



Tracker is a CRM add-in for Microsoft Outlook. Microsoft Outlook is one of the most popular e-mail and contact management program in a business environment. However, it lacks the ability to smoothly integrate contacts with tasks and calendar items. In addition, it cannot handle necessary sales and marketing tools such as marketing projects, call reports etc.

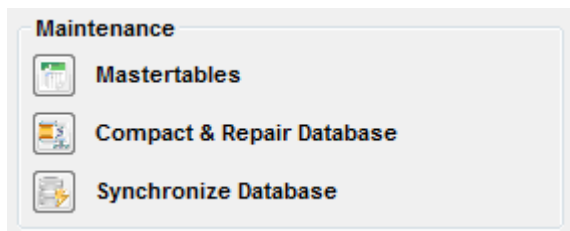
That is where Tracker enhances the features of Outlook, allowing it to be a fully functional customer relationship management program.

This manual illustrates the features of Tracker. Help can be accessed at any time by pressing F1.

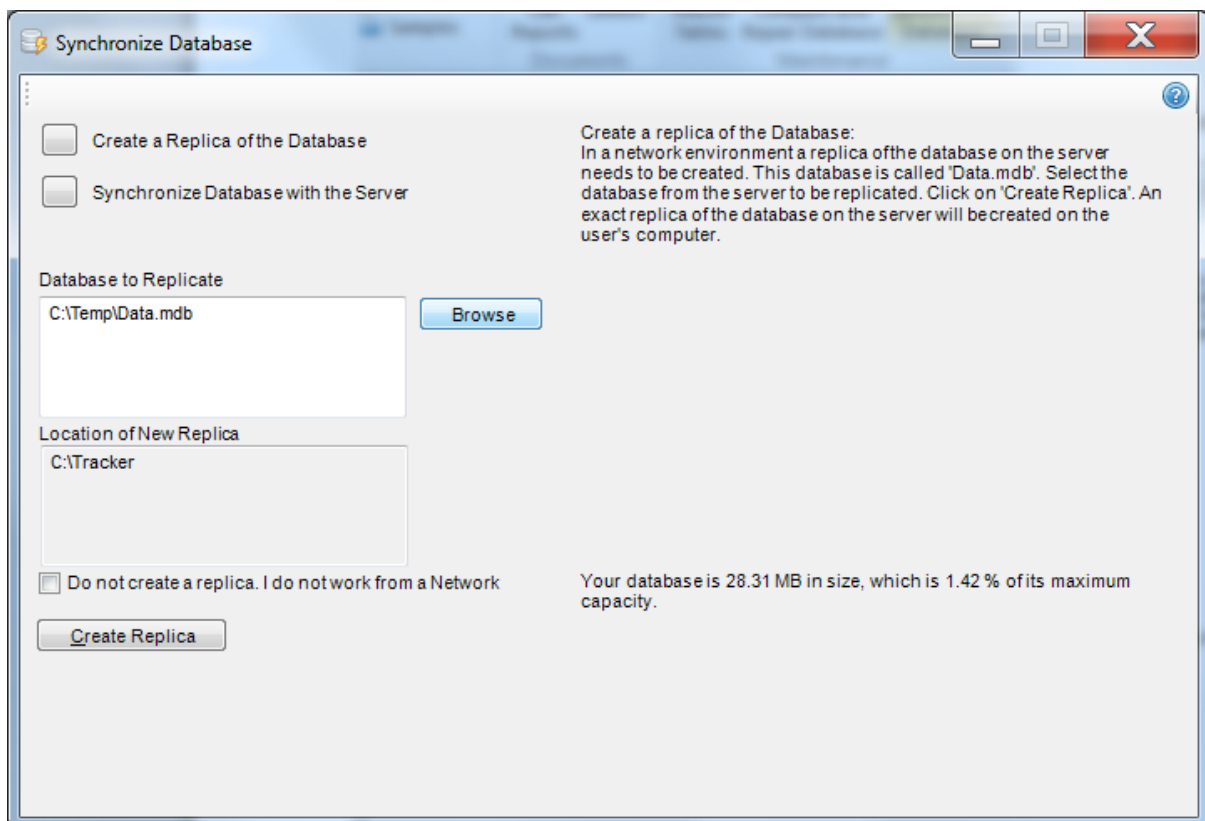
Network Installation

If you are working in an environment where more than one sales person is using Tracker, you would want them all to synchronize the changes made by each individual over a network. Select or create a folder on the network that everybody has access to and copy the file 'Data.mdb' from the user's machine (by default this file would be found under C:\Tracker) to the selected folder on the server.

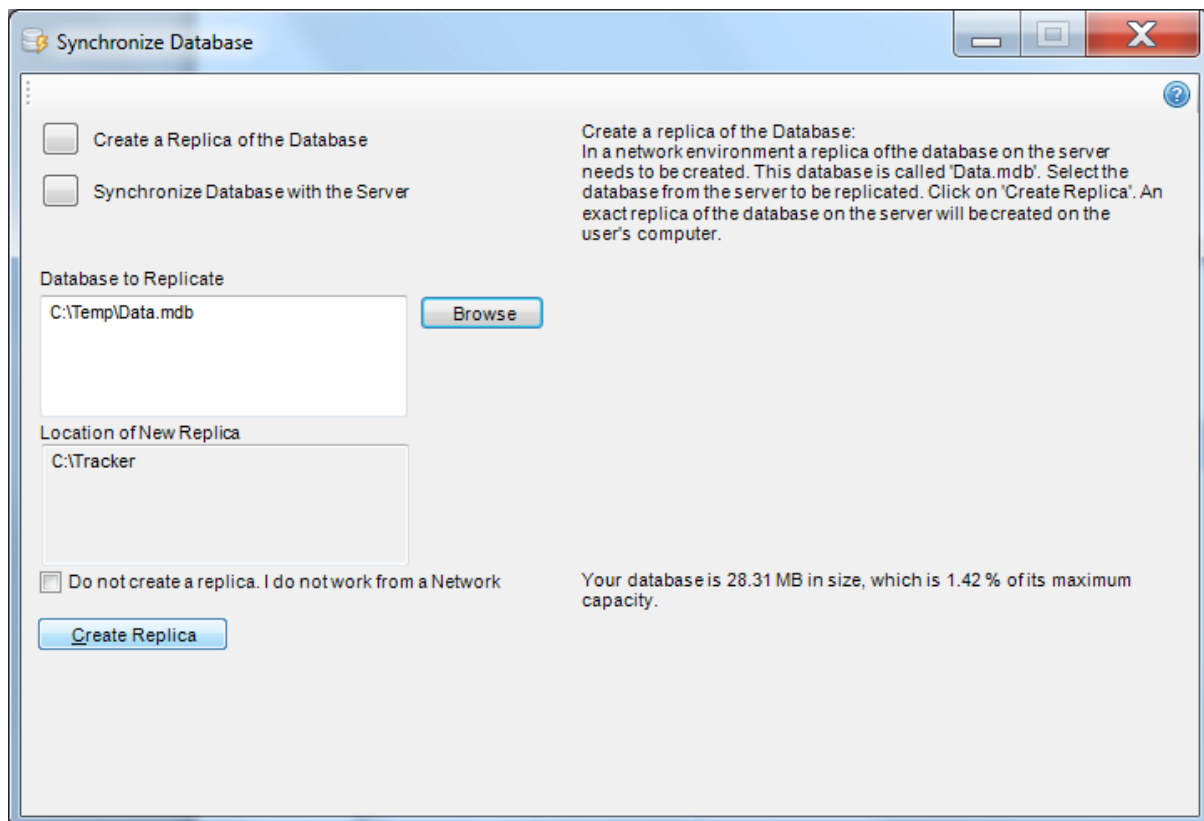
Open Tracker and click on 'Synchronize Database'.



