eSales BI

AUTOLOGUE
COMPUTER SYSTEMS, INC.

BUSINESS INTELLIGENCE
CRM – ABOUT THE CUSTOMER
INTERACTIVE DASHBOARD

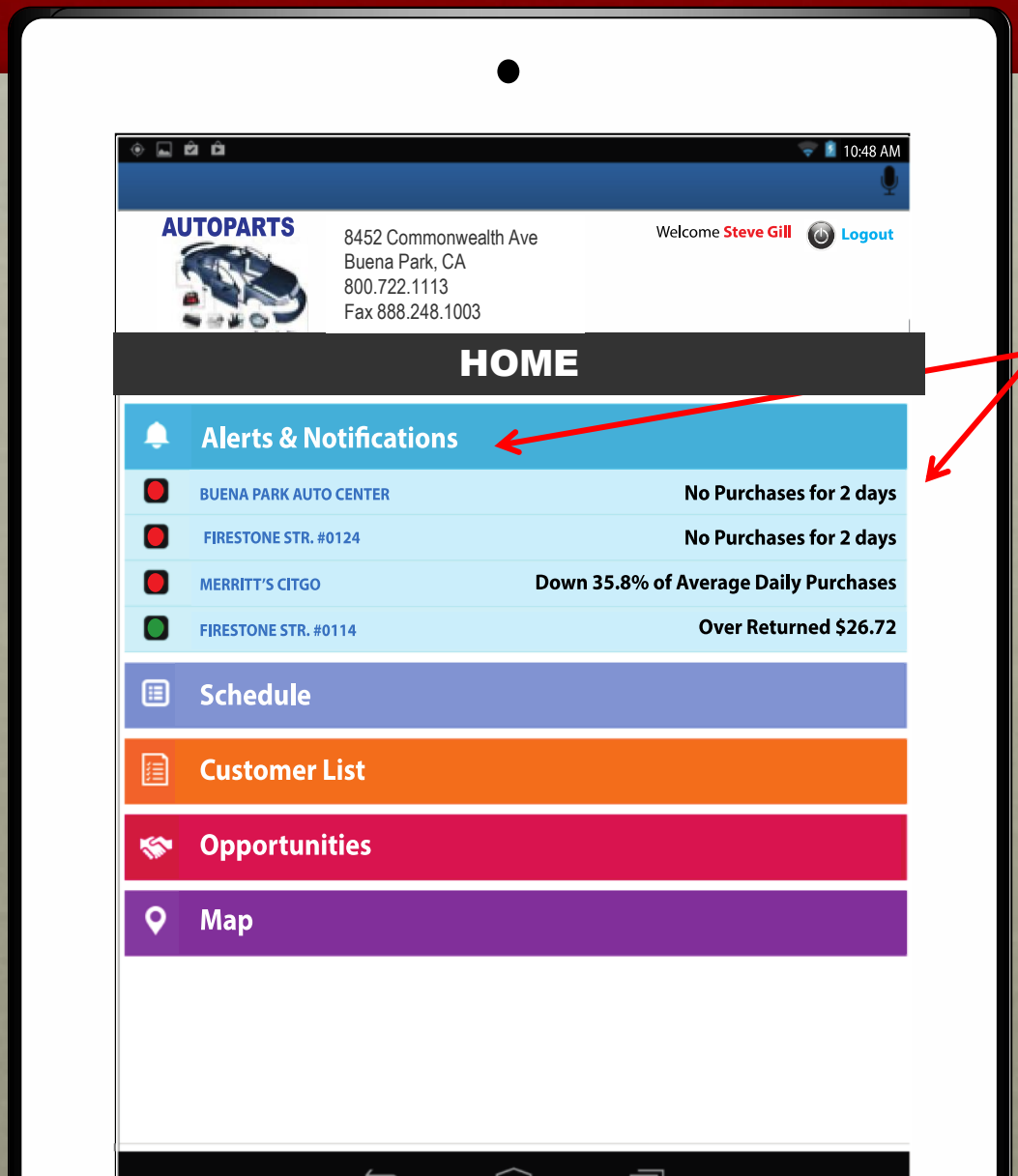
eSales BI GOmobile

Salesperson's Dream Come True

...all in the palm of your hand.

AUTOLOGUE
COMPUTER SYSTEMS, INC.

