



InterAcct
SOFTWARE PTY LTD

InterAcct for Marketing

Highlights :

- ✓ Designed to increase the number of qualified sales leads.
- ✓ Fully integrated system from first recording a new sales enquiry, to estimating, quoting, win/loss analysis, purchasing, invoicing, and all the other accounting processes.
- ✓ Post Promotional Analysis allows you to determine what source of lead is providing the most profit.
- ✓ Can monitor the trends of incoming leads by Industry, Region, & Business Potential.
- ✓ Create personalised direct mail campaigns – targeted selected Clients/Prospects.
- ✓ Telemarketing system to process ‘raw’ names into Prospects.
- ✓ Database “Mining” allows you to interrogate sales invoices to see what products are selling, by whom, to whom.
- ✓ Analyse the reasons why sales are won or lost
- ✓ A fully integrated system provides powerful search and analysis possibilities.

The screenshot displays the InterAcct software interface. At the top, there is a menu bar with options: File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help. Below the menu bar is a toolbar with various icons for navigation and actions.

The main window is titled "InterAcct Demo - [BUSINESS NAMES DATABASE - display]". It contains a form for a client profile. The form is divided into several sections:

- Title:** Mr, **Type:** Business, **Record Id:** CORENTMD
- 1st Name:** Trevor, **Dear ?:** Trev, **1st Added:** 21-Sep-2004
- Surname:** Jones, **Last Date:** 25-Sep-2009
- Position:** General Manager, **Next Date:** 24-Apr-2009
- Business:** Corporate Enterprises Pty Ltd, **Last Inv:** 3-Feb-2010

Below this, there are fields for contact information and address:

- Ph Area:** 02, **Address:** 3/556 Andrews Road
- Bus Ph:** 9995 3322, **Cnr:** Wetherill Street
- Fax No:** 9995 6778, **Suburb:** MOSMAN, **NSW P/C:** 2088
- Mobile:** 0413 556 776, **Country:** [blank], **Region:** FRED.S
- After Hrs:** [blank]

Further down, there are fields for status and financial information:

- Status:** CLIENT, **Branch:** HO, **Corp Group:** 1.NONE
- Category:** CASH-DEP, **A/c Mgr:** PAUL.H, **Overdue \$:** 0.00
- Origin:** WEBSITE, **Cust Type:** BLD.CARPEN, **Balance \$:** 7,704.15

At the bottom of the form, there are fields for email and web site:

- Email:** trev@corpent.com.au
- Web Site:** www.corpent.com.au
- Comment:** Branches in Brisbane & Melbourne

