

InterAcct for Sales Management

InterAcct Software Pty Ltd

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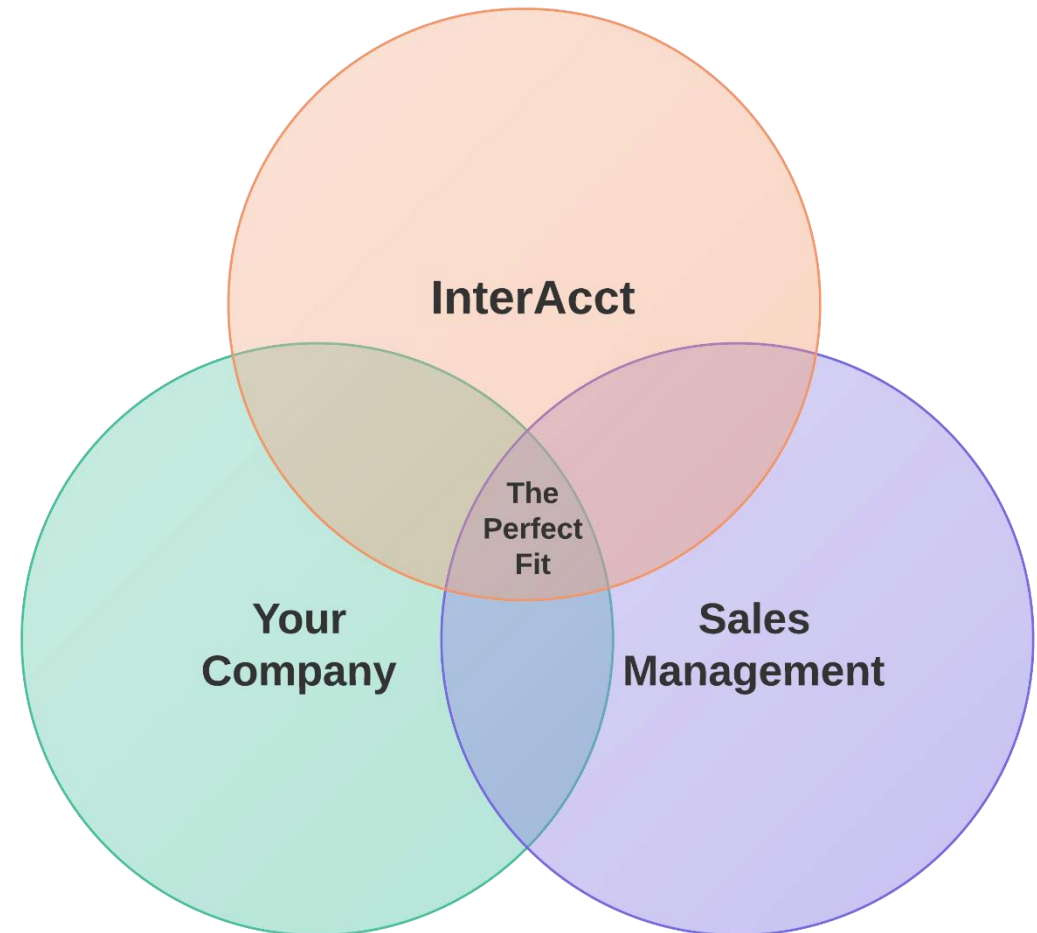
InterAcct
SOFTWARE PTY LTD



InterAcct for Sales Management

Why InterAcct?

- ☑ **Integrated** Fully integrated system from first recording a new sales enquiry, to estimating, quoting, win/loss analysis, purchasing, invoicing, and all the other accounting processes.
- ☑ **Activity Mix** View the quality and quantity of sales activities.
- ☑ **Sales Targets** Set daily sales \$ and activity targets by salesperson – check variances.
- ☑ **Route Planning** Improve efficiency of Customer visits by region, call route.
- ☑ **Hot Prospects** Manage Hot Prospects by Salesperson.
- ☑ **Due to Close?** Monitor the due close dates of quotations.
- ☑ **What Priorities?** Prioritise follow ups – check if they are overdue.
- ☑ **Lost Business** Analyse the reasons why sales are won or lost.
- ☑ **Conversions** Analyse what lead sources are most profitable
- ☑ **Less Admin Effort** Quickly convert a Prospect into a Customer – estimate to quote to invoice.