Salesperson's Home Page

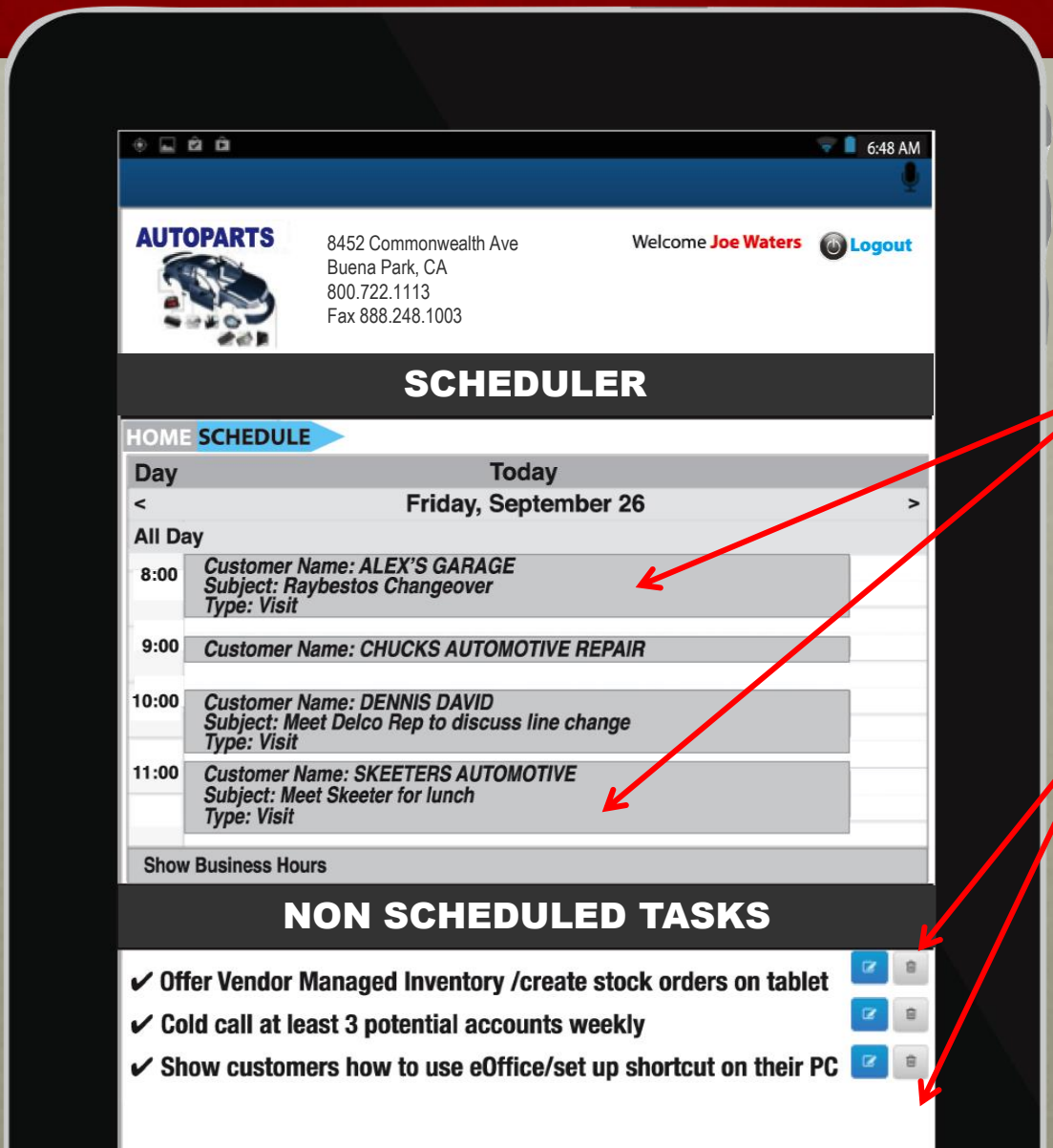


View Alerts AND Notifications

(user defined parameters)

- Alerts and Notifications parameters defined by management
- Quick Search to access Customer's detailed information, ie., Business Intelligence, Notes, CRM: About the Customer, etc.
- Secure Login with easy access to each salesperson's customer's information

