Salestracker Live- Quick Start Guide

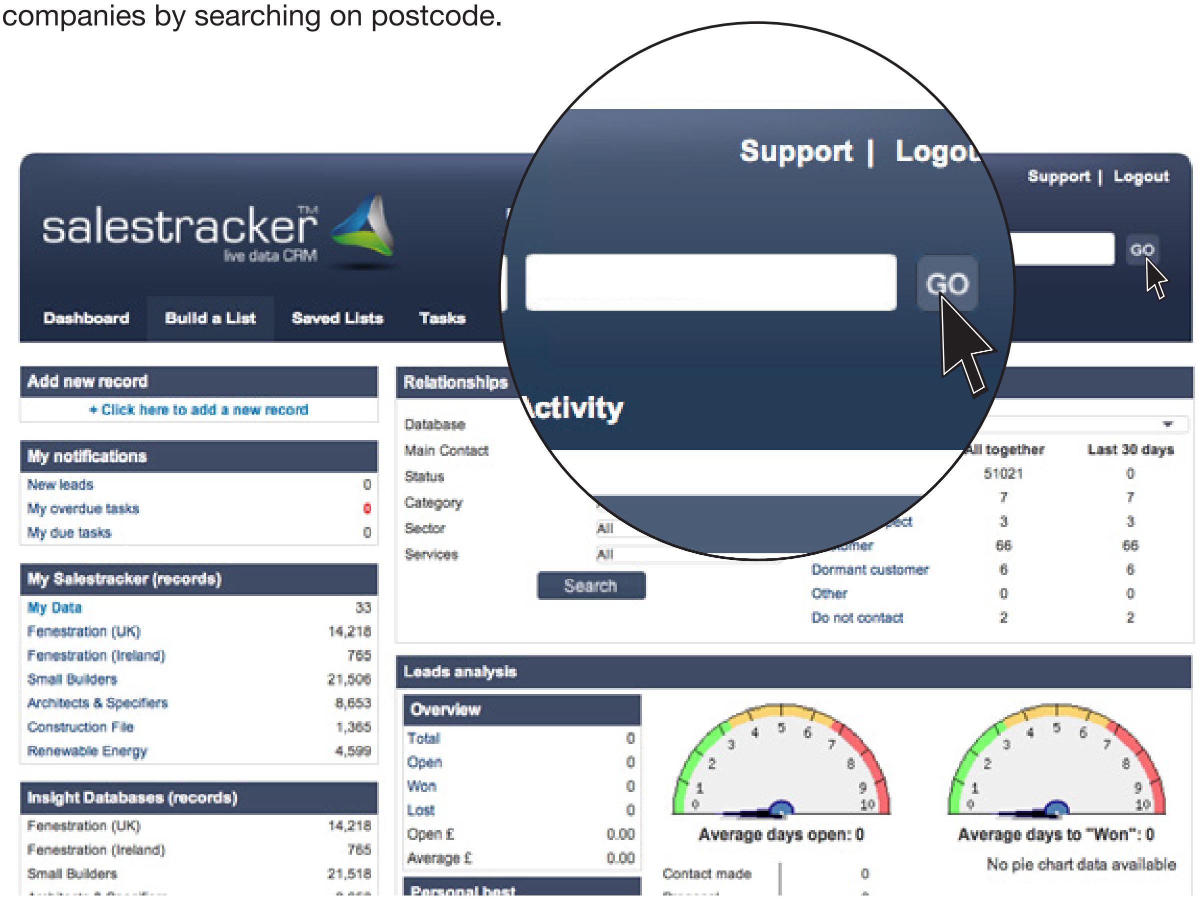
Welcome to the Salestracker Live Quick Start Guide.

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.