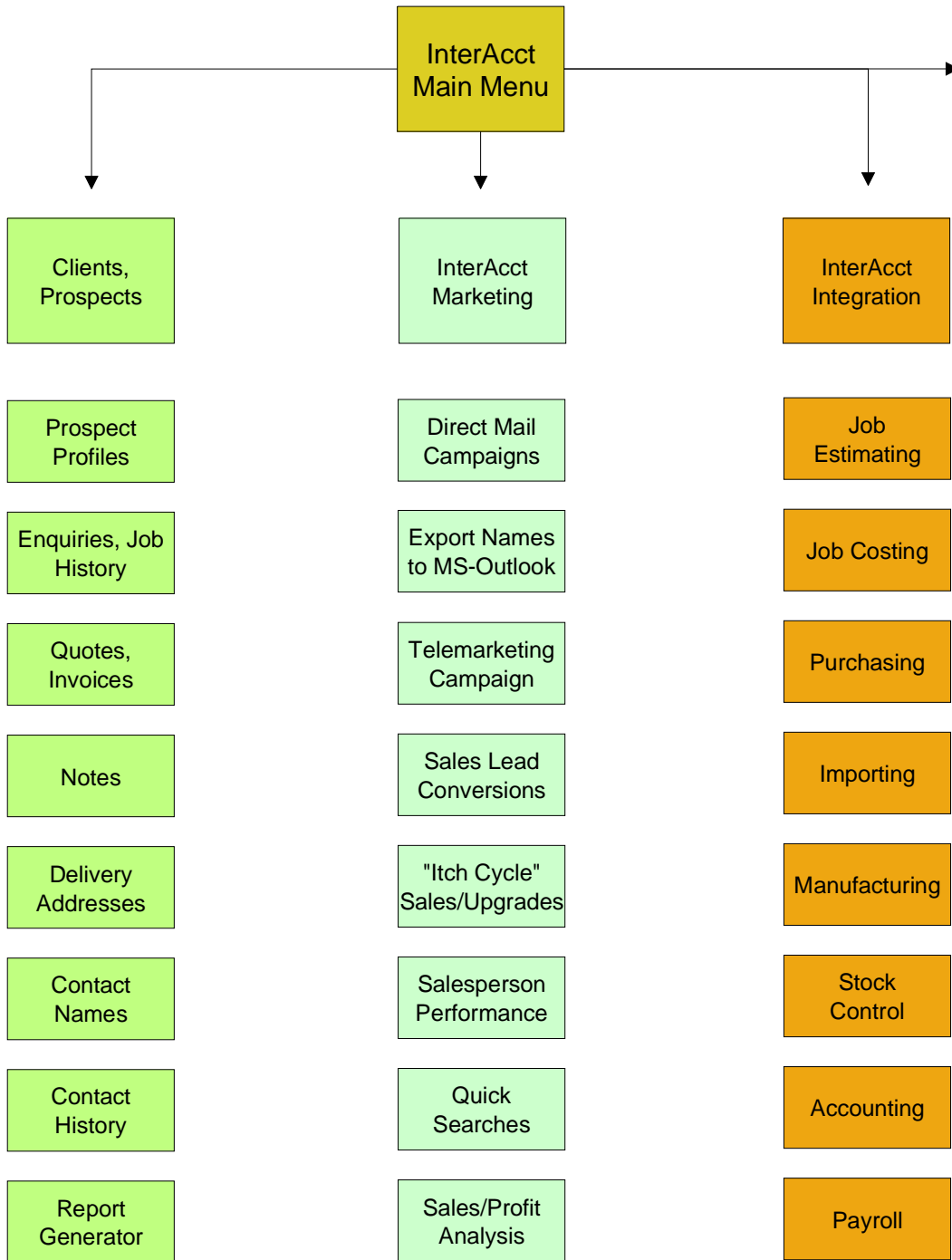
On the right side of the interface, there is a "Menu" section with a list of options:

1. Contact Names
2. Notes File
3. Delivery Addresses
4. Client/Prospect Profile
5. Contact History
6. EMails Sent/Received
7. Client Jobs, Enquiries
8. Input Quotes/Invoices
9. View : Sales Orders
10. Standing Sales Order
11. Sales/Profit Analysis
12. Product Purchase History
13. Document Register
14. Service/Maintenance
15. Debtor's Totals
16. Debtor's Ledger
17. Debtor's Info
18. Debt Collection
19. Aged Debtor Analysis
20. Debtor Reports
21. Create Report Designs

Below the menu, there are four icons: Google Map, Directions, Manual, and Video.