Salesperson's Scheduler

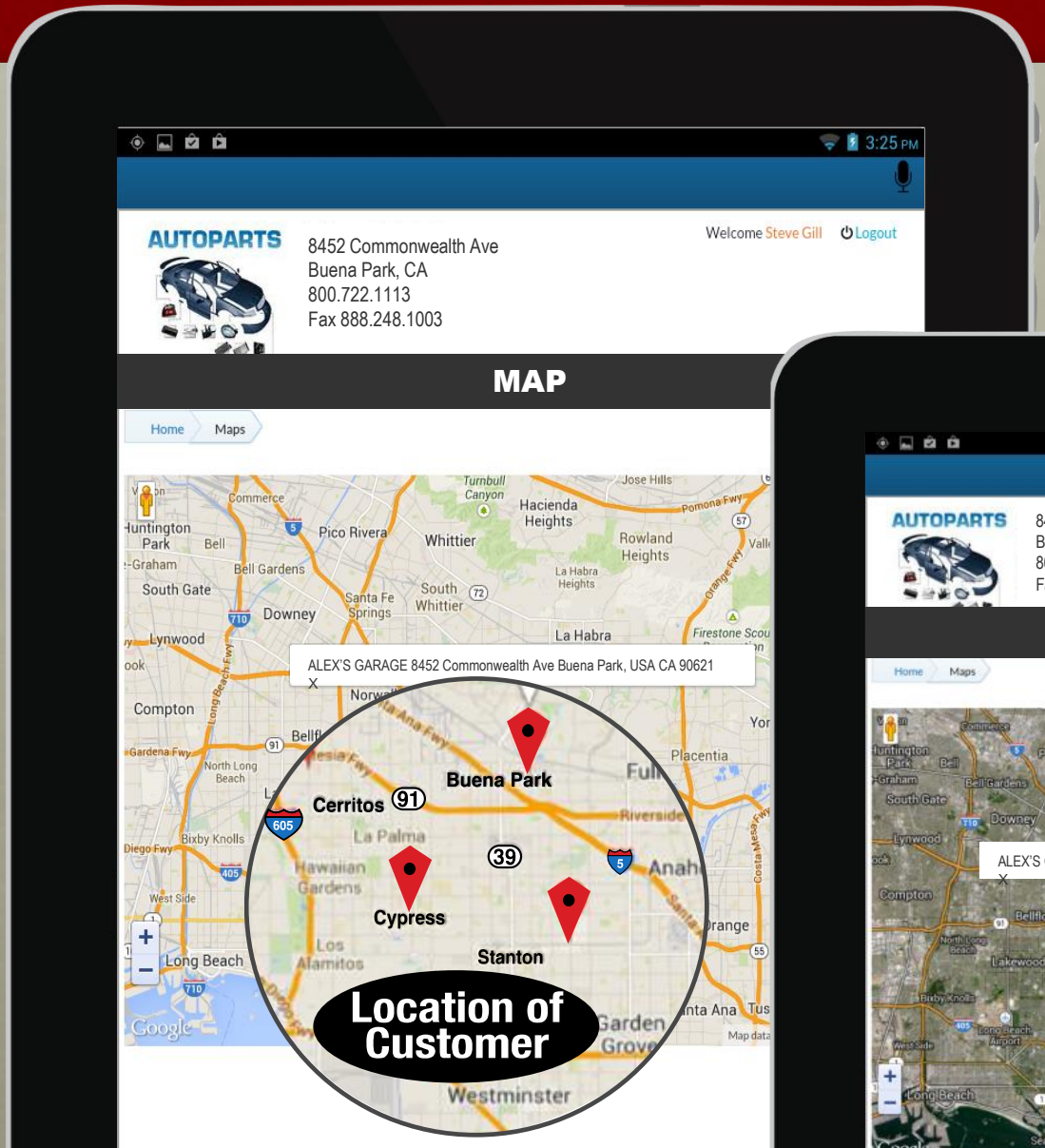


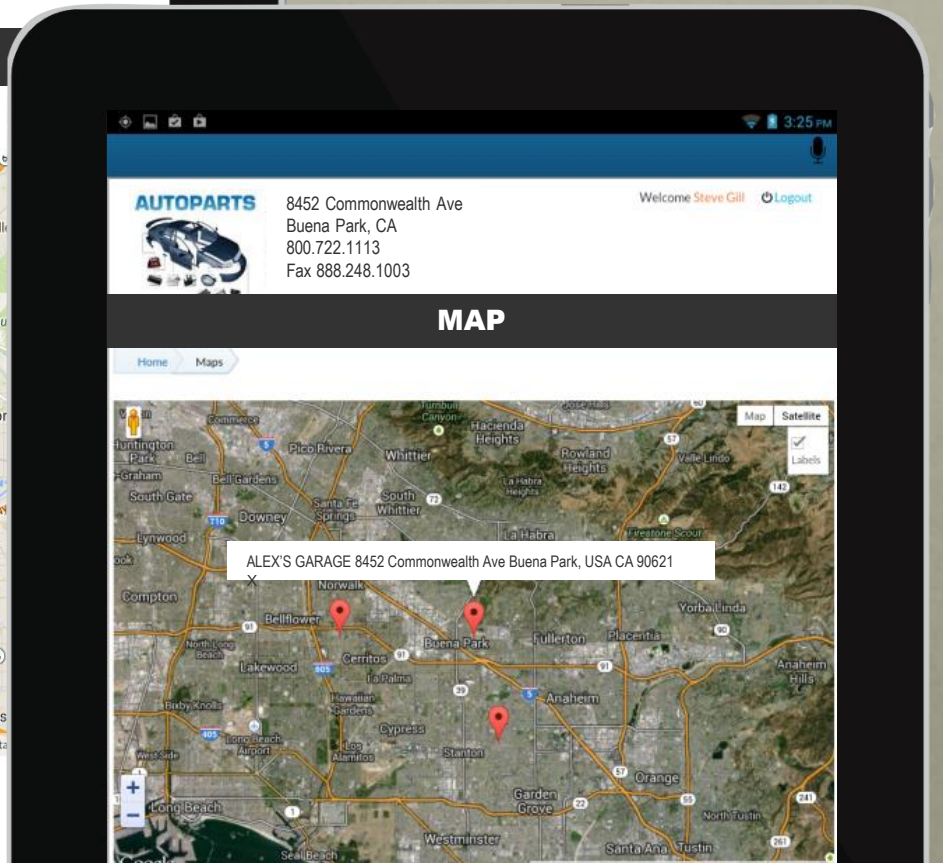
- Organize Daily, Weekly and Recurring Calls, Appointments and Visits

All Schedule entries hyperlink to Customer Navigation page

Non time/date sensitive "TO DO's"

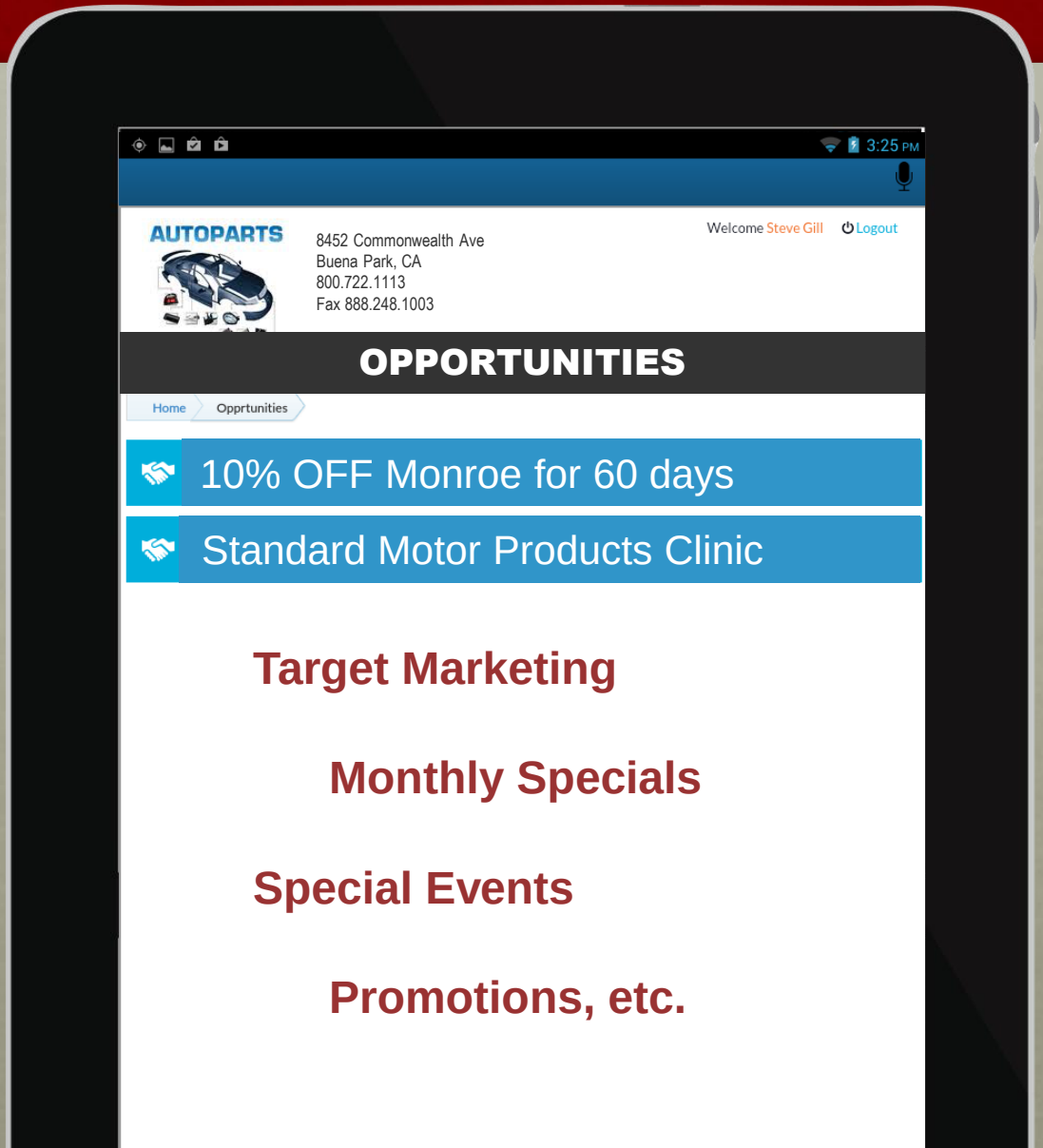
Appointments for Today





- ✓ Plan your Route with the Map linked to the Scheduler
- ✓ Map and Satellite Views