Click on 'Create a Replica of the Database' and click on 'Browse' to locate the database on the server.

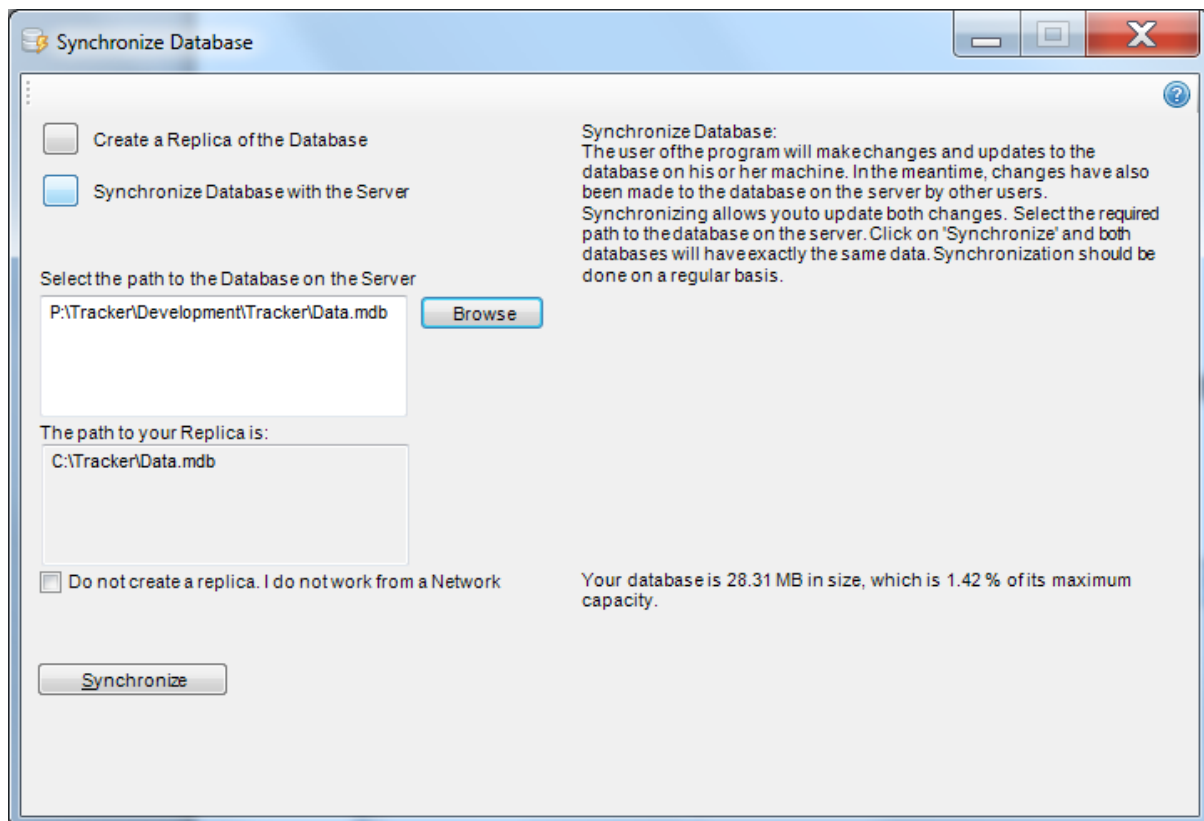


Click on 'Create Replica'.



An exact replica of the database on the server will be created on the client PC.

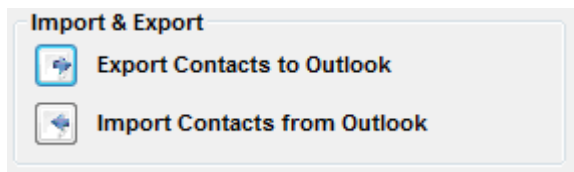
On a regular basis you want to synchronize with the server, ensuring that all changes made by individual workstations are synchronized over the entire network. Open Tracker and click on 'Synchronize Database'. Click on 'Synchronize the Database with the Server'.



Click on 'Synchronize'.

Importing Contacts from Outlook

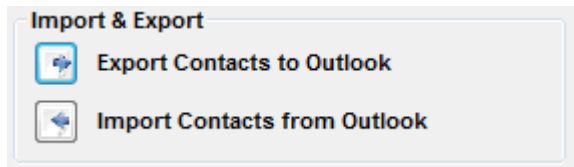
You might want to import contacts from MS-Outlook to the tracker Database.



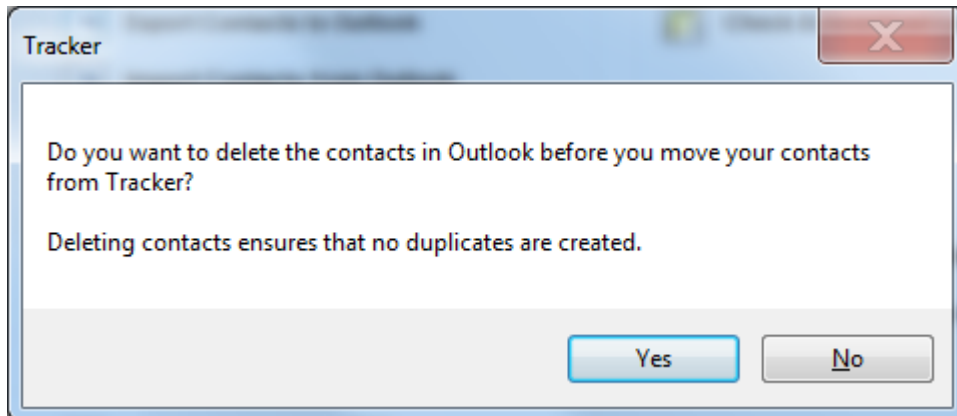
Click on 'Import Contacts from Outlook'. All Outlook contacts will be imported into the Tracker database.

Exporting Contacts to Outlook

You might want to export your contacts generated in the Tracker database to MS-Outlook Contacts.



Click on 'Export Contacts to Outlook'.



It is advisable to first delete your contacts in Outlook to avoid duplicating contacts.

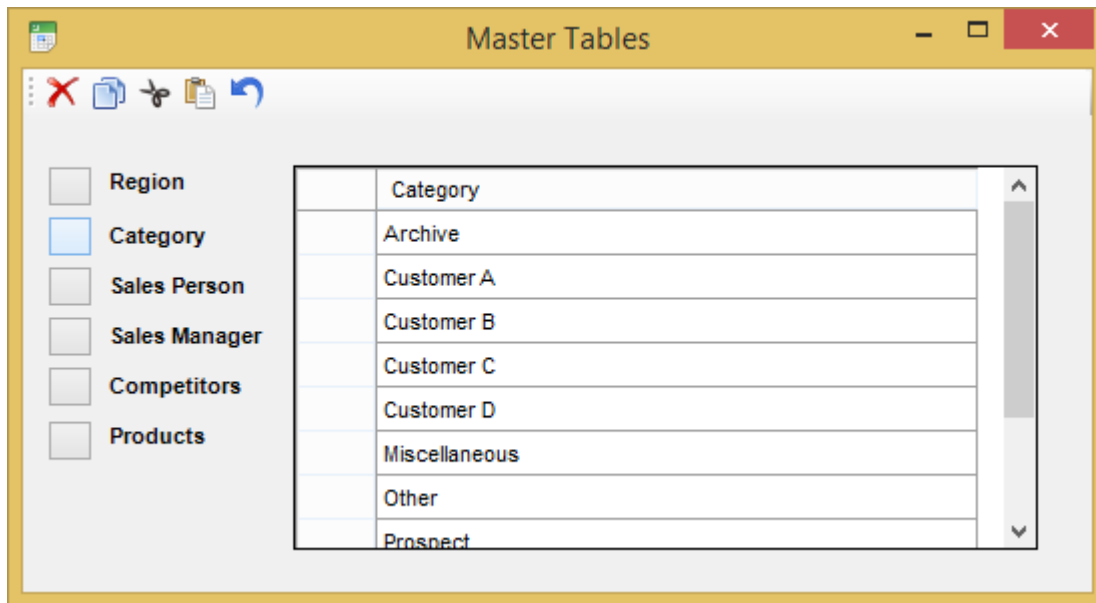
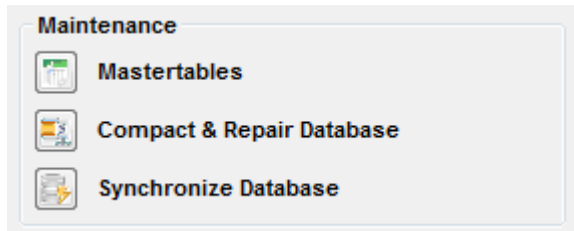
Help