Client / Prospect File

- A** Menus are numbered for quick selection
- B** Can use the traditional **Pull-Down** Windows menus (rarely needed)
- C** Click on menu “**buttons**” to locate a business and get directions to their site through Google Maps.
- D** “**Tab**” menus ‘freeze’ where you were, and then allow links into unrelated areas of InterAcct
- E** Menus are displayed based on the **Status** of a record (e.g. Debtor menus are not normally shown on a Prospect record)

InterAcct Demo - [BUSINESS NAMES DATABASE - display]

File Record Edit View Go Advanced Menu Graph Design Help

Title	Mr	Type	B	Business	Record Id	CORENTFA
1st Name	Kenneth	Dear ?	Ken		1st Added	15-Nov-2013
Surname	Carruthers				Last Date	10-Mar-2014
Position	General Manager				Next Date	
Business	Corporate Enterprises Pty Ltd				Last Inv	

Ph Area 02
 Bus Ph 9976 4433
 Fax No 9976 8800
 Mobile 0413 223 332
 After Hr

Address 100 Sydney Road
 The "Cleveland" Building
 Suburb LINDFIELD
 Country NSW P/C 2070
 Region N.SYD.NTH

Status	CLIENT	A/c Mgr	LARRY.M	Overdue \$	3,229.76
Category	1.LARGE	Cust Type	WHOLESALER	Balance \$	14,315.08
Origin	YELLOW-P	Cust No			

Email ken@corpent.com.au
 Web Site www.corpent.com.au
 Comment developers of industrial properties

Form help | Field help | Jobs | Accounting | Search | Tables | Messages | Suburbs | Reports | Tasks

This field value denotes the current status of this record.
 For "Clients", the Debtors Menu will automatically appear on the right hand side.
 Once you win a job, or invoice a party, then their Status will change automatically.
 The Status Code also determines the values of the next lower filed "Category".

Menu

1. Contact Names	18. Debtor's Info
2. Notes File	19. Accounts Contact Info
3. Delivery Addresses	20. Opening Balances
4. Client/Prospect Profile	21. Debt Collection
5. Create/Send Letter	22. Aged Debtor Analysis
6. Contact History	23. Debtor Reports
7. EMailS Sent/Received	24. Create Report Designs
8. Client Jobs, Enquiries	
9. Input Quotes/Invoices	
10. View : Sales Orders	
11. Standing Sales Order	
12. Sales/Profit Analysis	
13. Product Purchase History	
14. Document Register	
15. Service/Maintenance	
16. Debtor's Totals	
17. Debtor's Ledger	