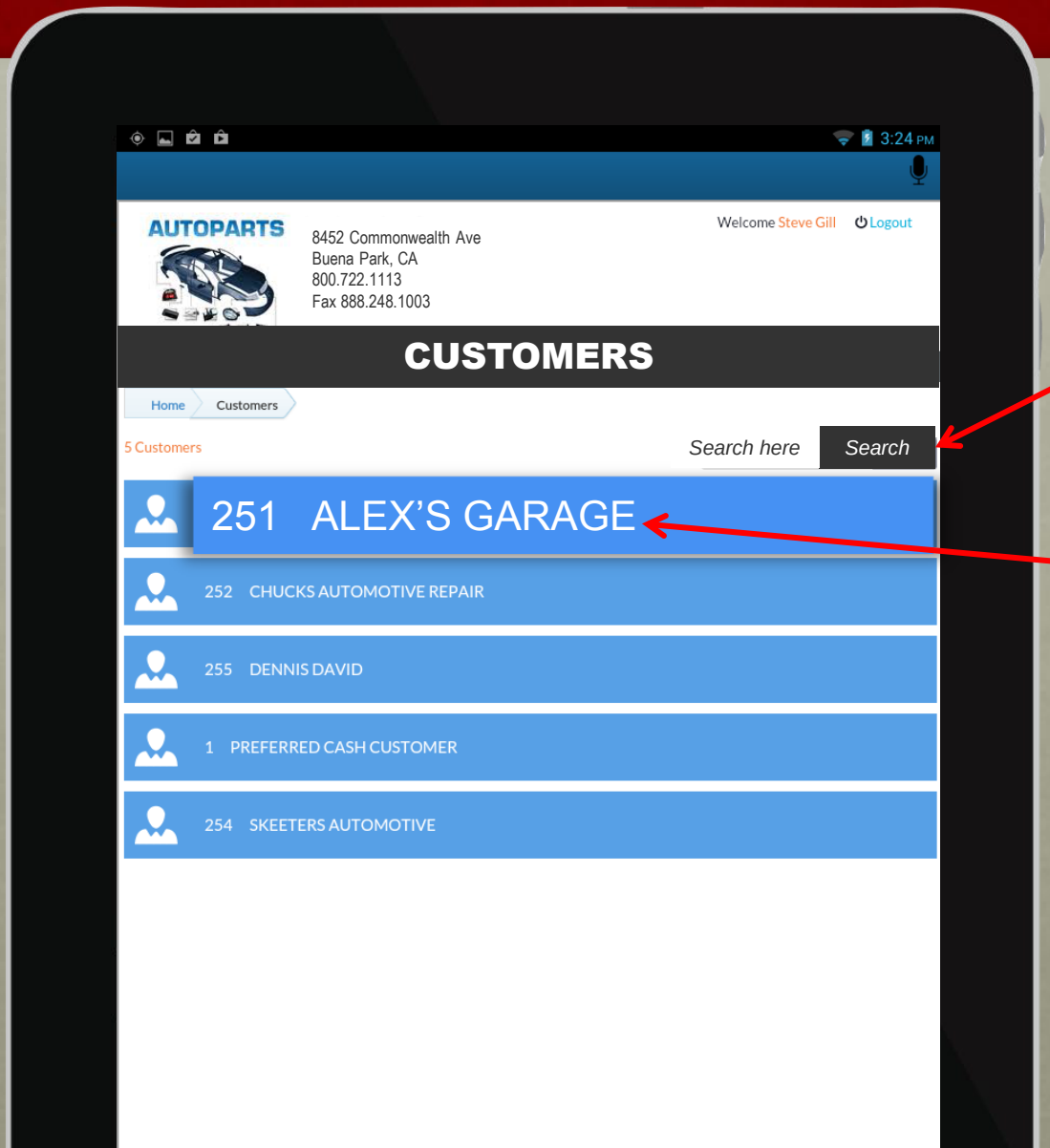
Sales Campaigns: Opportunities



Online access to:

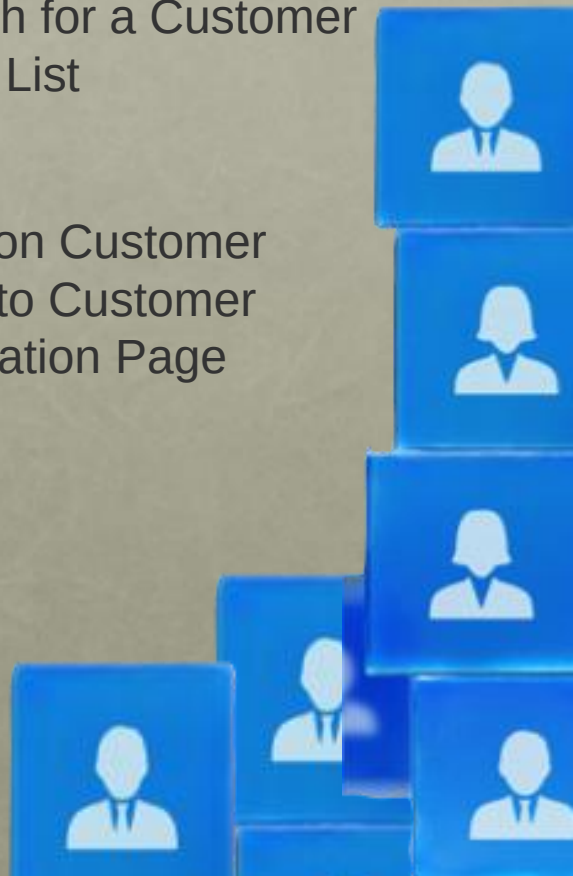
- ✓ Company Information
- ✓ Instructional Documents
- ✓ Vendor Information
- ✓ Websites
- ✓ Company Announcements

