



Call Management

Automation tools for your sales force help make each individual on your team more productive. And when a sales person is more productive your revenues, cash flow and profits increase. Vertical Market Software's Call Management module provides a complete, comprehensive tool to help your sales team track leads, be reminded when to follow-up needs to take place, and transfer a sale automatically to other VMS modules, such as Accounts Receivable, Order Processing and Service Management.

Some of the benefits of the Call Management module are:

- Each sales person can create or "import" from data base lists, and have numerous types of databases.
- User-specific fields may be added to a prospect/customer record allowing your sales team to tailor the type of information needed.
- Complete prospect information is maintained in the prospect record including, but not limited to, contact and company name and address, work/home/car and fax phone numbers, date of last call, date of follow-up call, status of prospect, notes of meetings / conversation with prospects etc.
- You are able to copy existing Accounts Receivable customer file to Call Management and record notes and/or service site file or create sales promotions to market to your customers.
- Word Processing interface to merge prospects to specific letter types.
- Sales personnel are able to inquire into customer balances, sales history, open sales orders, inventory stock balances, or open purchase orders.
- Report writer included allowing you to create your own special reports.
- Entering next call follow-up date updates each sales persons personal appointment scheduler.
- "Week at a glance" enables each salesperson to quickly scan their schedule for the week.
- Through the accounting interface option the sales team can transfer a prospect to your Accounts Receivable customer file, set up billing transactions in Accounts Receivable, establish a quote in Order Processing, change the quote to an order, establish a service agreement in Service Management, and issue a purchase order.
- When completing service tickets in Service Management, you can automatically schedule a service call reminder notice in Call Management to follow-up on customer satisfaction of services provided.