

Welcome to the Salestracker Live Quick Start Guide.

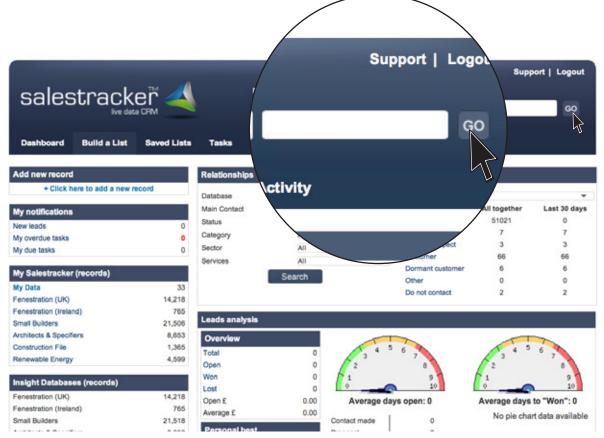
Salestracker is an easy to use, effective sales and marketing tool for the fenestration and construction industry and gives companies a complete solution for generating leads and looking after customers.

Salestracker begins by giving companies live up to date marketing lists; continuously updated in the background by the Insight research team, giving our customers the confidence that their sales and marketing efforts are being seen by the right people.

The quick start guide contains an overview of the key features of Salestracker. If you require any further assistance please do not hesitate to contact a member of the Insight team.

Quick Search

Use the search box in the top right of Salestracker to search for an individual company. Search by company name, postcode, email, town, contact name or telephone number. This is particularly useful for sales reps if they are in an area and want to see surrounding companies by searching on postcode.



Build List enables you to create highly targeted lists based on a company's activity and geographical areas.

UK Fenestration allows you to generate lists based on a primary category; windows/doors, conservatory roofs, composite doors, sealed units and roofline.

Create a list based on company activity (fabricate, buy in and install then segment the data further on material (PVCu/ aluminium, timber) and product range (casement windows, bifolds etc,) and even select based on the profile and volume (recorded in frames per week)

Filter by market sectors (trade, commercial, domestic and new build) and also premises type (head office, showroom, trade counter, factory and depot)

Finally you can select geographical areas; national, regional, postcode or by selecting a mile radius from a specific postcode.

| _ist Builder | | | Fenestration (UK) |
|---|---|--|---|
| urrent number of records in this list: 1 | 4218 Update record count | | Clear filters Next > |
| Main Products | Installer Options (please se | lect) | |
| PVCu * | | No preference \$ | |
| Windows & doors Vertical sliding sash Bi-fold doors | Filter: PVCu | | |
| Aluminium Windows & doors Bi-fold doors Commercial glazing Timber Windows & doors Vertical sliding sash Other materials/hybrids Windows & doors | Activity Fabricate Buy in Markets Served Trade Domestic Commercial New-build Address Type | Profile System © Select © De-select © Aluplast © Deceninck © Duraflex © Eurocell © Halo © Imported © K B E © Kommerling | Frames per week 1 to 25 26 to 50 51 to 100 101 to 250 251 to 500 501 to 1000 1001 to 2000 2001 to 3000 3000+ |

Saved Lists

Once a list has been generated you are able to save this list. Each saved list from the list builder works on the criteria being saved and not the results therefore, as our research team make changes to the database, your saved lists will be automatically updated. Please note it is advised that all lists ported over from Salestracker 2 should be rebuilt in Salestracker Live to incorporate new companies added to the database.

Next to each saved list (which has been created in Salestracker Live) is a View Criteria button allowing you to recap on what filters were used to create the list.

| List Name | No. of Records | Database | Date Created | List Type | View Criteria | Remove List |
|--------------------------------|----------------|-------------------|---------------------|---------------------|---------------|-------------|
| My Data | 5 | My Data | | All private records | N/A | N/A |
| Installers in East Midlands | 1129 | Fenestration (UK) | 15/07/2013 11:38:44 | Dynamic | View criteria | Delete |
| Builders | 143 | Local Builders | 09/07/2013 12:03:55 | Dynamic | View criteria | Delete |
| PVC fabs | 1596 | Fenestration (UK) | 26/06/2013 13:26:42 | Dynamic | View criteria | Delete |
| abricators | 1641 | Fenestration (UK) | 20/06/2013 09:48:03 | Dynamic | View criteria | Delete |
| South West | 4370 | Fenestration (UK) | 13/06/2013 14:37:29 | Dynamic | View criteria | Delete |
| top prospect | 4 | Fenestration (UK) | 13/06/2013 02:46:32 | Hotlist | NA | Delete |

These are created within an individual record and can be assigned to all users or a specific user who has access to Salestracker within your organisation.

By clicking on the Create new task button this allows you to enter a description of the reminder, assign a user, date and time and also gives you the option to be notified when the task is completed or overdue. There is also the option to remind the assignee leading up to when the task is due and this will come through as an email notification as well as appearing on the dashboard.

| Create a M | lew Task | | | | × type All Tasks |
|------------------------------|-------------------------|-----------|---|--|------------------|
| Assigne Create a Description | | | | Include relevant contacts: By ticking relevant contacts, task email reminders will include their contact information. | ascription |
| Assign to | | All users | - | 🗌 Trevor Johnson | |
| Task type | | Select | Ŧ | | |
| Date/Time | Click here | 00:00 | • | | |
| Send assi | gnee email notification | n of task | | | |
| Send assi | gnee date/time email | reminder | | | |
| Email me | when task is 24 hours | overdue | | | |
| Email me | when task is complete | d | | | |
| | | | | Create | |

Relationships

This is an area where you can assign a record as being a customer, prospect, dormant customer, future prospect or other.