Salesperson's Customer List

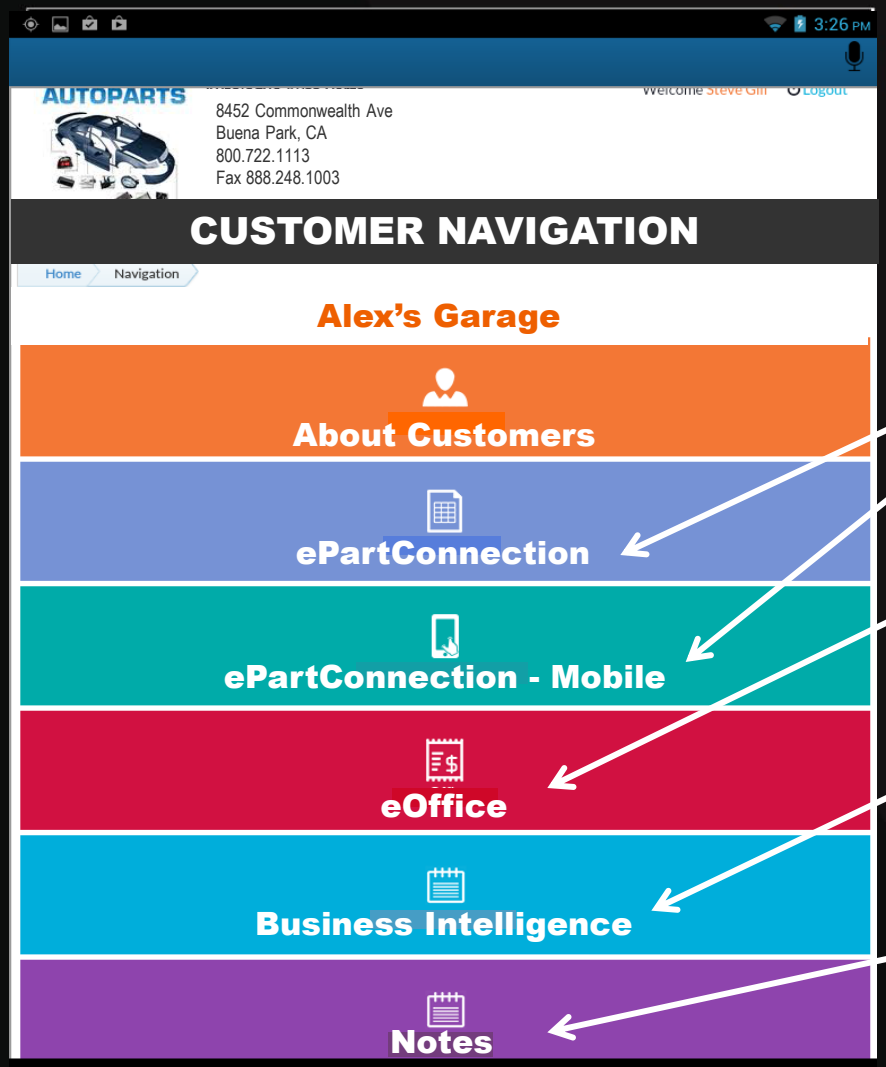


Search for a Customer in the List

Click on Customer to go to Customer Navigation Page



Customer Navigation Page



Individual Customer Navigation Page provides direct access.

Direct link to: ePartConnection

WEB AND MOBILE

Place stock orders, vendor manage inventory directly to Management System.

Direct link to: eOffice

View invoices, credits, statements and pay your bill on line.

Direct link to: eAnalysis

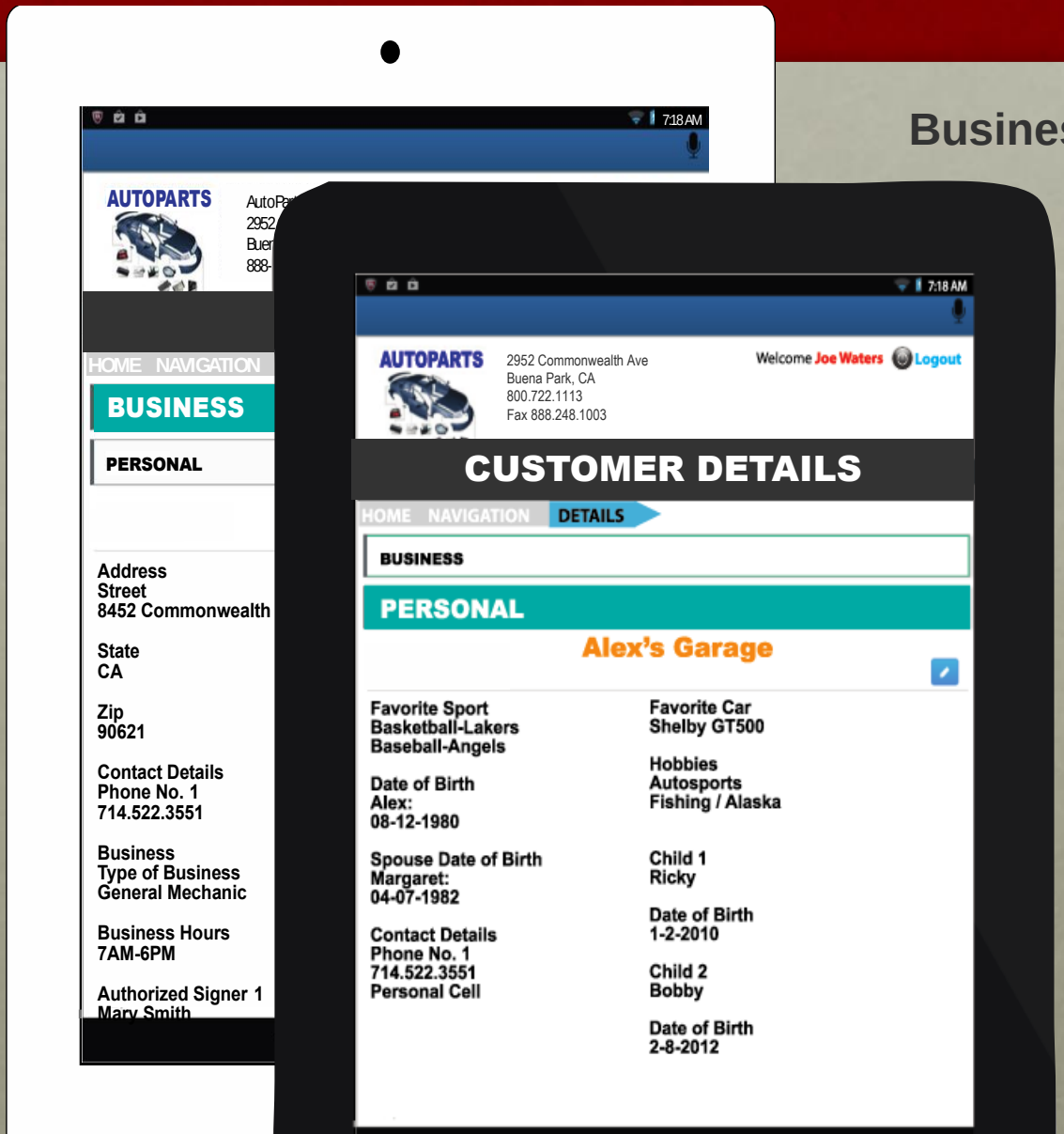
BUSINESS INTELLIGENCE

View month to date, year-to-date and product line performance.

Direct link to: eNotes

Use voice recognition to record notes for each visit.