Anytime you need Help you can select or highlight the item you need help with and press F1 or click on the 'Help' icon.



Master Tables

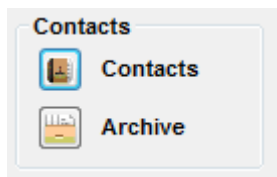
Tracker has a lot of drop-down boxes. These are used to select rather than enter data. This enforces uniformity.



For example you determine which entries can be selected under the drop-down box for 'Category'.

Contacts

Contacts is what you will be working with most of the time.



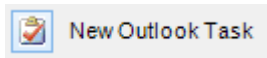
To use the example of Master Tables, a Category is limited in the information entered into Master Tables.

A screenshot of the Outlook 'Contacts' window. The window title is 'Contacts'. It features a toolbar with navigation and action icons. Below the toolbar, there are search boxes for 'SEARCH COMPANY...' and 'SEARCH CONTACT...'. The main form contains fields for 'Company' (ABE Construction Chemicals), 'Title' (Mr.), 'First Name' (Bill), 'Last Name' (Gilchrist), and 'Job Title' (Technical). Below these are tabs for 'Location', 'Telephone', 'Internet', and 'Miscellaneous'. The 'Miscellaneous' tab is active, showing a 'Category' dropdown menu with options: Archive, Customer A, Customer B (selected), Customer C, Customer D, Miscellaneous, Other, Prospect, Reseller, and Supplier. Other fields in this tab include 'Account', 'Assistant's Name', 'Assistant's Phone', 'Sales Person', 'Sales Manager', 'Meeting Frequency', 'Notes', 'Hobbies', 'Keywords', and a date field '13/08/2015'. To the right of the form are two panels: 'Options' with icons for 'New Outlook Task', 'New Outlook Appointment', 'Call Reports', 'Write E-Mail', 'Projects', 'Samples Issued', 'Letters', 'Market Info', and 'Customer Complaints'; and 'Outlook Items' with icons for 'Inbox', 'Sent Items', 'Deleted Items', 'Calendar', and 'Tasks'.

If your business relationship with a contact has come to an end, instead of deleting this contact rather move it to the archive by changing its category to 'Archive'.

New Outlook Task

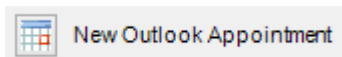
A number of activities can be generated e.g. 'New Outlook Task'.



The screenshot shows the Outlook 'Task' form for a task titled 'Warren Delaney ABE Construction Chemicals 011-30...'. The ribbon includes 'File', 'Task', 'Insert', 'Format Text', and 'Review'. The 'Task' ribbon has groups for 'Actions' (Save & Close, Delete, Forward, OneNote), 'Show' (a dropdown), 'Manage Task' (Mark Complete, Assign Task, Send Status Report), 'Recurrence' (Recurrence), 'Tags' (a dropdown), 'Zoom' (Zoom), and 'Start Inking' (Start Inking). The form content shows 'Due today.' at the top, followed by a yellow bar for 'Customer B'. The 'Subject' field contains 'Warren Delaney ABE Construction Chemicals 011-3069000 072-6245368'. Below this are fields for 'Start date' (None), 'Status' (Not Started), 'Due date' (Wed 17/12/2014), 'Priority' (Normal), and '% Complete' (0%). At the bottom, there is a 'Reminder' checkbox, a 'Reminder' field (None), a 'Sound' dropdown (None), and an 'Owner' field (Martin Poortvliet).

Task details such as contact details and company are automatically captured. All you have to do is change the due date and save it in Outlook.

New Outlook Appointment



The screenshot shows the 'Appointment' window in Microsoft Outlook. The title bar reads 'Johnathan Parker Technical Finishes...'. The ribbon includes 'File', 'Appointment', 'Insert', 'Format Text', and 'Review'. The 'Appointment' tab is active, showing options like 'Scheduling Assistant', 'Invite Attendees', 'Options', 'Tags', 'Zoom', and 'Start Inking'. The main form area is titled 'Prospect' and contains the following fields:

- Subject:** Johnathan Parker Technical Finishes 011 822 7242
- Location:** 35 Activia Road Germiston
- Start time:** Wed 17/12/2014, 12:00
- End time:** 13:00
- All day event:** ☐

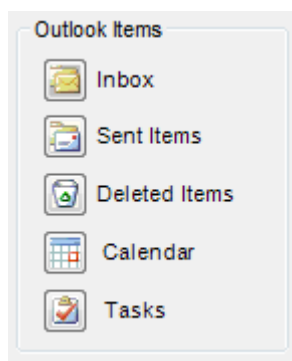
A calendar pop-up for December 2014 is visible, showing the date 17 highlighted. The calendar grid is as follows:

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

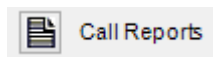
Appointment details such as address and telephone number are automatically captured. All you have to do is change the date and time and save it in Outlook.

Outlook Items

You can easily keep track of e-mails, tasks and appointment items related to a contact in Tracker.



Call Reports



Writing a call report can be done in a few simple steps. Click on 'New'

A screenshot of a web application window titled 'Call Reports Related to Altis Biologics'. The window has a yellow header bar. Below the header is a toolbar with various icons: a list icon, a search icon, a document icon, a red X icon, a magnifying glass icon, a document with a checkmark icon, a document with a plus icon, a document with a minus icon, and a document with a checkmark icon. A 'New' button is highlighted with a blue border. Below the toolbar is a large white area with the text 'Click 'New' to add a Call Report' and a '+' icon. At the bottom of the window is a section labeled 'Action Required' with a text input field.

Select the 'Method of Contact'.

Call Reports Related to Altis Biologics

1 OF 1

SEARCH...

Select the Method of Contact

- Correspondence
- Delivery
- Meeting
- Telephone Call
- Other

+

-

Action Required

Select the Date and Time and click 'OK'.

Call Reports Related to Altis Biologics

1 OF 1

SEARCH...

Select the Method of Contact

- Correspondence
- Delivery
- Meeting
- Telephone Call
- Other

Select the Date and Time

17/12/2014

10:00

OK

Action Required

You can set a reminder in MS-Outlook as to when you need to when a meeting should be scheduled next.

Reminder

Do you want to set a Reminder in MS-Outlook, advising you when you are due for a Meeting again?

Yes No

This is based on the 'Meeting Frequency' (in days) you have set in 'Contacts'

Meeting Frequency		Last Meeting Date	13/08/2015
Notes			

The reminder will be set 2 days before a meeting is due and will be set for the following Monday if this date falls on a weekend.

Now all you have to do is fill out the details. Thereafter you can print mail or send the report to MS-Word.

