.</p> <ul style="list-style-type: none">➤ All – creates a letter for ALL of the contacts.➤ Pick List – allows you to select only the contacts you want to generate a letter for.<ul style="list-style-type: none">— Using the mouse, click on ALL of the names you want a letter created for.— Press the F10 button to accept the list of contacts.
8	<p>Output:</p>  <p>Select the option for the desired output.</p> <ul style="list-style-type: none">➤ Pick Letter – use this option to select from a list of available letters in your CMS letter database.➤ Labels – use this option to generate a label for mailing. Select either Bill To or Ship To.➤ Reports – use this option to generate a report.➤ Label Alignment – use this option to test alignment of labels prior to printing➤ Contact Selection – allows you to start the contact selection over.

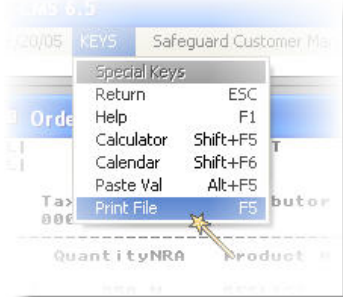
Continued on next page

Letters, cont.

Step	Action																
9	<p>Destination:</p>  <ul style="list-style-type: none"> ➤ Printer - Sends the report straight to the Printer. ➤ Screen - Allows you to view the report on Screen. ➤ Disk - Allows you to create a .txt version of the report. <ul style="list-style-type: none"> — You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels. — A Select File Name pop-up box will appear. — Type the name and press Enter. 																
9	<p>This is a sample of the Letters Report:</p>  <table border="1"> <thead> <tr> <th>Long Name Ext. Contact Name</th> <th>Contact #</th> <th>Dist #</th> <th>Phone</th> </tr> </thead> <tbody> <tr> <td>ABC FORMS JOE JONES/OWNER</td> <td>ZZ000Y00</td> <td>0RM-00</td> <td>(123) 456-7890</td> </tr> <tr> <td>ABC CO. MARK AUBIN</td> <td>DL201500</td> <td>0RM-00</td> <td>(616) 555-5555</td> </tr> <tr> <td>ABC CORPORATION</td> <td>DEM00200</td> <td>0RM-00</td> <td>(215) 222-1234</td> </tr> </tbody> </table>	Long Name Ext. Contact Name	Contact #	Dist #	Phone	ABC FORMS JOE JONES/OWNER	ZZ000Y00	0RM-00	(123) 456-7890	ABC CO. MARK AUBIN	DL201500	0RM-00	(616) 555-5555	ABC CORPORATION	DEM00200	0RM-00	(215) 222-1234
Long Name Ext. Contact Name	Contact #	Dist #	Phone														
ABC FORMS JOE JONES/OWNER	ZZ000Y00	0RM-00	(123) 456-7890														
ABC CO. MARK AUBIN	DL201500	0RM-00	(616) 555-5555														
ABC CORPORATION	DEM00200	0RM-00	(215) 222-1234														
10	<p>Field Descriptions: These fields relate to the “Customer” type report output – check the CMS Manual for additional field descriptions.</p> <p>The fields at the top of the report refer to the previously selected criteria in the <i>Selection</i> fields.</p> <ul style="list-style-type: none"> ➔ Long Name – reflects the business name ➔ Contact # - reflects the customer # ➔ Dist # - reflects the distributor # associated with this customer ➔ Phone – reflects the customer’s phone number ➔ Ext. – reflects a phone number extension if available ➔ Contact Name – reflects the contact name on record for the customer 																

Continued on next page

Letters, cont.

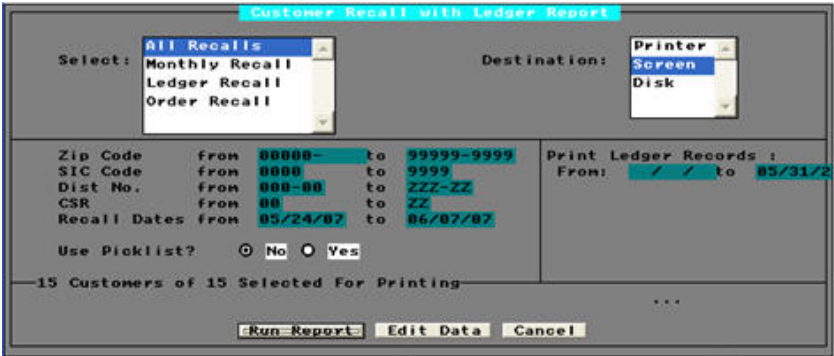
Step	Action
11	<p>To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.</p> <p>Click on the option to select it.</p> 
12	Press the ESC key to exit completely out of reports.



Cust Recall with Ledger

Cust Recall with Ledger

The Customer Recall with Ledger Report provides a complete record of the customer that can be used for field work or telemarketing. The report is generated based on the existence of order, ledger or monthly recall data in the selected ranges. You can select the date range for order history that you want to print on the ledger.

Step	Action
1	Navigate to Cust Recall with Ledger from the Reports menu in CMS by clicking on the Sub-menu title Marketing.
2	Click the Cust Recall with Ledger link.
3	The Cust Recall with Ledger Report Screen will appear: 


Select the report option based on the report you would like to generate.