CRM: About the Customer



Business and Personal Information

- Build and strengthen your customer relationship/loyalty by capturing their business and personal information
- A 360 degree view of your customer's personal favorites: Sports, Hobbies, Cars, plus Family Birthday reminders
- Key business info: Business Hours, Type of Business, Authorized Buyers, and Brand Preference

Direct Connection REAL TIME to your Management System

Vendor Managed Inventory (VMI)

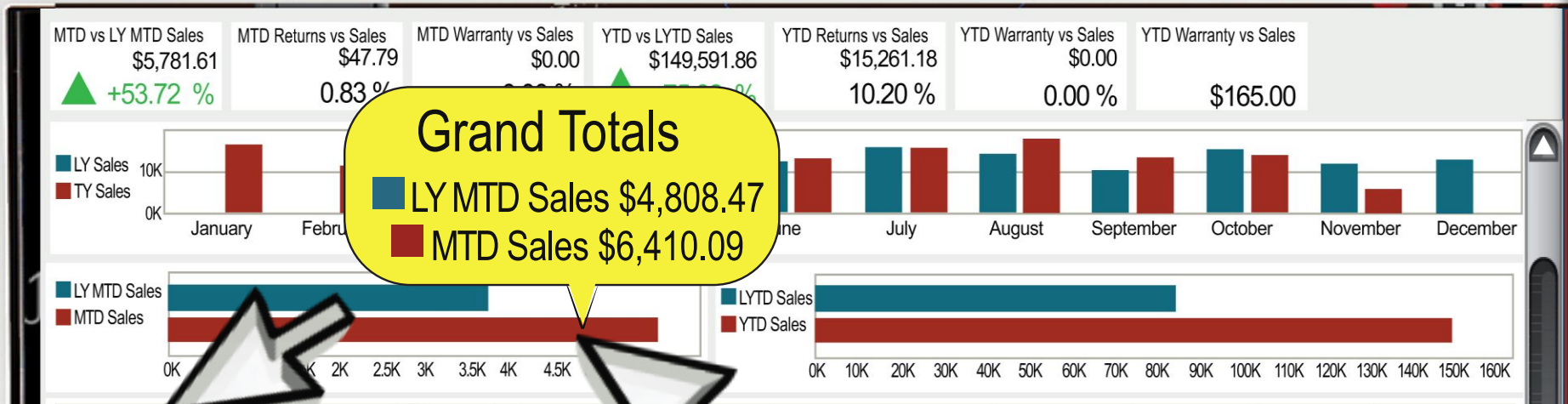
- Stock Orders
- Check Stock
- Catalog Parts Lookup
- Non-Cataloged Parts

Orders go directly to the Printer!

BI Dashboard

Interactive Business Intelligence
MTD and YTD Sales Comparisons
by Line and Product Group

ABC Auto Parts Inc. Customer 251 – ALEX'S GARAGE



PL Group	LY MTD	MTD	Change	MTD Returns	MTD Warranty	LYTD	YTD	Change	YTD Returns	YTD Warranty	YTD Core Outstanding
Brakes	$6.43	$0.00	-100.00% ▼	$0.00	$0.00	$685.69	$338.93	-50.57% ▼	$125.00	$0.00	$165.00
Cooling	$0.00	$0.00	0.00%	$0.00	$0.00	$33.05	$96.53	+192.07% ▲	$0.00	$0.00	$0.00
Ignition	$0.00	$14.49	0.00% ▲	$0.00	$0.00	$138.49	$128.52	-7.20% ▼	$0.00	$0.00	$0.00
Engine	$0.00	$0.00	0.00%	$0.00	$0.00	$180.98	$110.47	-38.96% ▼	$0.00	$0.00	$0.00
ACP	$7.69	$10.36	+34.72% ▲	$0.00	$0.00	$282.30	$733.08	+159.68% ▲	$0.00	$0.00	$0.00
ADV	$0.00	$0.00	0.00%	$0.00	$0.00	$684.78	$665.09	-2.88% ▼	$18.99	$0.00	$0.00
AFP	$0.00	$0.00	0.00%	$0.00	$0.00	$36.98	$55.86	+51.05% ▲	$0.00	$0.00	$0.00
AGS	$0.00	$0.00	0.00%	$0.00	$0.00	$36.74	$181.99	+395.35% ▲	$0.00	$0.00	$0.00
AIF	$0.91	$330.34	+36201.10% ▲	$0.00	$0.00	$3,990.74	$7,259.18	+81.90% ▲	$1,176.84	$0.00	$0.00

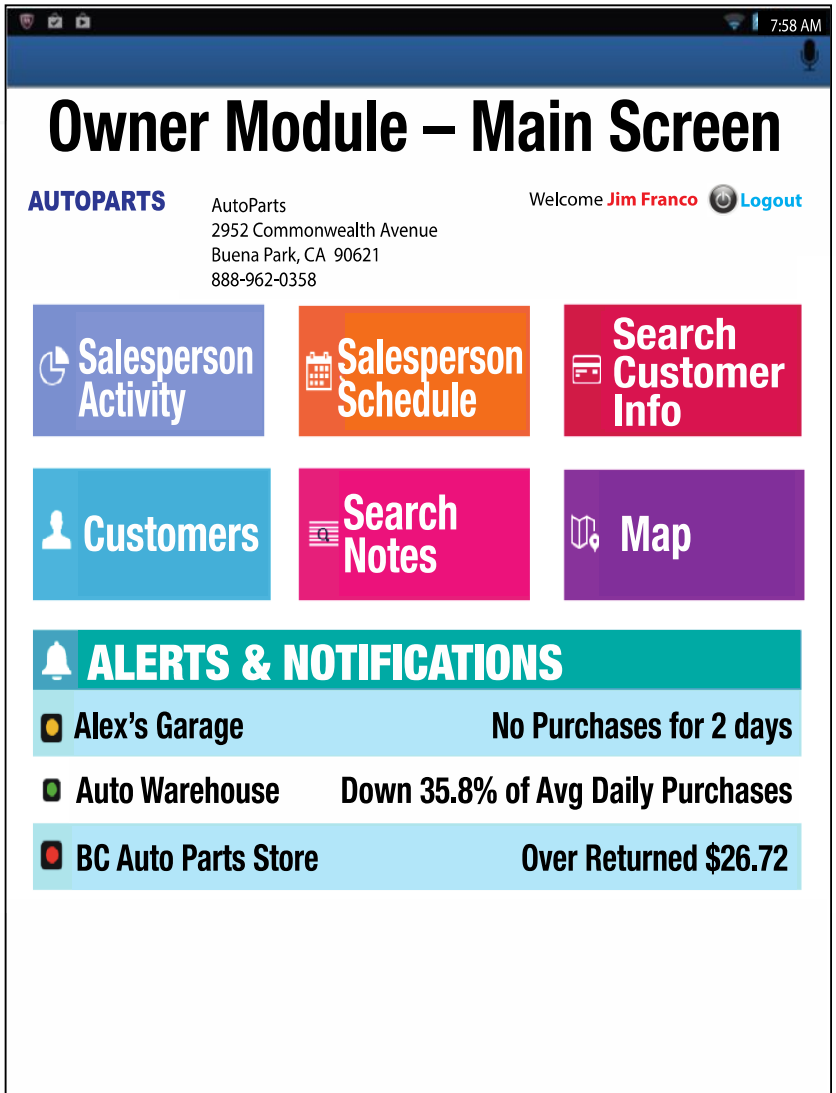
Customer Notes

Monitor Salesperson Productivity

- Time and date stamped
- Take and store customer notes to enhance credibility
- Save all notes to reference action items to ensure customer satisfaction.