Call Reports Related to Altis Biologics

1 OF 1

SEARCH...

CALL REPORT

Company: Altis Biologics
Category: Customer D
Sales Person: Martin Poortvliet
Person Contacted: Nicolaas Duneas (CEO)
Method of Contact: Meeting
Date and Time: 17/12/2014 10:00

Details:

Action Required

Actions can be assigned to any other members of your organization. This is useful if call reports are mailed to them. A complete list of all call reports with actions can be displayed from the main menu. Here actions can also be deleted once attended to.



You can search for key phrases in call reports. For example search for 'CHEM'. Any call report related to this particular company with the phrase 'CHEM' will be selected with the phrase highlighted.

Call Reports Related to Ezeetile

9 OF 9

CHEM

Sales Person: Martin Poortvliet
 Person Contacted: Cecil Goncalves (Technical Manager)
 Method of Contact: Meeting
 Date and Time: 12/07/2011 12:30

Details:

EVA Dispersions:

DA-102 has been approved as an alternative to a styrene acrylic dispersion in a 2-k tile adhesive. Cecil will be ordering 3 FCLs (Durban Cape Town and PE) on an ex-wharf basis. The usage will be one FCL per region every 2 months. Cecil needs an updated ex-wharf price based on 30 days after statement as well as based on cash in advance. I suggest that we make a GP of 15%.

DA-104 was tested against Mowital 6481 but it did not yield the same flexibility.

Cecil is interested in replacing his styrene acrylic with an EVA. Currently, he is paying R18.00 per kg for a 51% solids styrene acrylic.

EVA Powders:

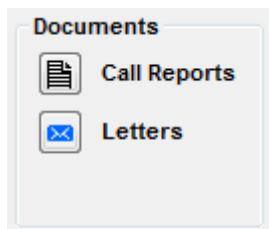
The sample of Dairen DA-1400 is being tested by a laboratory in Germany. It will be used in a new type of tile adhesive. Cecil needs an updated price on direct indent, based on standard payment terms as well as cash in advance.

Defoamers:

Ezeetile uses 60 kg per month of powdered defoamers from Chemimpo per month. They pay between R42 and R43.00.

Action Required

All call reports from the entire database can be accessed from the main menu.



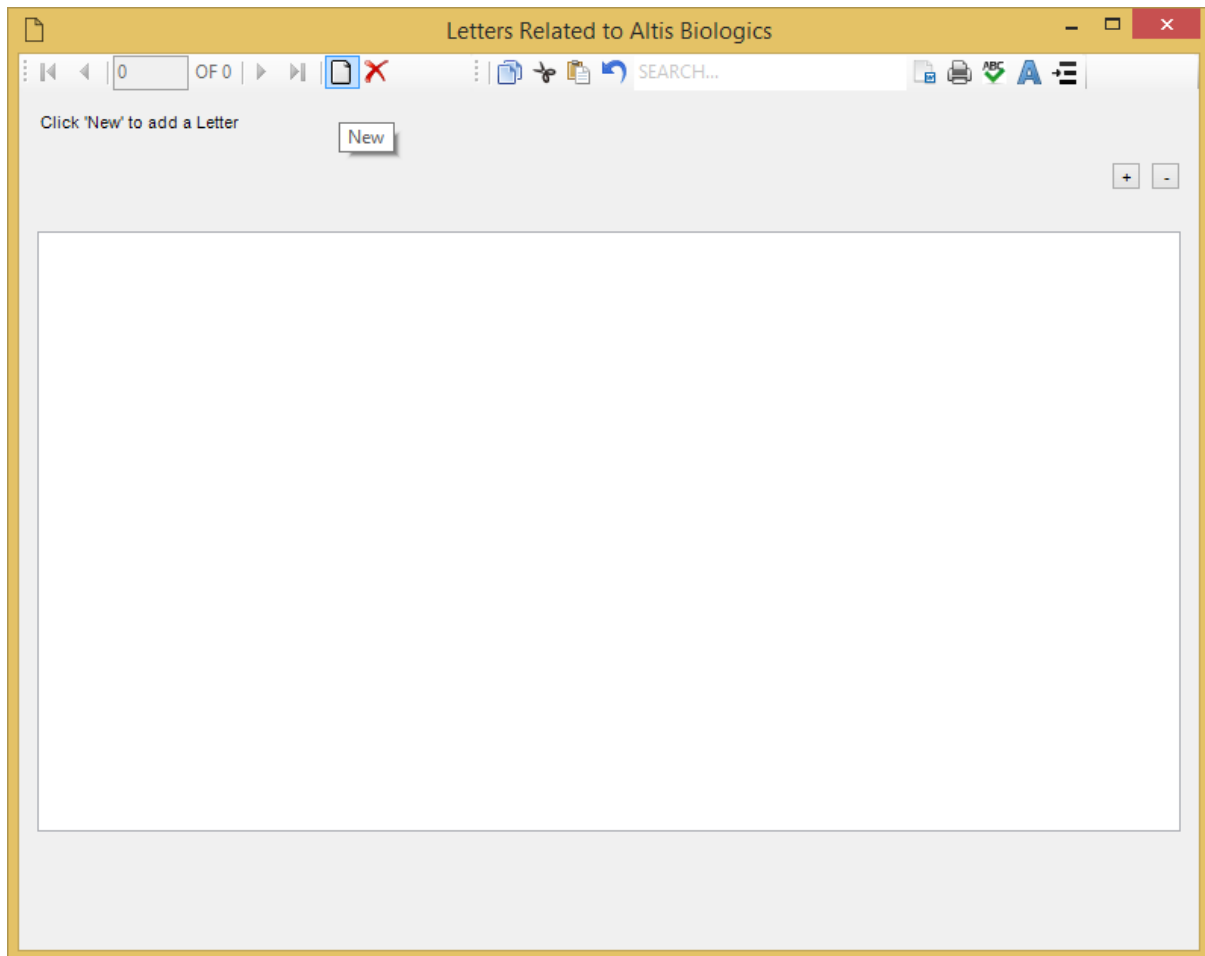
You can then search for key phrases in all call reports. For example search for 'CHEM'. Any call report with the phrase 'CHEM' will be selected with the phrase highlighted.

