



**InterAcct**  
SOFTWARE PTY LTD

# InterAcct for Sales Management

## Highlights :

- ✓ Fully integrated system from first recording a new sales enquiry, to estimating, quoting, win/loss analysis, purchasing, invoicing, and all the other accounting processes.
- ✓ Manage Hot Prospects by Salesperson
- ✓ View the quality and quantity of sales activities
- ✓ Monitor the due close dates of quotations
- ✓ Set daily sales \$ and activity targets by salesperson – check variances
- ✓ Prioritise follow ups – check if they are overdue.
- ✓ Improve efficiency of Customer visits by region, call route.
- ✓ Analyse the reasons why sales are won or lost
- ✓ Provide conversion analysis of sales leads by origin/source
- ✓ Quickly convert a Prospect into a Customer – quote to invoice.

InterAcct Demo - [BUSINESS NAMES DATABASE - display , ]

File Record Edit View Go Advanced Menu Graph Design Help

**Title** Mrs      **Type** B Business      **Record Id** TOTALCFR

**1st Name** Jasmine      **Dear ?** Jasmine      **1st Added** 18-Dec-2009

**Surname** Fields      **Last Date**      **Next Date**      **Position** General Manager

**Business** Total Concept Marketing Pty Ltd

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**Ph Area** 02      **Address** Suite 2, 16 Rodborough Road

**Bus Ph** 9947 8866      **Suburb** FRENCHS FOREST NSW P/C 2086

**Fax No** 9947 3321      **Country**      **Region**      **Mobile** 0412 445 008

**After Hrs**      **Status** PROSPECT      **Branch** HO      **Corp Group** 1.NONE

**Category** 1.HOT      **A/c Mgr** MARK.W

**Origin** WEBSITE      **Cust Type** DIRECT-MAIL

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**Email** jfields@totalconcepts.com.au

**Web Site** www.totalconcepts.com.au

**Comment** direct mail house

**Menu**

1. Contact Names
2. Notes File
3. Delivery Addresses
4. Client/Prospect Profile
5. Contact History
6. E-mails Sent/Received
7. Client Jobs, Enquiries
8. Input Quotes/Invoices
9. Standing Sales Order
10. Product Purchase History
11. Document Register
12. Create Report Designs

Form help | Field help | Documents | Jobs | Accounting | Search | Tables | Messages | Suburbs | Reports

This file contains details on your Clients, Prospects, Suppliers, and all other Business Contacts. Select record to view next menu options.