"Get the job done!"

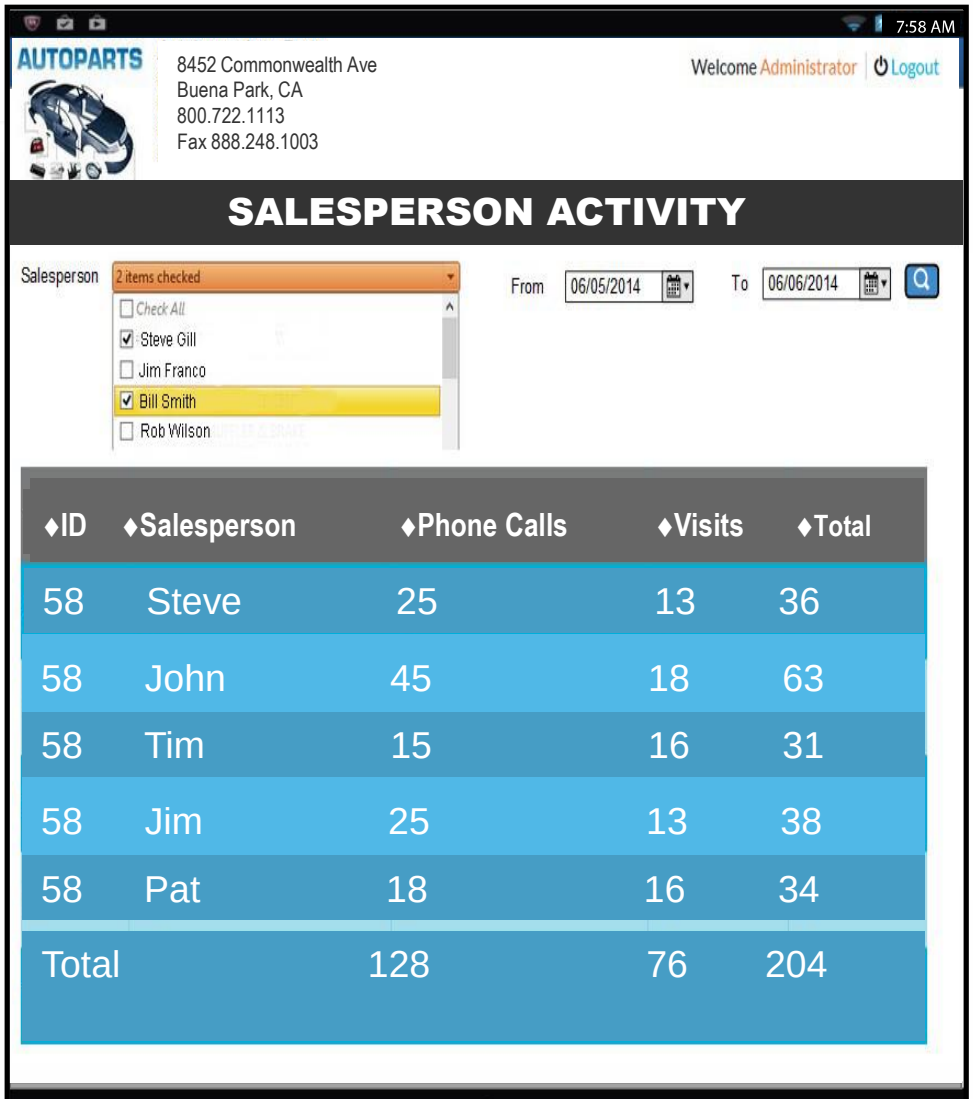
Owner Module: Main Screen



- Global Access to all Salesperson Sales Activity – Calls & Visits
- View progress of salesperson's appointments: Daily, Weekly and Monthly
- Search by Single Field Entry: Sports, Birthdays, Business type, etc.
- View all Sales/Goals by Salesperson, including Notes by date
- GPS Tracking shows time and duration of salesperson's visit to each customer.

Integrates to all major Management Systems

Salesperson Activity



♦ID	♦Salesperson	♦Phone Calls	♦Visits	♦Total
58	Steve	25	13	36
58	John	45	18	63
58	Tim	15	16	31
58	Jim	25	13	38
58	Pat	18	16	34
Total		128	76	204

View ***ALL*** Scheduled Calls and Visits by Salesperson.

