



**Business Management System**

## CALENDAR MANAGEMENT

- ▶ View all employees' schedules or just your own
- ▶ Stay current with appointments and professional and personal "To Do"s
- ▶ Set reminders for follow-up calls or to send Thank-You notes
- ▶ View staff availability at a glance for easy scheduling

## CUSTOMER MANAGEMENT

- ▶ Organize your entire customer database, including Business Affiliates and their customers
- ▶ Keep records of all communications with your customers
- ▶ Send or print coupons right from customer record
- ▶ View all customer activity
- ▶ Sort matches to eliminate duplicate records

## PROJECT MANAGEMENT

- ▶ Track profitability of projects
- ▶ Track the status of all projects from Inquiry to Completed/Installed
- ▶ View details of your customers' previous projects and add details for next project
- ▶ Add breakdown of costs for each project

## MARKETING MANAGEMENT

- ▶ Manage your marketing efforts to client database
- ▶ Track leads by Media Source and analyze marketing efforts
- ▶ View where each customer is in the selling process
- ▶ Manage your Marketing folders

## SALES MANAGEMENT

- ▶ Set staff and store sales goal
- ▶ Track your business' monthly and YTD sales
- ▶ Create list of Pending Sales to follow up
- ▶ Monitor average sale and average percent gross profit

## REPORTING

- ▶ Media Source
- ▶ Referrals
- ▶ Close ratio and average sale
- ▶ Print labels
- ▶ And more...