Google Map Directions
 Manual Video



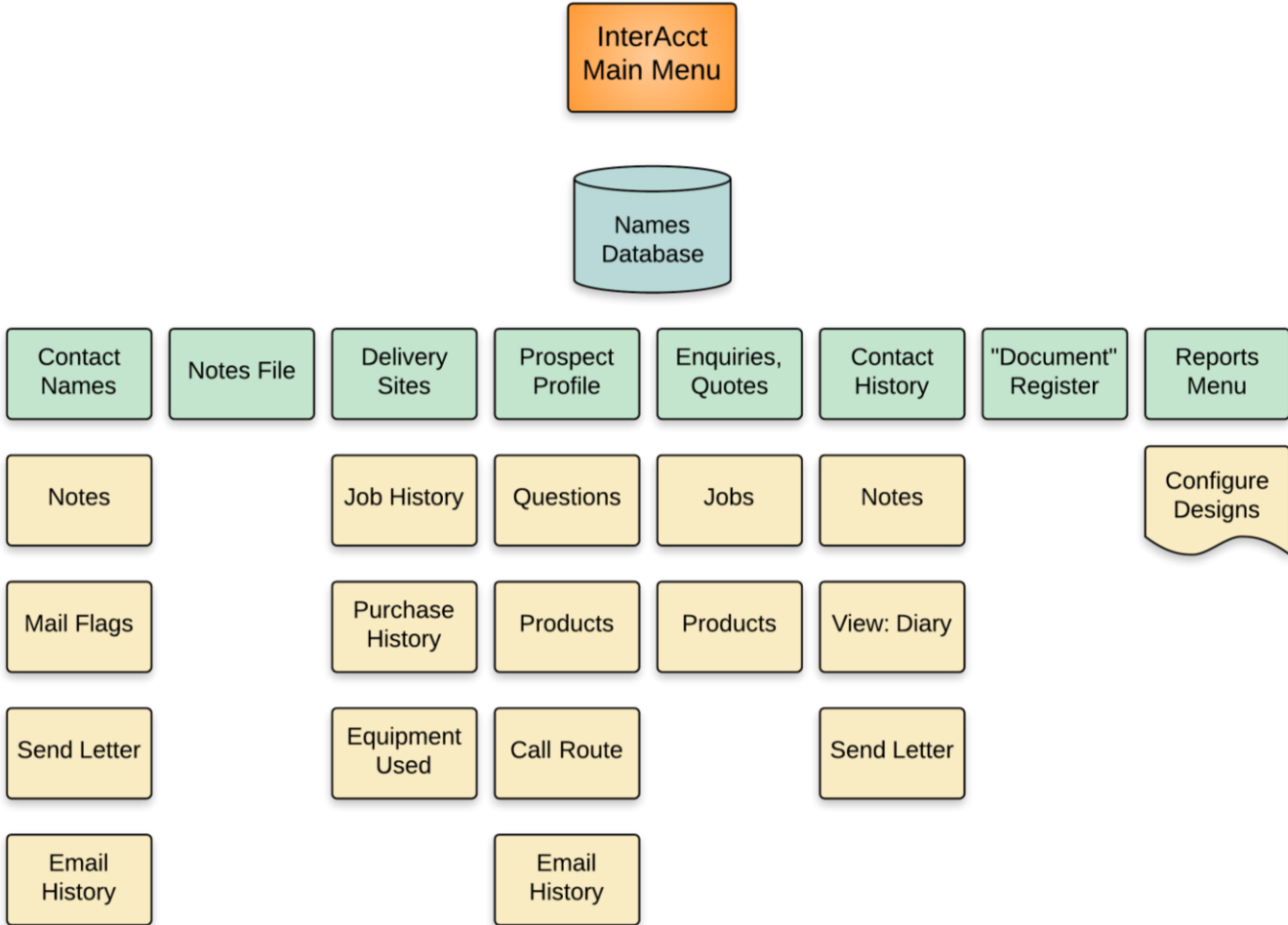
Client / Prospect Structure

Easy to use.

Relational Database:
No limits to the number of records (e.g. Contact Names)

Integration:
Easy links between a Business Name (Client/Prospect) and Accounting, Estimating, etc.

Corporate Goodwill:
Enhance the value of your business by recording information about any potential customer





Key Features & Advantages

	Feature :	Advantage :	Base?
Categorise	Categorise and Classify Clients/Prospects by Status, Rating, Industry, Source of Lead, Potential, etc.	Interrogate your Names Database to identify potential sales opportunities.	Base
Contact Names	Any number of contact names per Company – multiple contact numbers, emails, etc.	Who are the Decision Makers, Breakers, and Recommenders? Get close to your Prospect by recording the small important information pieces.	Base
Delivery Addresses	Any number of delivery addresses per Company.	Show Job and Product Purchase history by location.	Base
Contact History	Register of past activities/contacts per Client – Automatically updates Follow Up Diary.	No need to commit to memory what events happened last, and when best to follow up.	Base
Comments	Free format note areas – by company, by contact name, contact history, etc.	Easy handover to a new salesperson with notes being properly recorded and secure.	Bas
Client/Prospect Profile	Profile a Prospect – what products being used, competitor involvement, future needs, purchase history, sales/profit analysis.	What a Prospect has used, or is currently using is normally a good indication as to their future needs and therefore what to quote / sell them.	Base
Mail Flags	Attribute “Mail” flags to each contact.	Direct marketing (letters/emails) only work when you can target your message to interested parties.	Base
Emails	Click to email a contact. Also, select companies/names to mass email.	Option to maintain a history of all emails sent and received by Company/Contact.	Base
Google Maps	Click to view map location of Client – plus directions from your office to them.	No time wasted trying to find where a client is located, directions are ready to go.	Base
Call Campaigns	Set up an automatic customer follow up system for re-orders?	Call and Route Plans ensure that high potential Prospects are not overlooked.	Base
Quick Search	By Surname, First Name, Email, Business Name, Suburb, Phone Number, etc.	Always find the Client/Prospect quickly and easily by knowing just a snippet of information.	Base
Telemarketing	Telemarketing system to generate qualified leads.	Gather information about ‘raw’ names. Convert into Prospects and make sales appointments.	Option