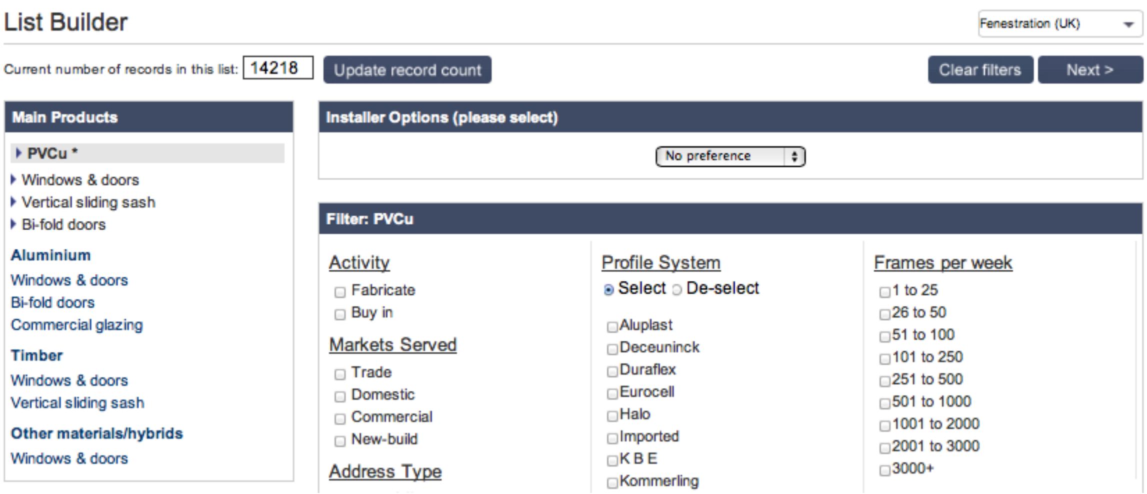


Build List

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.



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.

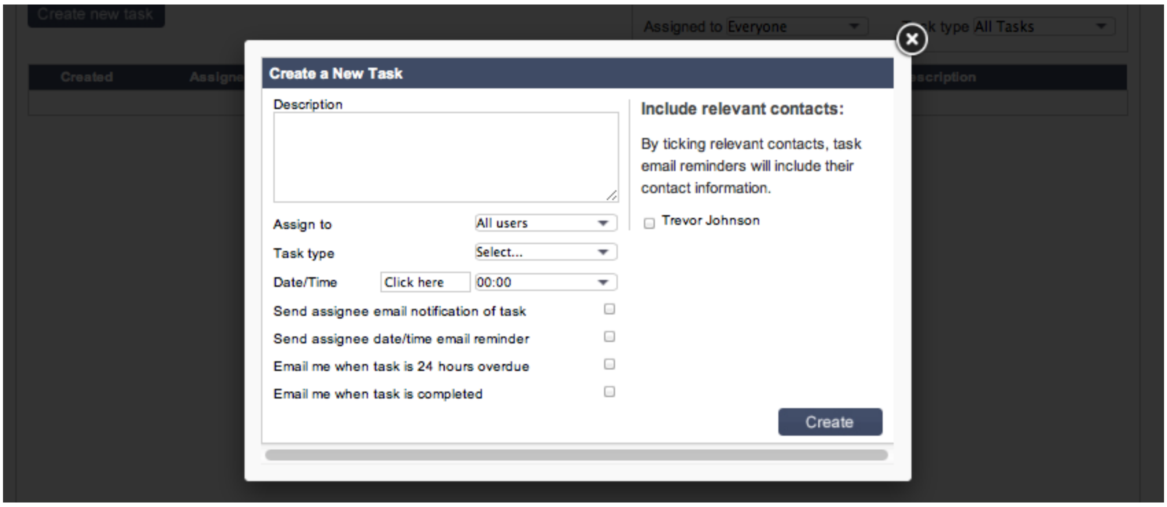
Next to each saved list (which has been created in Salestracker Live) is a View Criteria button allowing you to recap on what filters were used to create the list.

