

# SALES PROSPECTING

Platinum sales prospecting is a purpose-designed package used in managing sales prospecting activities. It is a sales aid that can be used either stand-alone or can be integrated with any of, platinum vehicle sales, sales ledger or stock control modules.

## Prospect Maintenance

- Prospect number automatically generated by the computer.
- Details including company name, address, telephone, fax number, contact name, notes and interest categories can be entered.
- Pop up search facility enabling prospects to be found by company name, address, contact name or sales person.
- Brief notes field hold additional contact names and job titles etc.
- Detailed notes: up to 99 pages available, useful for storing directions to prospect and any additional details of the prospect.
- Create new contacts, each time the sales person speaks to the prospect, sends a letter or quotation a new contact is created with the date the contact was made.
- Contact can be viewed at anytime in the future, useful for seeing what was said last time you contacted the prospect.
- Integration with platinum script text editor enables letters to be edited and printed specific to the prospect, can be viewed at a later stage.
- Transfer details to Platinum sales ledger. Once a prospect becomes a customer company details can be automatically transferred to the sales ledger.
- Print prospect details. A full history of each prospect can be printed out showing each and every contact ever made may be created printed and saved
- Quotation layout totally configurable
- Optional link to stock control for pricing information
- Standard quotations may be saved and loaded when required

## Contacts Due

- This option displays all prospects to be contacted on a certain date.
- Contacts can be selected by: sales person, contact type, on or before a certain date or interest category.
- Output can be directed to the screen or printer.
- Displays company name, date of contact, type of contact e.g. telephone, letter etc and telephone number of prospect.
- Full prospect details can be viewed from here enabling past details of conversations to be looked at etc.
- New contact can be created, allows details of today's contact to be entered.
- Automatically prompts next contact date and type to be inputted.
- Built in calendar allows day and date of contact to be selected without having to look in a diary.

## Interest categories

- Each prospect can have a number of interest categories attached to it. This information can be used to display contacts by interest category.
- Interest categories can be added to a prospect from the amendments and contacts due options.
- New interest categories can be added, amended or deleted from this option.
- Report of every interest category can be printed from this option.

## Interest Letters

- Enables letters and labels to be printed out and sent to prospects in a specific interest category.
- Integrates with Platinum Script Editor.
- Creates new contact automatically if required.
- Option to select next contact date once letter has been sent.
- Notes can be entered specific to the letter being sent.

### **Mail shots**

- This option is designed to enable mail shots to be sent out to a number of new prospects quickly and easily.
- Enter new mail shot. Allows company name, address and telephone number to be entered and stored as a database, each group or bank of new prospects can be held under a mail shot reference.
- A duplication check hunts on the telephone number to make sure the same company has not been entered more than once.
- Print mail shot. A mail shot reference is selected with a specific letter enabling letters to be printed with Company address details etc. Once printed contact due date can be set in order to follow up the mail shot with a telephone call.
- Integrates with Platinum Script Editor allowing letters to be created or amended as necessary.

### **Sales Person Maintenance**

- Easy entry of new sales person.
- Sales person can be linked to each prospect.
- Allows prospects to be assigned to a new sales person.
- Prints report on sales personnel in prospect system.

### **Contact type maintenance**

- Easy entry of new contact types, e.g., telephone, letter, quote etc. Prints report on contact types.

### **Quotations**

- Designed to facilitate the printing and storing of quotations issued to a prospect.
- Free type layout, allowing the user to individualise their quotation layout or use existing stationery sets.
- Automatically updates contact on prospect.
- Can be viewed, reprinted or edited at a later date.
- Integrates with the finance option allowing finance details to be displayed on the quotation.
- Optional link to stock control for pricing information
- Standard quotations may be saved and loaded when required
- Optional link to sales ledger to convert a quote into a sales invoice

### **Finance Maintenance**

- This has been designed for companies who offer finance, e.g., lease rental, lease purchase as an option when buying.
- Details of finance terms for a limitless number of finance houses and terms may be stored.
- Instant finance quotations can be obtained giving deposit and repayments over a given term