You also have the ability to assign someone from your company as an account manager to customers or a sales rep to prospects and categorise the companies according to value to your business with a bronze, silver, gold or platinum classification.

There are also two customisable fields in this section where you may want to include additional information relevant to your company.

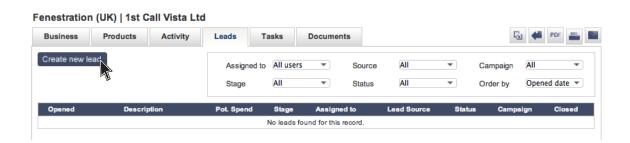
| Business | Products | Activity | Leads | Tasks | Documents | | 🖓 🐗 PDF 🚞 🖡 |
|---|--|--|---|----------------|---|--|---|
| Business Details | | | Gene | ral Details | | Relationship o | <► |
| Company Name Trading as Address City or Town Region Postcode Telephone No. Fax No. | 1st Call V Unit 36 Barn Coos Redruth South We TR15 3RC 0120931 | se Industrial Estate st | Requ Marke • Tra • Doi • Coi • Ne Does Limite Credi | et Sectors | n this record: click here Type of Premi Head Office Showroom Factory Other install? YES ES 55 | Main contact Category Sector Services Potential spend: £0. | Prospect Unassigned Bronze Select Select 00 |
| Company Email Website | | ows@live.co.uk Set tcallvista.co.uk) | Cr | reate new lead | Create new task | Last CRM activity: | Save |
| Title F | First Name | Surname | Position | Phon | e Email Ad | idress | Primary |
| Mr | Trevor | Johnson | Director | | | | |

Fenestration (UK) | 1st Call Vista Ltd

The Leads section gives users the ability to create a lead against a company regardless of who is assigned as the key contact in the relationship section.

Using leads is a great way of keeping track of any new or repeat business opportunities. Each lead is created against the company and automatically populates company name, contact and address information.

Users are then able to record against each lead, what stage of the sales process they're at, who is responsible for the lead, potential spend, where the lead generated from (website, reps etc.) and also the date the lead came in.



| Fenestration (UK) 1st Call Vista Ltd | | | | | | | |
|---|-----------------------|--|--------------|-------------|--|--|--|
| Business Products Activity | Leads Tasks D | ocuments | | 🖓 🐗 PDF 🕳 🖬 | | | |
| Create new lead | Assigned to All users | Source All | Campaig | Dened date | | | |
| Create a New Lead 1st Call Vista Ltd Trevor Johnson, Direct Unit 36 Barn Coose Industrial Es Redruth TR15 3RQ Tel: 01209314466 Details: | | Pipeline stage Assign to Potential spend (£) Campaign Lead source Lead date | Contact made | on Closed | | | |

This area allows marketing teams to plan campaigns in advance and record in Salestracker the campaign plan (direct mail followed by email, adverts in trade press to correspond) and assign lists of prospects to the campaigns as well as the creative (sales letter, flyer, magazine ad etc.)

When creating a lead, sales reps are then able to flag that lead against a campaign and over time analyse response rates from each campaign.

| Create a | new campaign | Filter campaign type: A | 11 | Filter | Campaign | Summary | / 📢 |
|------------|------------------------------|-------------------------|------------------|--------------|----------|---------|------------|
| Created | Name | Туре | Description | Documents | Lists | Leads | Action |
| DEFAULT | General Marketing | General Marketing | Default campaign | | | 0 | |
| 09/07/2013 | July 2013 | Lead Generation | | No documents | No lists | 0 | \diamond |
| 09/07/2013 | July 2013 summer & Autumn | Lead Generation | | No documents | No lists | 0 | |
| Created | Name | Туре | Description | Documents | Lists | Leads | Action |
| DEFAULT | General Marketing | General Marketing | Default campaign | | | × | |
| | Edit an exi | sting campaign | | | | Ŭ 0 | |

| PAULI Gene | | | | | Š | |
|-----------------------|------------------------------|----|--------------------------------------|---|-------|--|
| 7/2013 July 201 | Edit an existing campaign | | | | | |
| 7/2013 Summer Glaz | Name of Campaign | | Attach document(s) | | | |
| Ulazi | July 2013 Direct Mail letter | | Choose File no file selected | | | |
| | Description of Campaign | | Attach Max 5MB per file | | | |
| yright © Insight I | | | Need more data storage? Request More | | rms a | |
| | | 11 | Attached documents | | | |
| | Campaign type | | No Documents | | | |
| | Lead Generation | - | | _ | | |
| | Date (click to change) | | Attach saved lists | | | |
| | 11/07/2013 | | Select | • | | |
| | Save | | Attached lists | | | |
| | | | No Lists | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Reports

The Dashboard displays an overview of sales activity which pulls information from the Leads section. It gives the individual users a summary of their performance where as managers have the ability to see an overall view for the company. There is also an advanced report section which appears under Track Activity which allows a more detailed report to be created.

Databases

Switching between databases can be done through the quick search (top right corner) or on the Build a List Page top right under the toolbar. As each database has different information contained within at present the option to search two databases simultaneously is not available.

Contact information

| General Enquires | Customer Service, Sarah Guest | support@insightdata.co.uk 01934 428773 |
|--|--|---|
| Technical Enquires | Technical Support, Sean Payne | support@insightdata.co.uk 01934 428773 |
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| Subscription Enquires | Sales Manager, Sonia Punter | sonia.punter@ascotgroup.co.uk 01934 808293 |
| Accounts Enquires | Commercial Director, Helen Costeloe-Hughes | helen@ascotgroup.co.uk 01934 808293 |
| Direct Mail, Email and Telemarketing Enquires | Direct Marketing Manager, Victoria Francis | victoria.francis@ascotgroup.co.uk 01934 808293 |

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