Screen 1: Business Names Listing

Business Names listing:

You can **colour** code fields (or whole lines) – to highlight records by their status or category

You can **re-sort** records by any field value

At the **List**, you can call up an existing record, else add a new one

InterAcct Demo - [BUSINESS NAMES DATABASE list]												
File Record Edit View Go Advanced Graph Design Help												
	*Customer/Prospect/Supplier	Bus Ph	Mobile	Status	Category	A/c Mgr	Balance \$	Last Date	Next Date	Cust No	Cust Type	Comment
1	ABC Insurance Company Pty Ltd, Owe	9233 4455		CLIENT	INSURANCE	JOHN.H	0.00				INSURANCE	
2	Adept Turnkey Pty Ltd, Marc Fimeri	9242 5411		TRADES	CARPENTER		0.00					Sub Contractor - Building Services
3	AGT Distribution Pty Ltd, David Rodg	9877 4423		PROSPECT	2.MEDIUM	JOHN.H	0.00	26-May-14	25-Aug-14		COMM.INDUST	sell paper & packaging products
4	A Lasting Partnership, Geo Rui	3653 9205		SUPPLIERS	IMPORTS.M		0.00					Plant & Equipment
5	Appliance World Pty Ltd, Terry Petter	9766 4433		SUPPLIERS	APPLIANCES		0.00					Kitchen Appliances
6	Blue Pearl Property Services, Maria	9898 8580		CLIENT	2.MEDIUM	MADDIE.	5,657.96	20-Mar-14	20-Mar-14		PROPERTY	property maintenance & management company
7	Bolts & Industrial Supplies Pty Ltd,	3277 8655		SUPPLIERS	COMPONENT		0.00					Screws, Nuts, Bolts, Etc.
8	Bone Timber Products On-Line, Mar	4355 7766		SUPPLIERS	WOOD		0.00					Timber Products
9	Cable & Wire Sales Pty Ltd, Manage	9766 4455		SUPPLIERS	ELECTRICAL		0.00					Electrical Products & Cables
10	Cash Sale Customer, Manager	9975 4653		CLIENT	4.ONE	N/A	0.00	11-Jun-12	6-Mar-12		DOMESTIC	
11	Components for Manufacture Pty Ltd	9877 5544		SUPPLIERS	COMPONENT		0.00					Manufacturing Bits & Pieces
12	Corporate Enterprises Pty Ltd, Kenne	9976 4433	0413 223 332	CLIENT	1.LARGE	LARRY.M	14,315.08	10-Mar-14			WHOLESALER	developers of industrial properties
13	Design Industry Steel Supplies Pty L	9555 1166		SUPPLIERS	METAL		0.00					Steel Supplies
14	D.H.B. & Associates Pty Limited, Barr	9970 7577		TRADES	ELECTRIC		0.00					Electrical Contractors
15	Direct Imports Pty Ltd, Penelope Mai	9344 5555		PROSPECT	1.HOT	LARRY.M	0.00	27-Aug-14	28-Aug-14		COMM.OFFICE	referred by john carruthers
16	Direct Steel Sales, Manager	9408 8833		SUPPLIERS	METAL		0.00					Steel Columns and Lengths
17	Diverse Builders Pty Ltd, Jaime Niel	5862 2712		PROSPECT	2.WARM	MADDIE.	0.00	9-Apr-14			BUILDER	commercial construction company
18	Dyno Nobel, Rebecca Brown	9969 9000		SUPPLIERS	PLUMBING		0.00					Plumbing Contractors
19	Electricity NSW, Manager	133 200		CREDITOR	EXPENSE							Electricity
20	Humpries Direct, John Humphry	9977 8600		CREDITOR	STATIONERY							Printing & Stationery
21	Illumination Technology Ltd, James	9415 9941		SUPPLIERS	LIGHTING		2,654.87					Lighting Products
22	InterAcct Software Pty Ltd, Simon Rai	9975 4653		CREDITOR	SOFTWARE							Support Requests Need to Be In Writing
23	JDC Flooring Pty Ltd, Jason Carter	9534 3088	0414 554 321	SUPPLIERS	WOOD		215.60					Flooring and Wood Products
24	Miller, Annette	9977 6544	0413 223 444	CLIENT	3.SMALL	JOHN.H	333.50				DOMESTIC	has bank finance - ready to start work
25	Northside Accountants, Tim Paterso	9984 7774		OTHER	ACCT	LARRY.M						company accountants
26	Steel Roofing Supply Centre, Manag	9807 3322		SUPPLIERS	ROOFING		0.00					Roofing and Guttering Products
							23,177.01					