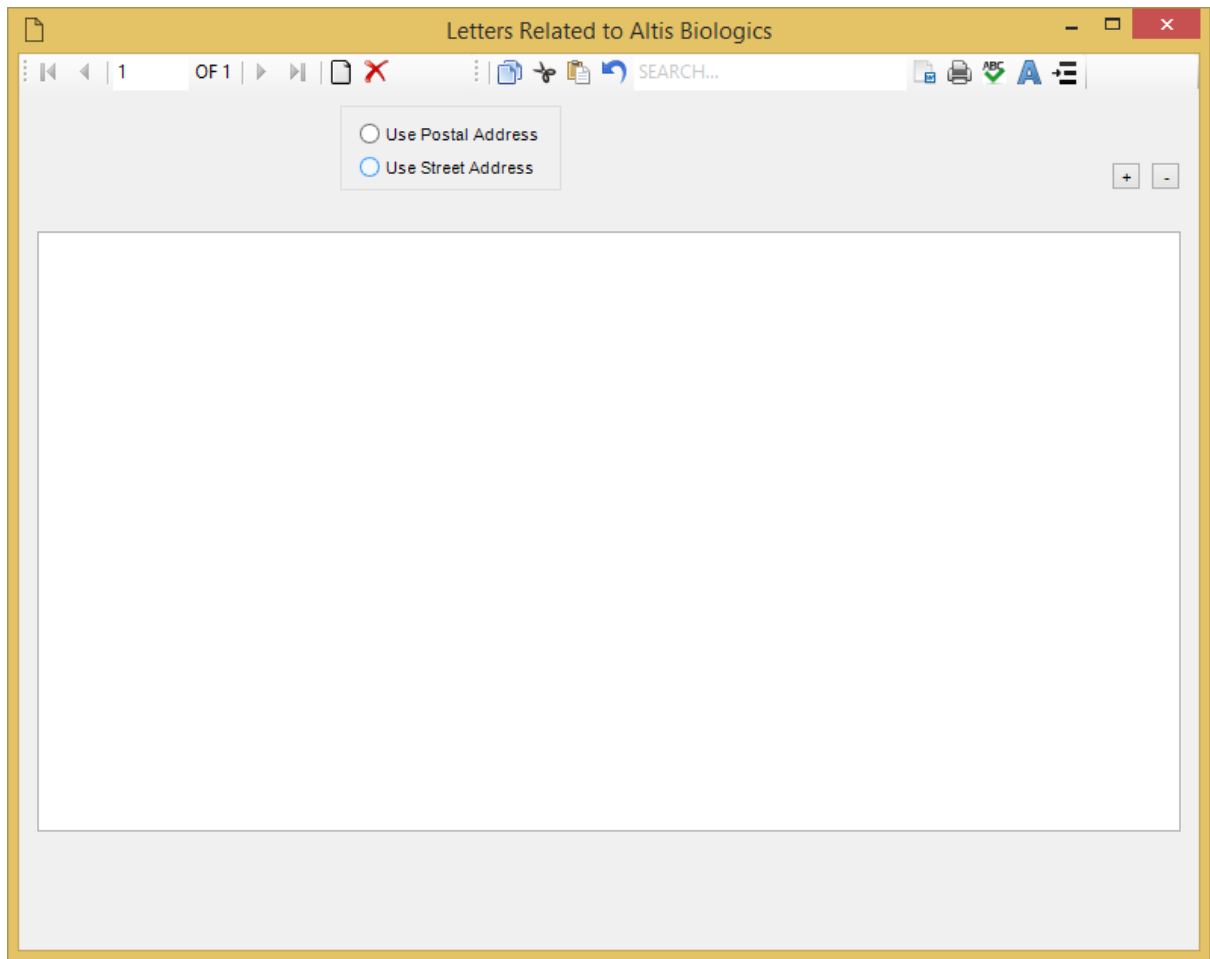
Letters

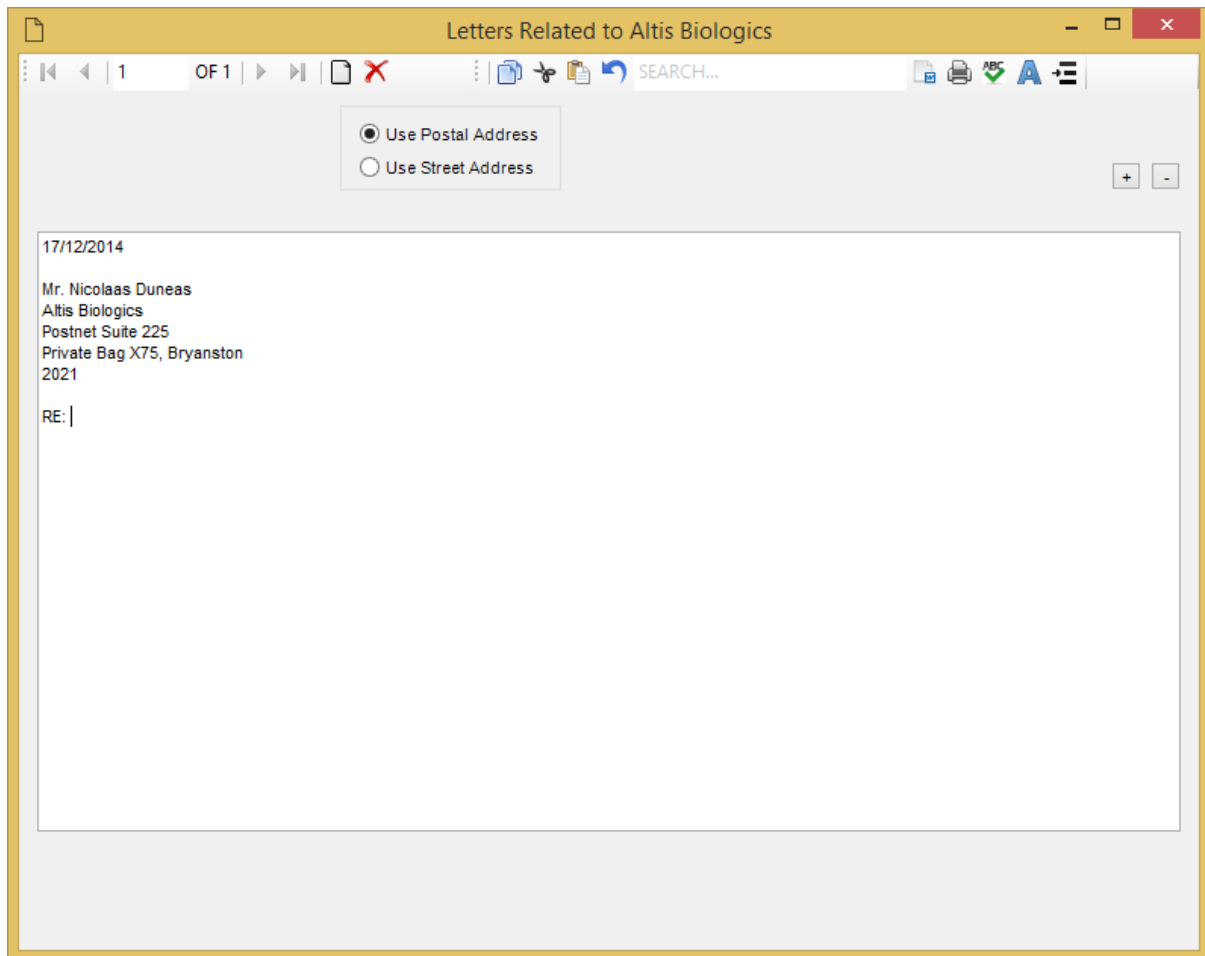


Although not a full word processor, simple letters can be written to contacts in a similar fashion to writing call reports. You need your letterhead added to the file Letterhead.doc, which is located in the folder C:\Tracker.

Click on 'New' and select whether the postal or street address should be used.

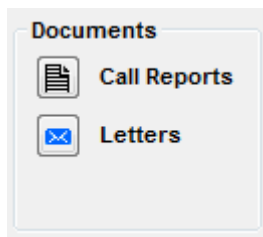






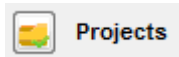
You can search for key phrases in letters. For example search for 'CHEM'. Any letter related to this particular company with the phrase 'CHEM' will be selected with the phrase highlighted.

All letters can be accessed from the main menu.