My Saved Lists

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)	28/06/2013 13:26:42	Dynamic	View criteria	Delete
fabricators	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	N/A	Delete

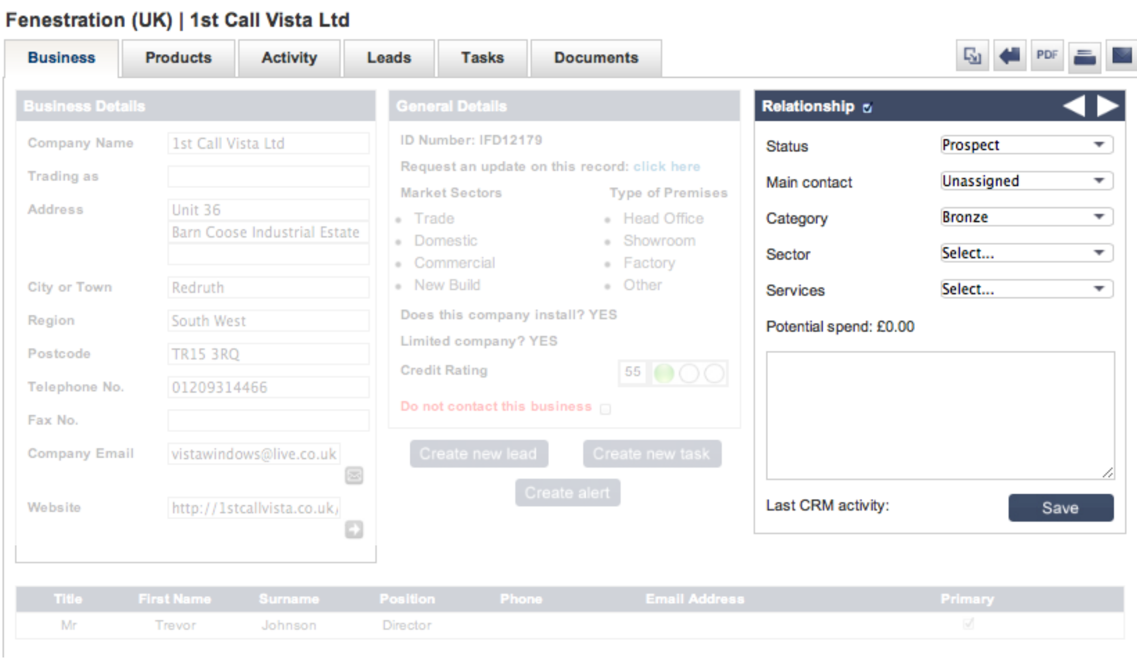
Tasks

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.