Screen 2: Contact Name File

Contact Name File:

This is an example of one Contact Name record (within a Company)

Extra (free format) **Notes** can be entered, or 'Cut & Paste" from outside InterAcct

You can use the Name & Address information within InterAcct to automatically create a **letter** within InterAcct or MS-Word

There is a **BirthDay** reminder system

This file updates the **Search** on First Name, Surname, Phone Number, and Email

InterAcct Demo - [CONTACT NAMES - display , Corporate Enterprises Pty Ltd, Kenneth C]

File Record Edit View Go Advanced Menu Graph Design Help

Mr,s, 1st Name Surname Salutation
 Mr Kenneth Carruthers Ken
 Title/Position General Manager

Direct Ph 9977 5644
 Mobile Ph 0413 223 332
 Home Ph
 Fax No
 Add Date Fri 15-Nov-2013
 Secretary Denise
 Birthday 12-Mar-1982

E-Mail ken@corpent.com.au
 Comments DECISION MAKER
 Seq No Id 1

Menu

1. Contact Name Notes
2. View: Emails Sent/Received
3. Mail Flags
4. Send Standard Letters
5. Send E-Mails
6. Link to Documents
7. Contact History
8. Reporting
9. Prospect Profile
10. Sync with Mailboxes

Form help Field help Jobs History Debtor's Tasks Help Accounting Messages

This first (main) name always copies directly into this file from the main Customer Record.

You can add any number of additional names into this file. When you do, the system will always update the search by surname and first name files.

Mail Flags
Accounting



Screen 3: Contact History – Follow Up

Contact History:

Arguably the hub of the Sales Management system

Record what has happened, and when next to **follow up**

Updates the salesperson's **Diary**

Updates the salesperson's Activity **Analysis** – Daily Activity Report

The screenshot shows the 'InterAcct Demo' application window. The title bar reads 'InterAcct Demo - [CONTACT HISTORY - display, Corporate Enterprises Pty Ltd, Kenneth C]'. The menu bar includes 'File', 'Record', 'Edit', 'View', 'Go', 'Advanced', 'Menu', 'Graph', 'Design', and 'Help'. The toolbar contains various icons for navigation and actions.

The main content area is divided into several sections:

- This Activity - What Happened? Who was Contacted?**

Date	Thu 13-Mar-2014	Action	APPT	Appointment - In Office
Employee	JOHN.H	Rating	1.LARGE	
Contact	Denise Redmond			
This Action	Direct Bank Transfer Today			
- Next Activity - When/Who to Follow Up?**

Follow Up	Fri 14-Mar-2014	Next	FOLLOW-UP	Appointment - In Office
Employee	LARRY.M			
Next Action	Check Bank Account for Funds Received			
- Notes**

Said He Would Transfer \$10K As A Deposit

On the right side, there are four icons representing 'Contacts', 'Documents', 'Accounting', and 'Messages'. Below them is a 'Menu' section with a list:

1. Send Standard Letter
2. Letters via MS-Word
3. Contact History Notes
4. Messages & Appointments
5. Contact Names

At the bottom right, a box shows metadata:

Updated Date	Wed 27-Aug-2014
Updated Time	10:02 AM
Updated By	CVR

At the bottom left, there are tabs for 'Form help', 'Field help', 'Last-Actions', 'Next-Actions', 'Help', 'Contacts', and 'Activity-Codes'. Below these tabs is a yellow box with text: 'This is where you can record details of contacts made with this Prospect/Customer, and follow ups to be posted to the diary. This file also be automatically updated when you print a run of letters to a selected group of names.'