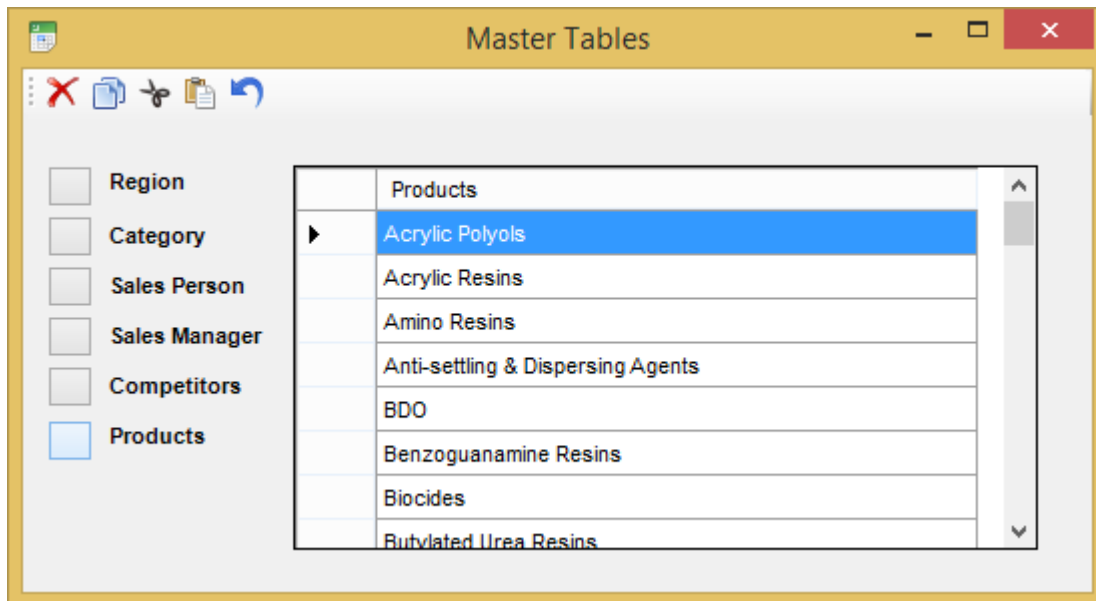
You can then search for key phrases in all letters. For example search for 'CHEM'. Any letter with the phrase 'CHEM' will be selected with the phrase highlighted.

Projects



Projects can be anything related to a company but are usually a summary of action steps in order to get the business.

You can select an existing name for a project. These names should be set in Master Tables under 'Products'.



Click on 'New'

Projects Related to Altis Biologics

Click 'New' to add a Project

Project Name

Project Status

Project Application

Project Date

Category

Potential Volume % Probability ☐ Real Value per Annum

Potential Value % Gross Profit ☐ Real GP per Annum

Select a Project

Go To

- Active Projects
- Cancelled Projects
- Completed Projects

Change Project Status

- Active Project
- Cancelled Project
- Completed Project

Calculate

Action Steps

Click 'New' to add an Action Step

Date

Contact

Action

Follow Up

Follow Up on

☐ Follow Up all Projects

Select a product from the drop-down list.

Projects Related to Altis Biologics

1 OF 1

Project Name:

Project Status: Active Project

Project Application:

Project Date: 01/02/2015

Category: Customer D

Potential Volume: % Probability ☐ Real Value per Annum

Potential Value: % Gross Profit ☐ Real GP per Annum

Go To: Active Projects, Cancelled Projects, Completed Projects

Calculate

Select a Project

Action Steps

0 OF 0

Click 'New' to add an Action Step

Date: 01 February 2015

Contact:

Action:

Follow Up

01/02/2015

Follow Up on:

Follow Up all Projects

Acrylic Polyols
Acrylic Resins
Amino Resins
Anti-settling & Dispersin
BDO
Benzoguanamine Resin
Biocides
Butylated Urea Resins
Cellulose Ethers
Cellulose Replacement
Chemipol Décor
Chemipol P60
Chemipol UV
Chlorinated Polyolefin
Corn Starch
Defoamers
Dimethyl Carbonate
Epoxy Resins
EVA Dispersions
EVA Resins
EVOH
Fluorescent and Metall
Fumed Silica
H/C Resins
MDI
Melamine Resins
Mineral Thickeners
N/C Chips
Paraformaldehyde
PBT

Click on 'New' under 'Action Steps'

Projects Related to Altis Biologics

1 OF 1

Select a New Project

BDO

Project Name: BDO

Project Status: Active Project

Project Application:

Project Date: 01/02/2015

Category: Customer D

Select a Project: BDO

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Calculate

Potential Volume: % Probability: Real Value per Annum:

Potential Value: % Gross Profit: Real GP per Annum:

Action Steps

0 OF 0

Date: 01 February 2015

Contact: New

Action:

Follow Up

01/02/2015

Follow Up on BDO

Follow Up all Projects

Projects Related to Altis Biologics

1 OF1 Select a New Project BDO

Project Name: BDO
 Project Status: Active Project
 Project Application:
 Project Date: 01/02/2015
 Category: Customer D

Select a Project: BDO

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Calculate

Potential Volume: % Probability: Real Value per Annum:
 Potential Value: % Gross Profit: Real GP per Annum:

Action Steps

1 OF1

Date: 01 February 2015

Contact: Nicolaas Duneas

Action:

Follow Up

01/02/2015 Follow Up on BDO Follow Up all Projects

Once a project has been completed, you can assign the project to 'Completed Project'. If the project was cancelled, change it to 'Cancelled Project'.

You can print a summary of all projects with action steps related to a particular company.

Projects Related to Altis Biologics

1 OF1 Select a New Project BDO

Project Name: BDO
 Project Status: Cancelled Project
 Project Application:
 Project Date: 01/02/2015
 Category: Customer D

Select a Project: BDO

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Calculate

Potential Volume: % Probability: Real Value per Annum:
 Potential Value: % Gross Profit: Real GP per Annum:

Action Steps

1 OF1

Date: 01 February 2015

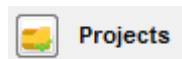
Contact: Nicolaas Duneas

Action:

Follow Up

01/02/2015 Follow Up on BDO Follow Up all Projects

A summary of all projects can be obtained from the main menu and can be analysed in MS-Excel.



Projects											
Analyze in MS-Excel	Category	Potential	Value	Probability %	GP %	Real Value	Real GP	Project	Project Date	Project Status	Action Date
Altis Biologics	Customer D							BDO	17/12/2014	Active Project	17/12/2014
BASF Elastogran	Prospect	2200000						MDI	25/11/2014	Active Project	12/12/2014
BASF Elastogran	Prospect	66000						Polyether Amine	25/11/2014	Active Project	12/12/2014
BNG Packing & T...	Customer C							Potato Starches	09/03/2012	Active Project	12/12/2014
Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project	12/12/2014
Multi Constructio...	Customer C	6000						EVA Powders	31/03/2011	Cancelled Project	12/12/2014
Royal Adhesives...	Customer B	110	R 4 400.00	100	20	R 4 400.00	R 880.00	Defoamers	13/08/2014	Active Project	12/12/2014
Royal Adhesives...	Customer B							Hardlen CY	21/02/2013	Active Project	12/12/2014
Tyl-Pro Adhesive...	Customer A	11000						Cellulose Replac...	13/01/2014	Active Project	12/12/2014
Ezeetile	Customer A							Anti-settling & Di...	20/08/2014	Active Project	11/12/2014
Ezeetile	Customer A	250000	R 95 000 000.00	50	3	R 47 500 000.00	R 1 425 000.00	Cellulose Ethers	17/07/2014	Active Project	11/12/2014
Ezeetile	Customer A	150000	4200000	50	18	2100000	378000	Cellulose Replac...	03/02/2014	Active Project	11/12/2014
Ezeetile	Customer A	700	R 34 650.00	90	15	R 31 185.00	R 4 677.75	Defoamers	29/05/2014	Active Project	11/12/2014
Ezeetile	Customer A	40000						Potato Starches	05/09/2014	Active Project	11/12/2014
Tyl-Pro Adhesive...	Customer A							Epoxy Resins	09/07/2014	Active Project	11/12/2014
BASF Elastogran	Prospect							Polyurea	25/11/2014	Active Project	10/12/2014
BNG Packing & T...	Customer C							H/C Resins	09/09/2014	Cancelled Project	10/12/2014
BNG Packing & T...	Customer C							N/C Chips	09/09/2014	Active Project	10/12/2014
Multi Constructio...	Customer C	2200	R 83 600.00	10	15	R 8 360.00	R 1 254.00	Epoxy Resins	28/11/2014	Active Project	10/12/2014
Royal Adhesives...	Customer B	22000							12/12/2014	Active Project	10/12/2014
Royal Adhesives...	Customer B	7000						Potato Starches	11/06/2014	Cancelled Project	10/12/2014
Royal Adhesives...	Customer B	11000						PVA	05/07/2012	Active Project	10/12/2014
		22000	704000	20	20	140800	28160	Epoxy Resins	07/07/2014	Active Project	09/12/2014
								H/C Resins	09/12/2014	Active Project	09/12/2014
Dreamhouse Wo...	Prospect	30000						PVA	10/06/2014	Active Project	09/12/2014
Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project	08/12/2014
ABE Constructio...	Customer B							Dimethyl Carbon...	04/12/2014	Cancelled Project	04/12/2014
ABE Constructio...	Customer B	14300	286000	10	20	28600	5720	H/C Resins	16/10/2014	Active Project	04/12/2014
ABE Constructio...	Customer B	1100						Propylene Glycol	04/12/2014	Active Project	04/12/2014
ABE Constructio...	Customer B	30000	R 900 000.00	70	15	R 630 000.00	R 94 500.00	VAE Powders	29/02/2012	Active Project	04/12/2014