Google Map

Directions

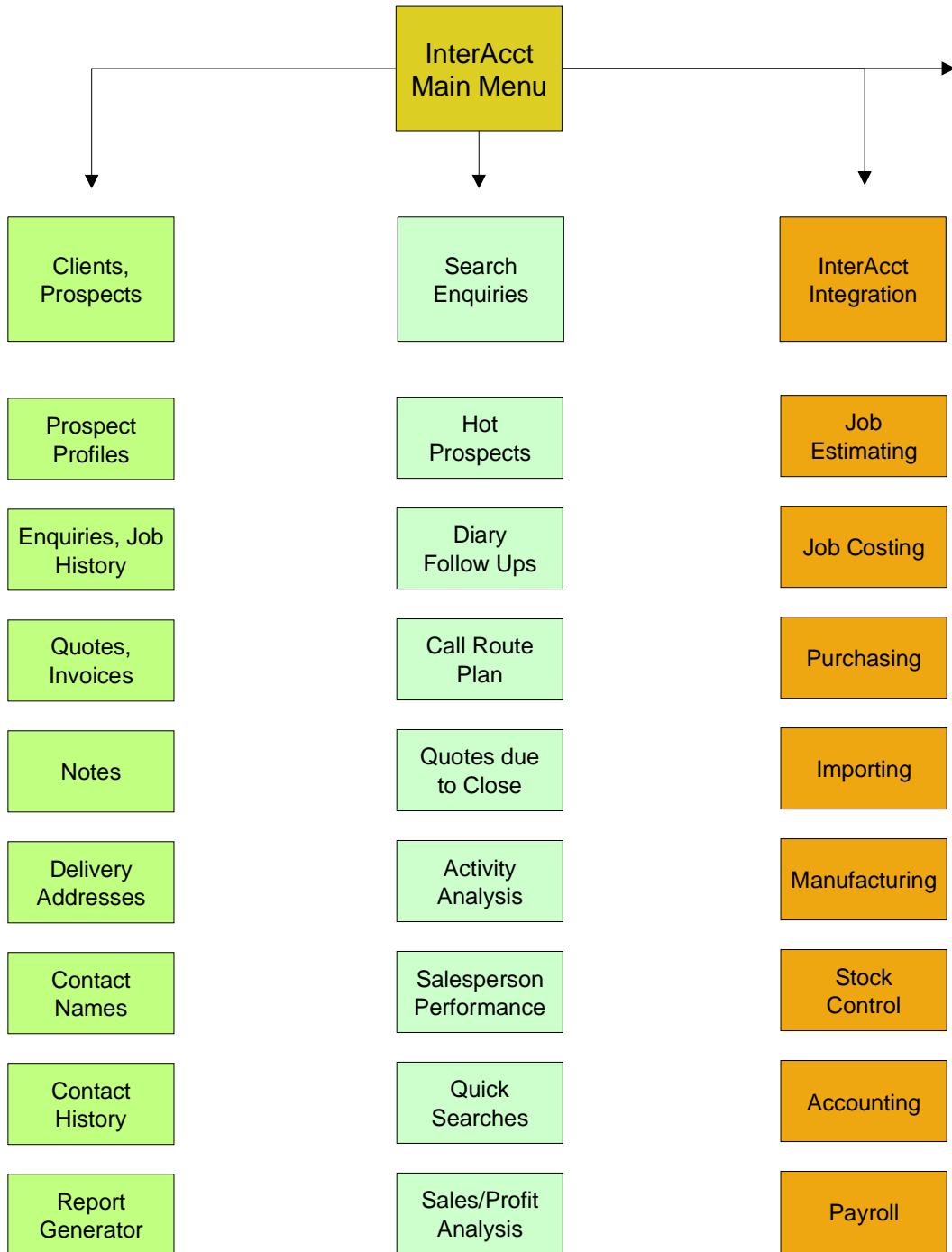
Manual

Video

**CONTACT NAMES list , , Total Concept Marketing Pty Ltd, Jasmine**

File Record Edit View Go Advanced Graph Design Help

	Contact Name	Title/Position	Direct Ph	Mobile Ph	Home Ph	Fax No	Birthday	Comments
1	Jasmine Fields	General Manager						
2	George Groves		9947 5566	0413 557 665				



## 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.
- ✓ One "Prospect" can have multiple Contact Names.
- ✓ Each Contact Name can have free format notes attached, plus by linked to "Mail Flags"
- ✓ One "Prospect" can have multiple Delivery Site Locations.
- ✓ You can 'click' on an address to link into Google Maps – to show directions of how to get there.
- ✓ You can 'click' on an email address to link to MS-Outlook.
- ✓ You can 'click' on a web address to open up MS-Internet Explorer
- ✓ Product Purchase History is maintained by Customer, by Location.
- ✓ Monthly summary of Sales & Gross Profit by Customer.
- ✓ Calling Route Plan by Region, by Salesperson
- ✓ Prospect Profiles allow answers to commonly asked questions to be recorded & searched upon.
- ✓ You can record what Products/Services a "Prospect" currently uses, and what products they need in the future.
- ✓ Contact History can be maintained by Prospect, Employee, and by Activity Type.
- ✓ Salesperson Targets can be compared to actual Performance – both activities, sales, profit.
- ✓ The quotation register shows 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 send Prospects personalised letters directly from the database – updating the Contact History log automatically.
- ✓ Follow up dates update the salesperson diary – prioritised according to the Prospect's Status/Rating.
- ✓ Hot Prospect listings are shown by Salesperson.
- ✓ 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.
- ✓ Can go to any file and search across multiple fields, and multiple values to locate matching records.
- ✓ Can search by a Prospect's birthday (if known).
- ✓ Quotes can be entered, and then converted to a Sales Order/Invoice without re-keying.
- ✓ Report Generator is easy to configure reports.
- ✓ Flexible software design – add/remove fields, files, menus to suit.

**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**

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

[Form help](#) | [Field help](#) | [Contact-Us](#) | [Employees](#) | [Management](#) | [Finance](#) | [Payroll](#) | [Admin](#) | [Stock](#) | [Service](#) | [Factory](#) | [R](#)

Welcome to InterAcct Software - Sales Management Menu.

**InterAcct Demo - [INTERACCT MAIN MENU - display ]**

File Record Edit View Go Advanced Menu Graph Design Help

Licenced Owner

Date    Fri 18-Dec-2009  
 Time    08:55:31

**Company Names**

**Phone Numbers**

**Email Addresses**

**Quote Register**

**Manuals**

**System Design**

**Surnames**

**Work Schedules**

**By Post Code**

**Diary Alerts**

**Videos**

**First Names**

**Task Schedules**

**Fixed Assets**

**Document Register**

**Exit InterAcct**

**Menu**

- 1. Business Names
- 2. Enquiries/Jobs
- 3. Marketing
- 4. Sales Menu
- 5. A/cs Payable
- 6. A/cs Receivable
- 7. Accounting
- 8. General Ledger
- 9. Payroll
- 10. Stock/Materials
- 11. Import Costing
- 12. Jobs Menu
- 13. Service/Maintenance
- 14. Manufacturing
- 15. Management
- 16. Exit InterAcct

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Welcome to the InterAcct Software - Main Menu

For software support, please contact-

support@interacct.com.au    Fax : (02) 9975 7269