- **All Recalls**- Generates a printed ledger for customers with ANY type of recall in the specified ranges
- **Monthly Recall** – Generates a printed ledger for customers marked to be recalled in the Monthly Recall field on the contact screen in the selected month(s)
- **Ledger Recall** – Generates a printed ledger for customers with recall dates in messages on the ledger screen in the selected ranges
- **Order Recall** – Generates a printed ledger for customers with recall dates on order line items in the selected ranges

Continued on next page




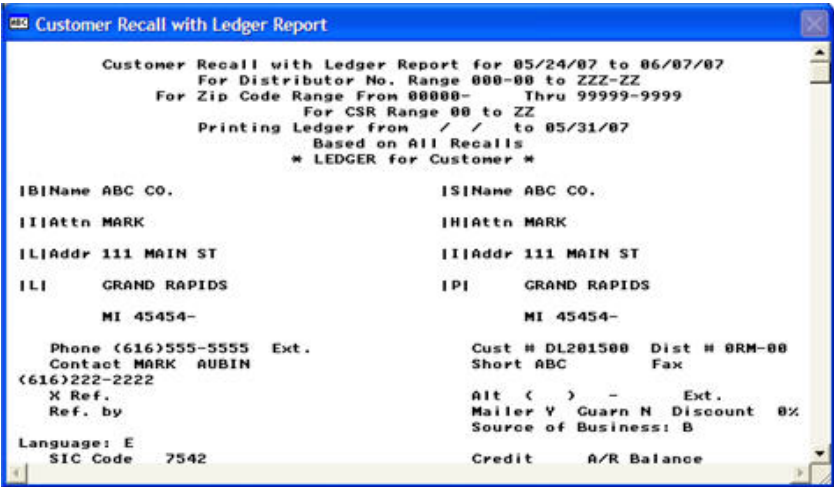
Cust Recall with Ledger, cont.

Step	Action
4	Once you have selected the appropriate report option, Tab through and Select the additional fields based on the options presented.
5	<p>Destination:</p>  <ul style="list-style-type: none">➤ Printer - Sends the report straight to the Printer.➤ Screen - Allows you to view the report on Screen.➤ Disk - Allows you to create a .txt version of the report.<ul style="list-style-type: none">— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.— A Select File Name pop-up box will appear.— Type the name and press Enter.
6	<p>Selection: These fields relate to the All Recalls output – check the CMS Manual for additional field descriptions.</p> <ul style="list-style-type: none">➤ Zip Code from: to: – Enter the zip code range➤ SIC Code from: to: – Enter the SIC code range➤ Dist No. from: to: - Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers.➤ CSR from: to: - Enter the CSR range you would like to show on the report.➤ Recall Dates from: to: – Enter the Recall Date range you would like to show on the report.➤ Use Picklist – NO or YES, Use the YES option to select specific customers for the report. Default is NO.<ul style="list-style-type: none">— Enter the Date Range in the Print Ledger Records field and press Enter to continue— Using the mouse, click on the customers you want to include— Press the F10 key to continue— Skip to step # 8

Continued on next page



Cust Recall with Ledger, cont.

Step	Action
7	Print Ledger Records: Enter the date range for the desired output.
8	Run Report:  Click the Run Report button.
9	This is a sample of the Cust Recall with Ledger Report: 
10	Field Descriptions: These fields relate to the All Recalls report output – check the CMS Manual for additional field descriptions. The fields at the top of the report refer to the previously selected criteria in the <i>Selection</i> fields. <ul style="list-style-type: none"> → Bill Name, Attn, Addr – reflects the business bill to name, attention to and address located on the customer record. → Ship Name, Attn, Addr – reflects the business ship to name, attention to and address located on the customer record. → Phone – reflects the customer’s phone number → Ext. – reflects a phone number extension if available → Cust # - reflects the customer #

Continued on next page



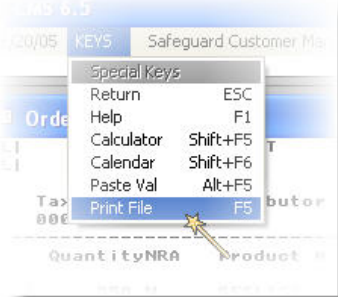
Cust Recall with Ledger, cont.

Step	Action
10, cont.	<p>Field Descriptions, cont:</p> <ul style="list-style-type: none"> → Dist # - reflects the distributor # associated with this customer → Contact - reflects the contact name on record for the customer → Short - reflects the customer's short name → Fax - reflects the fax number → X Ref - reflects a cross reference name [when applicable] located on the customer record → Alt. - reflects and alternate phone number → Ext. - reflects the extension for the alternate phone number → Ref. by - reflects the referred by name [when applicable] locate don the customer record → Mailer - reflects the status of the ARR field on the customer record → Guarantee - reflects the information located in the guarantee field on the customer record → Discount - reflects any across-the-board discount given on the customer's record → Source of Business - reflects the means by which they became a customer → Language - reflects the language selected for invoicing and packing slips → SIC Code - reflects the SIC code selected for this customer → Credit - reflects the credit status for this customer → A/R Balance - reflects the A/R status for this customer → Employees - reflects the number of employees → Tax City - reflects the code associated with the customer's city → Tax County - reflects the code associated with the customer's county → Tax Exempt - reflects the exempt status of the customer → Tax ID Number - reflects the ID number associated with this customer → YTD Sales - reflects the year-to-date sales associated with this customer → Prior Year - reflects the prior year-to-date sales associated for this customer

Continued on next page



Cust Recall with Ledger, cont.

Step	Action
10, cont.	<p>Field Descriptions, cont:</p> <ul style="list-style-type: none">→ Remarks – reflects any remarks enter on the customer record→ Reason for Recall – reflects the type of recall associated with this customer. This section is based on the date range previously selected→ Customer Ledger – reflects any information located on the customer ledger screen.
11	<p>To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.</p> <p>Click on the option to select it.</p> 
12	Press the ESC key to exit completely out of reports.