Book1 - Projects - [Read Only]											
File Home Insert Page Layout Formulas Data Review View Load Test Team											
Clipboard Font Alignment Number Styles Cells Editing											
A1	Company										
	A	B	C	D	E	F	G	H	I	J	K
1	Company	Category	Potential	Value	Probability %	GP %	Real Value	Real GP	Project	Project Date	Project Status
2	Altis Biologics	Customer D							BDO	17/12/2014	Active Project
3	BASF Elastogran	Prospect	2200000						MDI	25/11/2014	Active Project
4	BASF Elastogran	Prospect	66000						Polyether Amine	25/11/2014	Active Project
5	BNG Packing & Technology	Customer C							Potato Starches	09/03/2012	Active Project
6	Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project
7	Multi Construction Chemicals	Customer C	6000						EVA Powders	31/03/2011	Cancelled Project
8	Royal Adhesives Jhb	Customer B	110	R 4 400.00	100	20	R 4 400.00	R 880.00	Defoamers	13/08/2014	Active Project
9	Royal Adhesives Jhb	Customer B							Hardlen CY	21/02/2013	Active Project
10	Tyl-Pro Adhesives (PTY) Ltd	Customer A	11000						Cellulose Replacement	13/01/2014	Active Project
11	Ezeetile	Customer A							Anti-settling & Dispersing Agents	20/08/2014	Active Project
12	Ezeetile	Customer A	250000	R 95 000 000.00	50	3	R 47 500 000.00	R 1 425 000.00	Cellulose	17/07/2014	Active Project

Market Info

'Market Info' allows you to capture details about the activities of your competitors.



Market Information Related to ABE Construction Chemicals

1 OF 3

Select a Product

- Cellulose Ethers
- H/C Resins
- Propylene Glycol

Company: ABE Construction Chemicals

Date: 01/02/2015

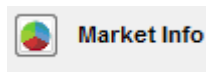
Product: Cellulose Ethers

Supplier: Constructichem

Quantity: 11000

Tylose 900,000 YP2. Tacky cellulose.

It's a good idea to capture details about your sales to the customer as well. This allows you to generate a complete market report on a specific product. Such a market report can be displayed from the main menu.



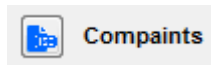
Market Info

Date Edited	Product	Supplier	Company	Volume	Notes
13/07/2012		Constructichem			
09/06/2011			P&F Chemicals		
28/06/2013			Warrior Paints		R28.50
28/06/2012		Nitrocell		50000	R32.00
13/07/2012		Various	Pro-Paint Manufa...	100000	R33.00 per kg
31/05/2013		Undisclosed	Riordan & Co.	7000	R38.00. Ethanol ...
22/06/2011		Various	Promac Paints	30000	
12/07/2012		Crest	Madco Paints	22000	R35.00 per kg.
16/07/2014		Servochem	Devcoat	44000	R30.00 per kg TR...
11/04/2013		du Pont	Paintworx Manuf...	50000	Paintworks uses...
06/06/2013		Servochem	Rosko Paints	11000	R16.00
07/03/2012		Roffes	R.A.M Products	38000	R34.00
09/05/2012		Cathay Pigments	Dekade Paints	77000	R33.00 per kg
04/01/2011		Unknown	Medal Paints		
26/06/2013		Chemgrid	MacPherson Paints	22000	R28.00
15/05/2013		Huntsman	Chemical Speciali...	275000	
19/04/2012		Servochem	Promac Paints	715000	Huntsman TR94 f...
19/09/2013		Cathay Pigments	Olympic Paint Ma...	44000	R30.20
24/07/2013	Acrylic Resins	IMCD	BNG Packing & T...	1900	R51.00
18/01/2011	Anti-Settling & Di...	Unknown	Port Natal Paints		
17/01/2011	Anti-Settling & Di...	Bung Chem	Paintcor	500	
04/01/2011	Anti-Settling & Di...	Unknown	Medal Paints	0	
18/01/2011	Anti-Settling & Di...	Bung Chem	Port Natal Paints	0	Ureac Bentonite a

The report can then be transferred to MS-Excel and analysed according to product.

Customer Complaints

Customer Complaints are applicable if your company has an ISO9000 status.



Customer Complaints

1 OF 24

Date: 25/08/2014 Reference: 9929321

Company: ABC Paints

Contact: Salvan Govender

Product: GMC8120B

Supplier: ZS Chemicals

Batch: NA

Sales Person: Martin Poortvliet

Change Status

CURRENT

ARCHIVE

ARCHIVE

Details

Sample of KBC8120B was tested. Although initial tests looked good, the product continues to thicken over time.

Result

Date: 18/12/2014

Details and Corrective Action

ABC Paints is now getting HEC from a very cheap source

Preventative Action

NA

Customer Complaints shouldn't be deleted. You can change the status to 'Archive' once the complaint has been dealt with.

You can also toggle between current and archived complaints.




A summary of all complaints can be displayed from the main menu.