Screen 4, 5, 6: Prospect / Client Files

Free Format Notes:
Input comments, or 'Cut & Paste' from external documents

COMMENTS FILE

29 Aug 2014 7:14:55 AM Clive Rainbow

Year Established : 1988
 Employees : 23
 Branch in Newcastle
 Turnover : \$ 8m (2012)
 Shareholders : Larry Jones (semi retired)

Delivery/Sites:
Multiple Locations (Per Prospect/Client)

CLIENT LOCATIONS list, Absolute Contracting (NSW) Pty Ltd, Paul

File Record Edit View Go Advanced Graph New Design Help

	Street Address	Suburb/State/Post Code	Directions	Phone No
1	26 Wicks Road	MACQUARIE PARK NSW 2113	Left of LaneCove Rd Onto Coxs Rd	9645 1120
2	2 Lyonpark Rd	MACQUARIE PARK NSW 2113	Entrance Via Waterloo Rd	9645 1120

Mail Flags: (Per Contact)
Used to select the basis of receivers for letter/email selection

Mr,s, 1st Name Surname Salutation

Mr Paul Leim Paul

Title/Position General Manager

MAIL/LETTER FLAGS list, Absolute Contracting (NSW) Pty Ltd, Paul

File Record Edit View Go Advanced Graph New Design Help

	Mail Flag	Comments
1	ANNUAL	ANNUAL EOFY NEWSLETTER
2	MANAGE	MANGEMENT STAFF
3	UPDATES	UPDATES IN PRODUCT LINE





Screen 9: Sales Management Menu

Sales Management Menu:

Quick Search by First Name, Surname, Phone Number, Email, Business Name, etc

Visual Search Enquiries:

Lots of other Visual Search Enquiry files to analyse where management needs to put their energies

The screenshot displays the Sales Management Menu interface. At the top, there are five main icons: Clients, Daily Alerts, Quotes/Invoices, Sales Orders, and Jobs Database. Below these is a 'Menu' section with a list of 36 items organized into three columns. The first column includes items like 'Prospect Categories', 'Customer Types', and 'Routes/Regions'. The second column includes 'Employee Targets', 'Daily Performance', and 'Search & Analysis' items. The third column includes 'Names by Mail Flag', 'Birthday Reminders', and 'Quotation Register'. At the bottom of the menu, there is a navigation bar with tabs for 'Form help', 'Field help', 'Contact-Us', 'Employees', 'Management', 'Finance', 'Payroll', 'Admin', 'Stock', 'Service', and 'Factory'. Below the navigation bar is a text area with contact information for support.

Menu		
Getting Started :		
1. Prospect Categories	15. Employee Targets	27. Names by Mail Flag
2. Customer Types	16. Daily Performance	28. Birthday Reminders
3. Routes/Regions		29. Quotation Register
4. Employees	Search & Analysis :	30. Documents Database
5. Salespersons	17. Daily Activities	31. Property Database
6. Origin Codes	18. Activity Summary	32. Sales Analysis
7. Sales Activities	19. Task Schedule	33. Delivery Schedule
8. Event Activities	20. Day Book Log	34. Employee Sales Analysis
9. Report Templates	21. Names - Date/Origin	35. Invoice Register
10. Mail Flags	22. Route Plan	36. Follow Up, Re-Orders
11. Prospect's Questions	23. Hot Prospects	
12. Product Applications	24. Names by Status	
13. Customer's Suppliers	25. Prospect Profile	
14. Competitor's Products	26. Prospect's Products	

Form help | Field help | Contact-Us | Employees | Management | Finance | Payroll | Admin | Stock | Service | Factory

Welcome to InterAcct Software - Sales Management Menu.

For support, please contact -
 support@interacct.com.au
 or
 Fax : (02) 9975 7269

A vertical sidebar of search and enquiry icons. From top to bottom, the icons are: Business Names (magnifying glass over people), Phone Numbers (mobile phone), Surnames (two men), Email Addresses (envelope), First Names (group of people), By Post Code (envelope with location pin), Manual (question mark in a circle), and Video (film reel).



Screen 10: Customer Product/Services Profile

Customer Product Profile:

What products or services that a Prospect has used in the past, or is currently using, is normally directly related to what they will (or should) use in the future

This profile will become invaluable as a way to identify future business (upgrade) **opportunities** – and when best to follow up

This business intelligence record will become a most valuable **Corporate Asset**

It is a way to assess the future business **potential** of a Prospect – and identify where your future product releases might be successful

InterAcct Demo - [CUSTOMER PRODUCT PROFILE - display, Corporate Enterprises Pty Ltd, Kenneth C]

File Record Edit View Go Advanced Menu Graph Design Help

Using NEED

Product Description	Noise Maker		
Our Equivalent Product	AV Sound Blaster, Model ABC123		
Qty PA #	5	Updated	27-Aug-2014
Unit Price \$	350.00	Next Order ?	15-May-2015
Value \$	1,750.00	Exp Sell \$	450.00
Application	Board Room AV Fitout		
Current Supplier	Cut Price Products Pty Ltd		
Last Action	Reviewing Contract In May 2015		
Next Action	Prepare Quote		

Menu

1. Client Equipment Profile
2. Comments - Notes
3. Contact History
4. Contact Names
5. View : Sales Orders

Form help | Field help | Sales-Orders | Products | Applications | Suppliers

This is where you can record all the products a customer (Prospect) might be using, or has used previously, or needs in the future.