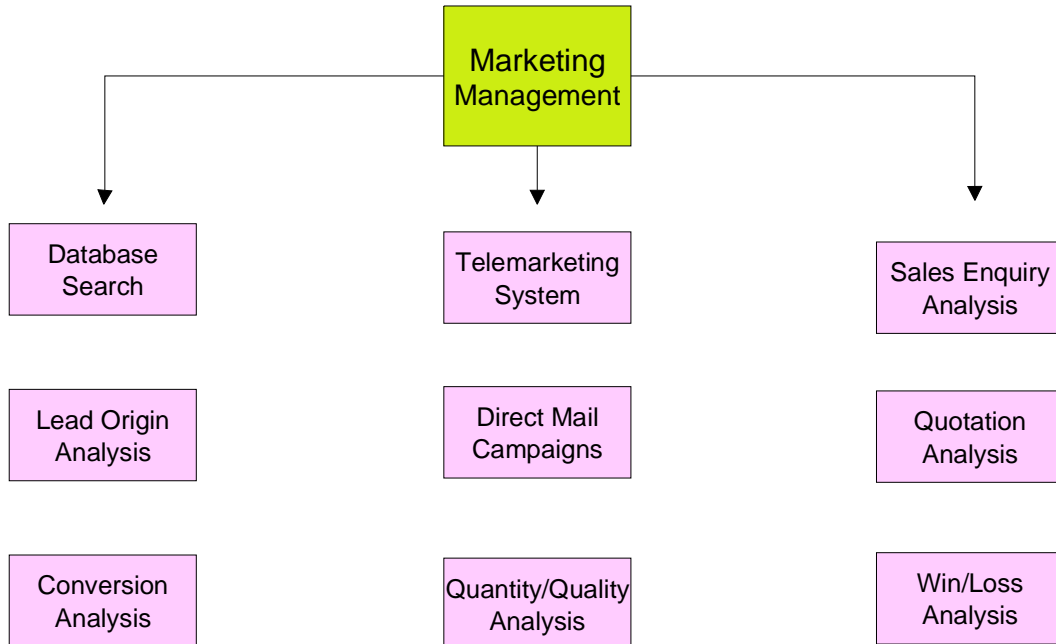
At the bottom of the interface, there is a table titled "CONTACT NAMES list, Corporate Enterprises Pty Ltd, Trevor Jo". The table has the following columns: Contact Name, Title/Position, Direct Ph, Mobile Ph, Birthday, and Comments.

| Contact Name | Title/Position | Direct Ph | Mobile Ph | Birthday | Comments |
|------------------|--------------------|-----------|--------------|----------|----------------|
| 1 Trevor Jones | General Manager | 99956788 | 0413 556 776 | 5-Oct-55 | DECISION MAKER |
| 2 Nancy Freidman | Accountant | | | | RECOMMENDER |
| 3 Ken Basworth | Sales Manager | | 0413 556 778 | | SUPPORTER |
| 4 Patsy Winters | Purchasing Officer | 99952344 | 0412 334 554 | | BREAKER |



Software Features :

- ✓ Record all Prospects & Clients on a central Database
- ✓ A Prospect record can be classified by Salesperson, Status, Category, Origin, and optionally by Branch, Region, Business Potential, and Corporate Group.
- ✓ A monthly summary is maintained of incoming sales enquiries by lead origin (quantity & value).
- ✓ Conversion analysis shows (by month) enquiries converted into quotes, and into sales.
- ✓ Prospect Profiles allow you to define 'sets' of questions (by Industry?) that are typically asked of Prospects. You can then search across all answers given for selected text – to identify latent business opportunities.
- ✓ You can record what Products/Services a "Prospect" currently uses, or have used previously, and what products they need in the future. Follow up dates can be added to prompt an "Itch Cycle" possible purchase/upgrade opportunity.
- ✓ The Telemarketing system allows you to import 'raw' Suspect names to be telemarketed – and then track the results to calls made.
- ✓ One "Prospect" can have multiple Contact Names.
- ✓ Each Contact Name can have free format notes attached, plus by linked to "Mail Flags". These mail flags are another way to select names for a direct Mail Campaign.
- ✓ You can search & locate a Prospect record by knowing Surname, First Name, Phone Number, Email Address, Post Code, or just by entering any part of the Business Name.
- ✓ Product Purchase History is maintained by Customer, by Location.
- ✓ Monthly summary of Sales & Gross Profit by Customer.
- ✓ Calling Route Plan by Region, by Salesperson
- ✓ Salesperson Contact History can be analysed by a Prospect's Rating, Industry to see what is the most effective mix of activities.
- ✓ Quotations sent can be analysed by Origin, Industry, Salesperson, and show due close dates and probability.
- ✓ A documents register of MS-Word documents, pdf files, photos, CAD Drawings, etc can be linked to a Client – with a 'click' to open to up.
- ✓ You can also send one-off personalised letters directly from the database – updating the Prospect's Contact History log automatically.
- ✓ Can go to any file and search across multiple fields, and multiple values to locate matching records.
- ✓ Report Generator is easy to configure reports.
- ✓ Flexible software design – add/remove fields, files, menus to suit.