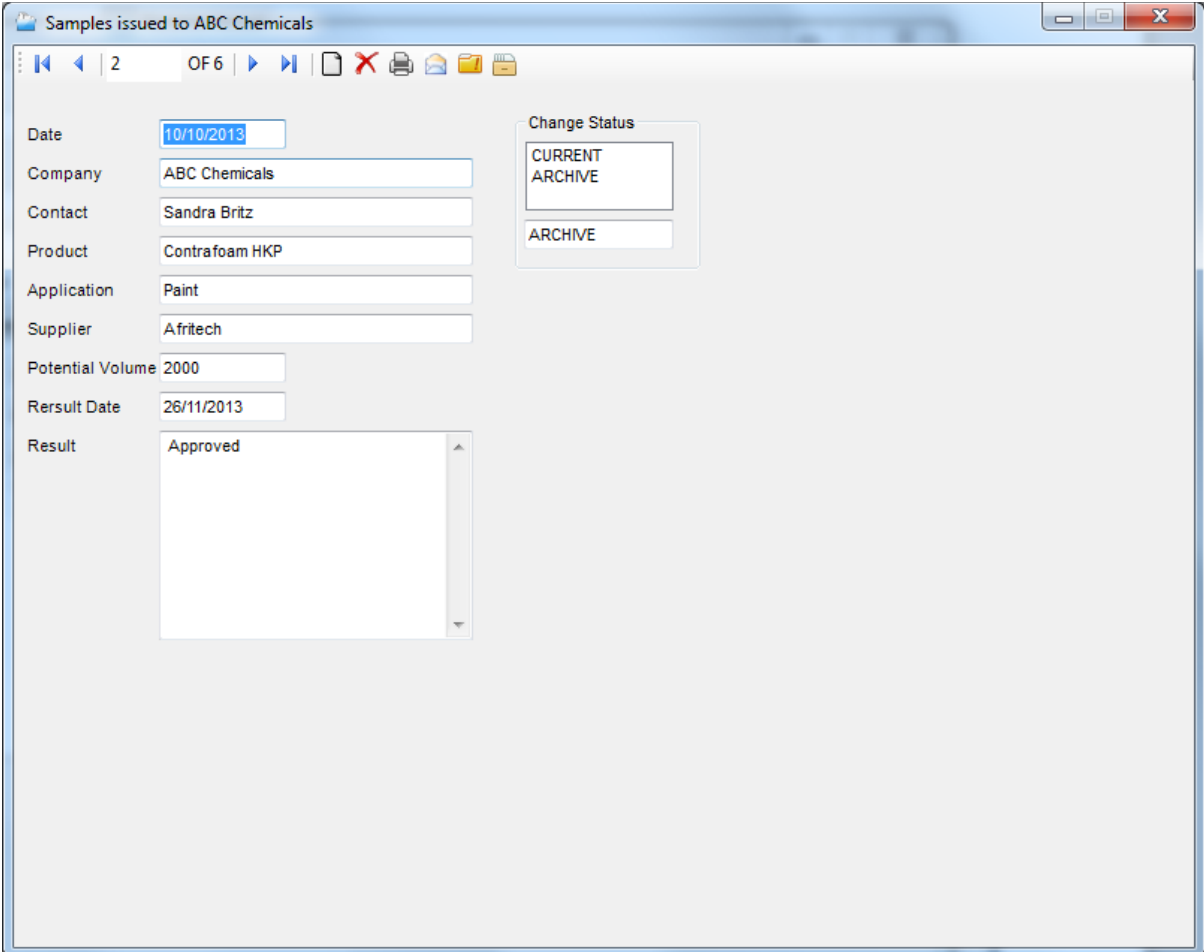


Samples Issued

If your company issues samples you could easily keep track of it.



Samples Issued



Samples issued to ABC Chemicals

2 OF 6

Date: 10/10/2013

Company: ABC Chemicals

Contact: Sandra Britz

Product: Contrafoam HKP

Application: Paint

Supplier: Afritech

Potential Volume: 2000

Result Date: 26/11/2013

Result: Approved

Change Status

CURRENT

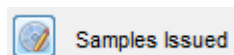
ARCHIVE

Samples issued shouldn't be deleted. You can change the status to 'Archive' once the sample has been approved or rejected.

You can also toggle between current and archived samples.

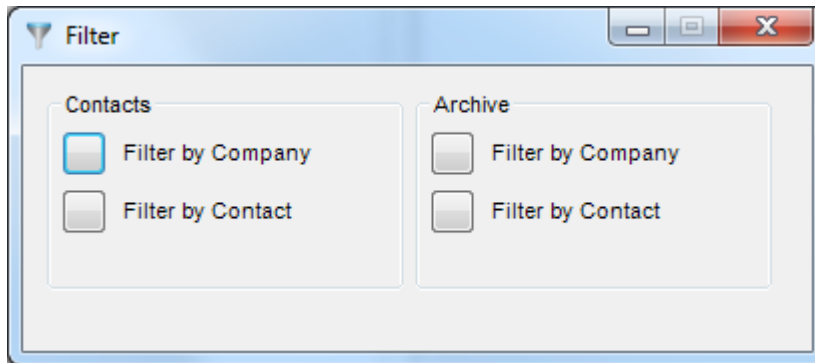
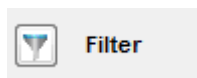


A summary of all samples issued can be displayed from the main menu.



Filter

You can filter by either company or contact.



Results are displayed in MS-Excel from where a filter can be applied. In this example we filter for all contacts by their hobbies.

In 'Contacts' we also have a field for 'Keywords', which can be used to filter contacts.

Location	Telephone	Internet	Miscellaneous
Account	<input type="text"/>	Hobbies	<input type="text"/>
Assistant's Name	<input type="text"/>		
Assistant's Phone	<input type="text"/>		
Category	Customer B	Keywords	<input type="text"/>
Sales Person	Martin Poortvliet		
Sales Manager			
Meeting Frequency	<input type="text"/>	Last Meeting Date	13/08/2015
Notes	<input type="text"/>		

	A	B	C	D	E	F	
1	Company	First Name	Last Name	Job Title	Hobbies	Keywords	City
29	Africote	Nicky					Bedfor
30	Africote	Robert					Bedfor
31	Africote	Robert					Bedfor
32	Afripack	Brian	Pillay				Durbar
33	Afripack	Brian	Pillay				Durbar
34	Afripack	Jeff	Swanson				Durbar
35	Afripack	Jeff	Swanson				Durbar
36	Afripack	Mervin	Pillay				Durbar
37	Afripack	Mervin	Pillay				Durbar
38	Afripack	Roy	Venkatsa				Durbar
39	Afripack	Roy	Venkatsa				Durbar
40	Afritech (Pty)	Dorian					Somme
41	Afritech (Pty)	Dorian					Somme
42	Afritech (Pty)	LOUISE					Somme
43	Afritech (Pty)	LOUISE					Somme
44	Afritech (Pty)	Steve	Nolte				Macas
45	Afritech (Pty)	Steve	Nolte				Macas
46	Afritech (Pty)	TRUDIE					Somme
47	Afritech (Pty)	TRUDIE					Somme
48	Aidex	Tommy		Owner			Kensin
49	Aidex	Tommy		Owner			Kensin

Sort A to Z

Sort Z to A

Sort by Color

Clear Filter From "Hobbies"

Filter by Color

Text Filters

Search

☒ (Select All)
☒ Cricket
☒ Cycling Golf
☒ Fishing
☒ Golf
☒ Soccer
☒ Tennis
☒ (Blanks)

OK

Cancel

Price List

A price list is a handy tool to keep track of your prices.



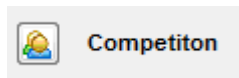
You can search for a specific product and you can also attach specific documents such as product specifications.

A screenshot of a web application window titled "Price List". The window has a light blue header bar with a gold coin icon and the title. Below the header is a toolbar with navigation buttons (back, forward, search, etc.) and a search input field. The main content area contains a form with the following fields: "Product" (ZS1234), "Currency" (R), "Price per Unit" (19.50), "Link" (C:\Users\Martin\Documents\Archive\Attachments\08050508), and "Notes" (a large empty text area). An "Add" button is located to the right of the "Link" field. The window also has standard Windows-style window controls (minimize, maximize, close) in the top right corner.

Product	Currency	Price per Unit	Link	Notes
ZS1234	R	19.50	C:\Users\Martin\Documents\Archive\Attachments\08050508	

Competition

'Competition' allows you to keep track of your competitors' products.



You can search by product and you can also attach documents such as your competitor's specifications.

A screenshot of a web application window titled "Competition". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with navigation icons (back, forward, search, etc.) and a status bar showing "18 OF 248". The main content area contains several input fields and a list. The "Find Competitor's Product" field has a "SEARCH..." button. The "Find Your Product" field also has a "SEARCH..." button. The "Competitor" field is a dropdown menu with "Akzo Nobel" selected. The "Competitor's Product" field contains "BERMOCOLL EM7000FQ". The "Equivalent" field contains "GMC-8110B". The "Attachment" field contains a file path "C:\Users\Martin\Documents\Archive\Attachments\0805050808REP_150" and an "Add" button. The "Notes" field is a large text area with a scrollbar.