



Customer Templates



The Need

Successful distribution starts with successful selling. This means having immediately available all of the information that can help to maximize sales and ensure that the customer gets the product they need at the right price.

The Solution

This module has been produced with these objectives in mind.

Key Features:

- **Template generation**

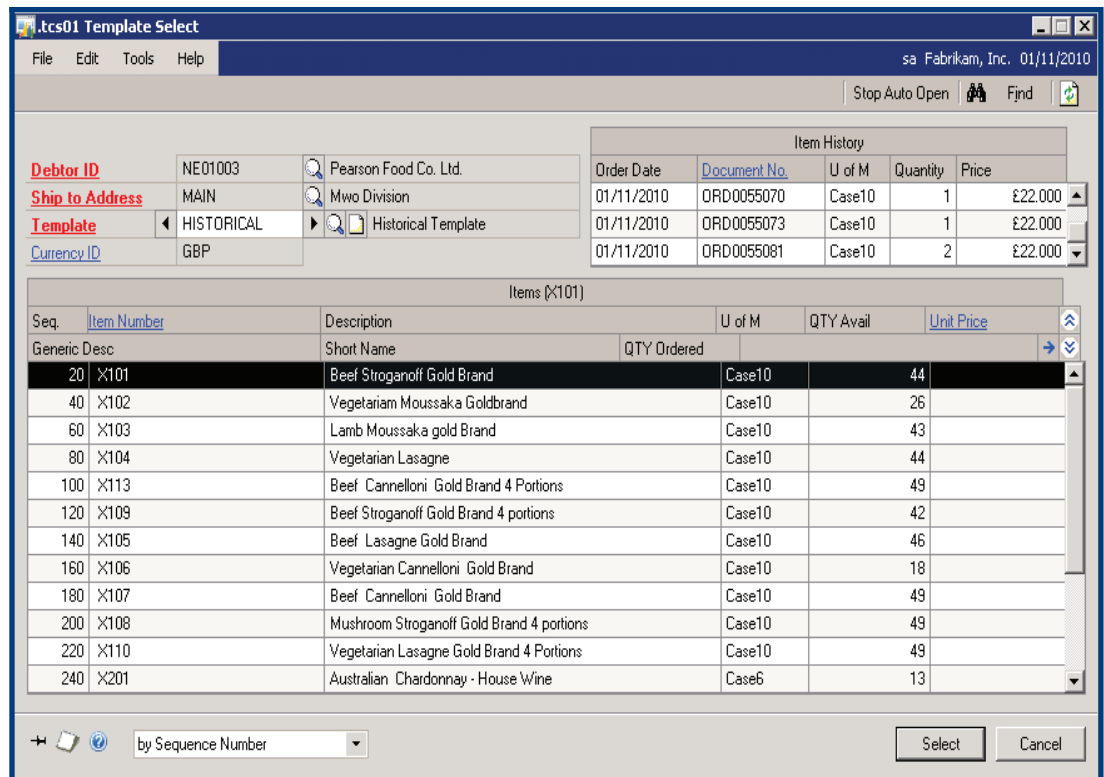
Easy generation of a number of templates or 'product lists' can be attached to one or more customers.

- **Previous order templates**

Through sales transaction entry, automatic generation and maintenance of specific historical templates, customer purchase patterns are recorded.

- **Template selling**

Direct access to one or more templates during order entry to use as a selling prompt or as a checking mechanism.



Order Date	Document No.	U of M	Quantity	Price
01/11/2010	ORD0055070	Case10	1	£22.000
01/11/2010	ORD0055073	Case10	1	£22.000
01/11/2010	ORD0055081	Case10	2	£22.000

Seq	Item Number	Description	U of M	QTY Avail	Unit Price
20	X101	Beef Stroganoff Gold Brand	Case10	44	
40	X102	Vegetarian Moussaka Goldbrand	Case10	26	
60	X103	Lamb Moussaka gold Brand	Case10	43	
80	X104	Vegetarian Lasagne	Case10	44	
100	X113	Beef Cannelloni Gold Brand 4 Portions	Case10	49	
120	X109	Beef Stroganoff Gold Brand 4 portions	Case10	42	
140	X105	Beef Lasagne Gold Brand	Case10	46	
160	X106	Vegetarian Cannelloni Gold Brand	Case10	18	
180	X107	Beef Cannelloni Gold Brand	Case10	49	
200	X108	Mushroom Stroganoff Gold Brand 4 portions	Case10	49	
220	X110	Vegetarian Lasagne Gold Brand 4 Portions	Case10	49	
240	X201	Australian Chardonnay - House Wine	Case6	13	

- Drill down

Drill down to a complete list of previous orders for each individual product showing price and quantity purchased. Additional drill down to show the document containing a particular individual order line.

- Reports and administration

Customer template reports and full housekeeping and purge facilities.

- Restricted sales templates

Limited agreements enables the user to mark a customer record as 'restricted', so that the customer can only purchase items on that template.

What It Means For You

The flexible design of the software demonstrates that it has the ability to meet a wide variety of user needs.

- Selling up

Identify those products that may have been missed by the customer but which are normally ordered.

- Early problem identification

Identify those products that the customer appears to have stopped buying for no known reason.

- Selling to price contact

Create templates for products with contract price.

- Price negotiation

See the prices your customer has paid previously and understand them in the context of the orders of which they formed a part.

- Spares and accessories lists

Pull together any collection of products that have a logical connection. Ensure the correct spares are sold for the right product. Easily identify any uncharacteristic repeat failures of component spares.

- Customer buying lists

Templates can be sequenced to reflect customers' buying behavior – possibly based on their own product codes or a personalized order form.

- Promotions

Bring together all special promotional deals in one template for ease of reference during telesales.



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