Products
Application
Suppliers



Screen 11: Employee Targets

Employee Targets Menu:

Create (by salesperson):

- Sales and Quote Targets
- Sales Activity Budgets

Also, by Employee :

- Chargeable, Non Chargeable Hours

Compare the variances to their actual results – on a daily or monthly basis

InterAcct Demo - [EMPLOYEE DAILY PERFORMANCE - display, John Hibbon]

File Record Edit View Go Advanced Menu Graph Design Help

Date	Thu 13-Mar-2014	Employee	JOHN.H	Names #	5
	Target		Actual		Variences
Sales \$	3,000.00	Sales \$	3,500.00	Var Sales \$	500.00
Gross Profit	1,000.00	GP \$	985.00	Var GP \$	-15.00
		Performance %	-2	Var GP%	-5.19
Quotes \$	10,000.00	Quotes \$	12,500.00	Var Quotes \$	2,500.00
Activities					
Initial #	7	Initial #	5	Initial #	-2
Phone #	10	Phone #	11	Phone #	1
Mail #	3	Mail #	0	Eyeball #	1
Eyeball #	1	Eyeball #	2	Mail #	-3
Quotes #	2	Quotes #	3	Quotes #	1
Timesheets					
Charged #	0.00	Charged #	0.00	Charged #	0.00
Non Charged #	0.00	N/Charged #	0.00	N/Charged #	0.00
Written Off #	0.00	W/Off #	0.00	W/Off #	0.00
		Hrs %	0		
Charge \$	0.00	Charge \$	0.00	Var Chg \$	0.00
Profit	0.00	Profit	0.00	Profit	0.00
		Charged %	0	Jobs #	0
Pft Share \$	200.00	Comm Rec \$	197.00		

Form help | Field help

This is a non input enquiry screen. It is updated automatically from the Employee Target input file(s), plus the InterAcct Accounting system, and Contact History files.



InterAcct Pricing (Per User)

Users	Base InterAcct	Job Costing, Estimating, Quoting (A)	Costing by Phase (B)	Building Repairs, Insurance Claims (C)
1	\$1,650 (15-25)	+ \$550 (10)	+ \$385 (5)	+ \$275 (2-3)
2-3	\$1,100 (20-30)	+ \$550 (10)	+ \$385 (5)	+ \$275 (2-3)
4	\$825 (20-30)	+ \$413 (10)	+ \$275 (5-8)	+ \$207 (2-3)
5-9	\$660 (25-35)	+ \$330 (10-15)	+ \$220 (5-8)	+ \$165 (3-5)
10-19	\$550 (30-40)	+ \$303 (10-15)	+ \$193 (5-8)	+ \$138 (3-5)
20-49	\$440 (40-60)	+ \$275 (10-15)	+ \$165 (10-15)	+ \$110 (3-5)
50+	\$385 (50-75)	+ \$253 (15-25)	+ \$143 (10-20)	+ \$99 (5-10)

Software Pricing

Software Pricing is per Computer Network "User" as defined in the above table. The optional software modules (e.g. Job Cost Estimating) require the Base InterAcct as well, and are purchased based on the number of base Network Users. Prices are all ex GST.

+ Annual Support Pricing

Yearly support is calculated at 20% of purchase price, with no CPI annual increases. Support is reduced by 30% after 3 years. For example a single User (with just the base InterAcct) would be $(\$1,650 \times 20\%) = \330

+ Implementation & Training Budget

The (Number) denotes the estimated min/max hours of Implementation & Training required in the budget per installation / module (not per User). Implementation / training "Advanced" is currently charged at the average rate of \$180 per hour.

Modules

There is a wide variety of software modules available for purchase, talk to InterAcct staff about your specific software needs.

Request a Cost Estimate:

InterAcct Software Pty Ltd

Toll Free: 1300 66 26 26

Email: sales@interacct.com.au

Web: <http://www.interacct.com.au>