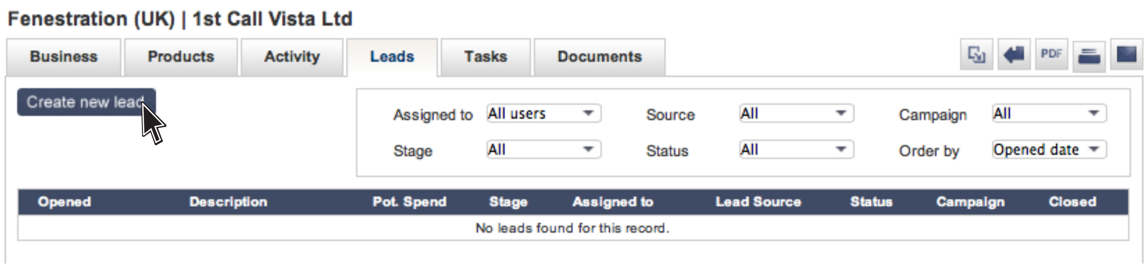
Relationships

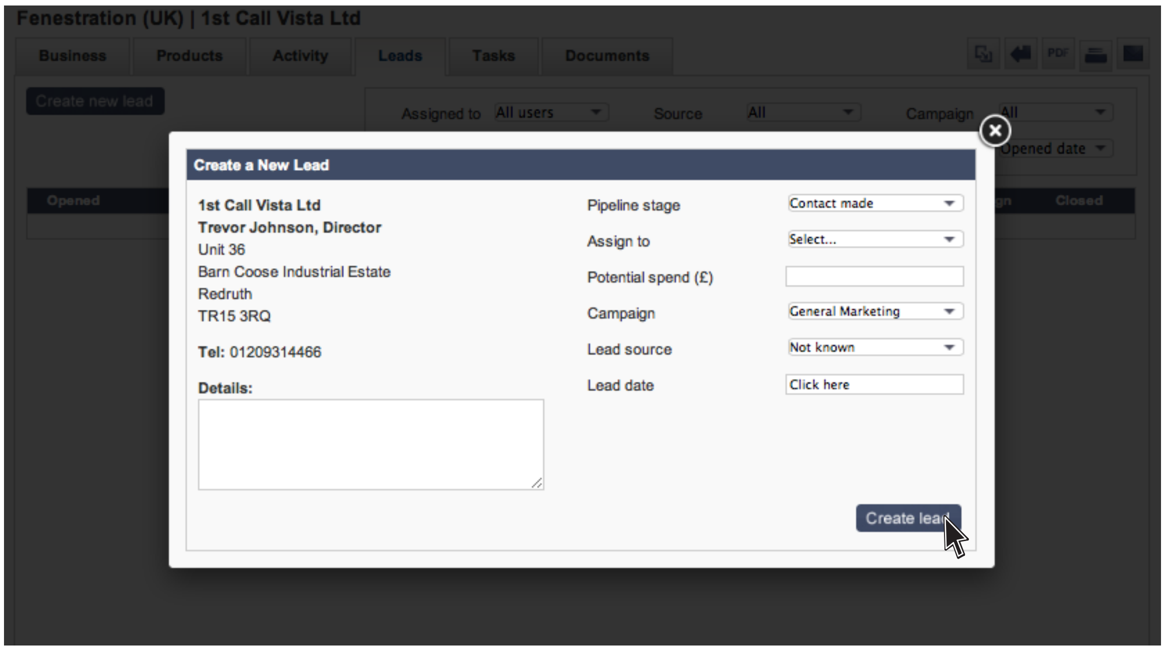
This is an area where you can assign a record as being a customer, prospect, dormant customer, future prospect or other.
You also have the ability to assign someone from your company as an account manager to customers or a sales rep to prospects and categorise the companies according to value to your 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.



Leads

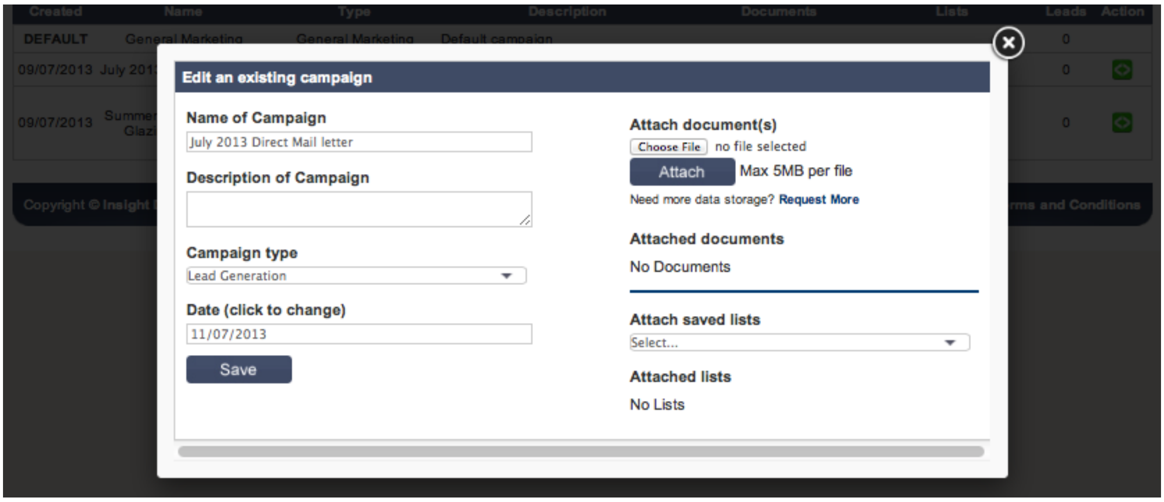
The Leads section gives users the ability to create a lead against a company regardless of who is assigned as the key contact in the relationship section.
Using leads is a great way of keeping track of any new or repeat business opportunities.
Each lead is created against the company and automatically 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.





Campaigns

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.



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

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