InterAcct Demo - [MARKETING MANAGEMENT - display]

File Record Edit View Go Advanced Menu Graph Design Help

Names Daily Alerts Quotes/Invoices Sales Orders Jobs Database

Search for... Business Names Phone Numbers Surnames Email Addresses First Names By Post Code Manual Video

| Menu | | |
|---------------------------|--------------------------------|-----------------------------|
| Getting Started : | | |
| 1. Prospect Categories | 16. Telemarketing | 29. Prospect Profile |
| 2. Other Categories | 17. Employee Targets | 30. Prospect's Products |
| 3. Client Categories | 18. Daily Performance | 31. Names by Mail Flag |
| 4. Customer Types | | 32. Birthday Reminders |
| 5. Routes/Regions | Search & Analysis : | 33. Quotation Register |
| 6. Employees | 19. Daily Activities | 34. Documents Database |
| 7. Salespersons | 20. Activity Summary | 35. Property Database |
| 8. Sales Activities | 21. Task Schedule | 36. Sales Analysis |
| 9. Event Activities | 22. Post Promotional Analysis | 37. Delivery Schedule |
| 10. Report Templates | 23. Lost Business Analysis | 38. Employee Sales Analysis |
| 11. Mail Flags | 24. Day Book Log | 39. Letter Writer Menu |
| | 25. Names - Date/Origin | 40. Follow Up, Re-Orders |
| 12. Prospect's Questions | 26. Route Plan | 41. Exit InterAcct |
| 13. Product Applications | 27. Hot Prospects | |
| 14. Customer's Suppliers | 28. Names by Status | |
| 15. Competitor's Products | | |

Form help Field help Contact-Us Management Finance Payroll Admin Stock Service Factory Reports

Welcome to InterAcct Software - Marketing Management Menu.

For support, please contact - support@interacct.com.au or Fax: (02) 9975 7269

InterAcct Demo - [SALES MANAGEMENT - display]

File Record Edit View Go Advanced Menu Graph Design Help

Clients

Daily Alerts

Quotes/Invoices

Sales Orders

Jobs Database

Menu

| | | |
|---|---|---|
| Getting Started : | | |
| <ul style="list-style-type: none"> 1. Prospect Categories 2. Customer Types 3. Routes/Regions 4. Employees 5. Salespersons 6. Sales Activities 7. Event Activities 8. Sales Sources 9. Report Templates 10. Mail Flags 11. Prospect's Questions 12. Product Applications 13. Customer's Suppliers 14. Competitor's Products | <ul style="list-style-type: none"> 15. Employee Targets 16. Daily Performance Search & Analysis : 17. Daily Activities 18. Activity Summary 19. Task Schedule 20. Day Book Log 21. Names - Date/Origin 22. Route Plan 23. Hot Prospects 24. Names by Status 25. Prospect Profile 26. Prospect's Products 27. Names by Mail Flag 28. Birthday Reminders | <ul style="list-style-type: none"> 29. Quotation Register 30. Documents Database 31. Property Database 32. Sales Analysis 33. Delivery Schedule 34. Employee Sales Analysis 35. Invoice Register 36. Follow Up, Re-Orders 37. Exit InterAcct |

Search for...

Business Names

Phone Numbers

Surnames

Email Addresses

First Names

By Post Code

Manual

Video

Form help | Field help | Contact-Us | Employees | Management | Finance | Payroll | Admin | Stock | Service | Factory | R

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Telemarketing

Menu

- 1. Setup : Telemarketers**
- 2. Setup : Sales Activity Types**
- 3. Setup : Call Result Codes**
- 4. Setup : Telemarketing Activities**
- 5. View : Follow Ups**
- 6. View : Call Summary**
- 7. View : Daily Activities**
- 8. Start : Telemarketing**
- 9. Reports Listing**
- 10. Imported File Conversion**