Calls Drilldown by Salesperson

7:58 AM

AUTOPARTS

8452 Commonwealth Ave
Buena Park, CA
800.722.1113
Fax 888.248.1003

Welcome Administrator | Logout

PHONE CALLS

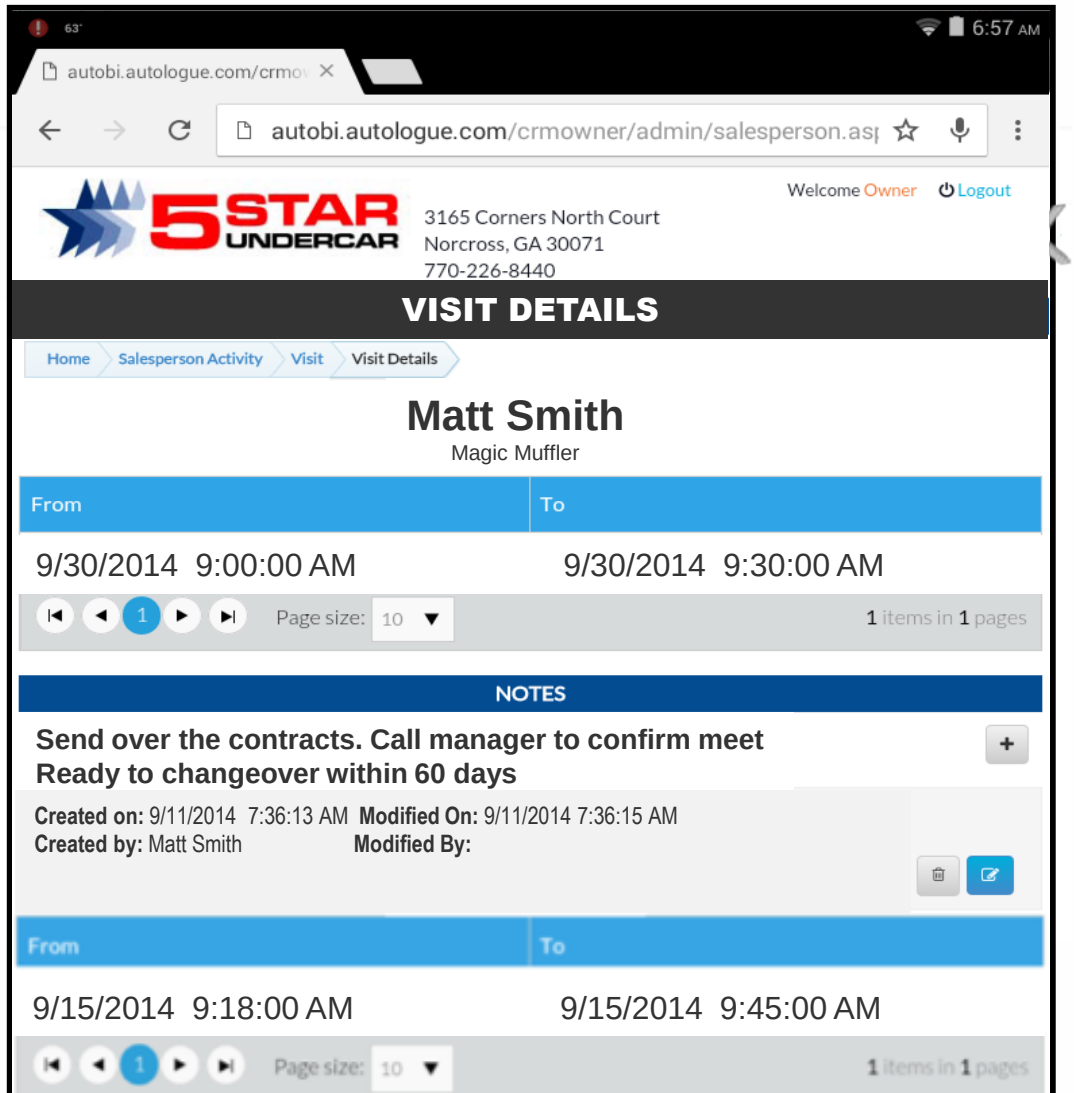
Salesperson Activity | Phone Calls

John Doe

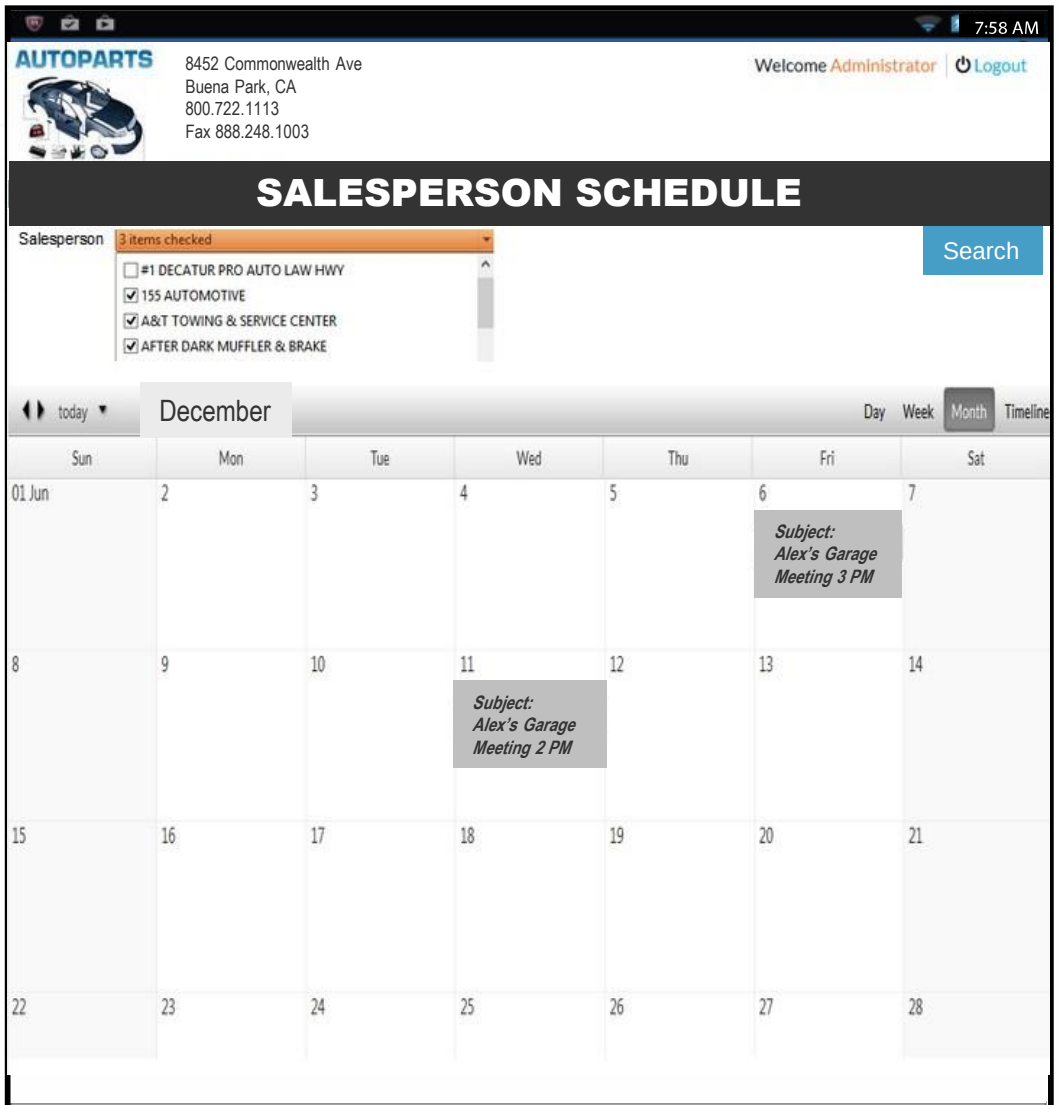
♦ID	♦Customer	♦Phone Calls
58	Skeeters	2
58	Chucks	5
58	Alex	8
58	Preferred	12
Total		27

View ***ALL*** Calls for a Salesperson by Customer

Calls with Notes



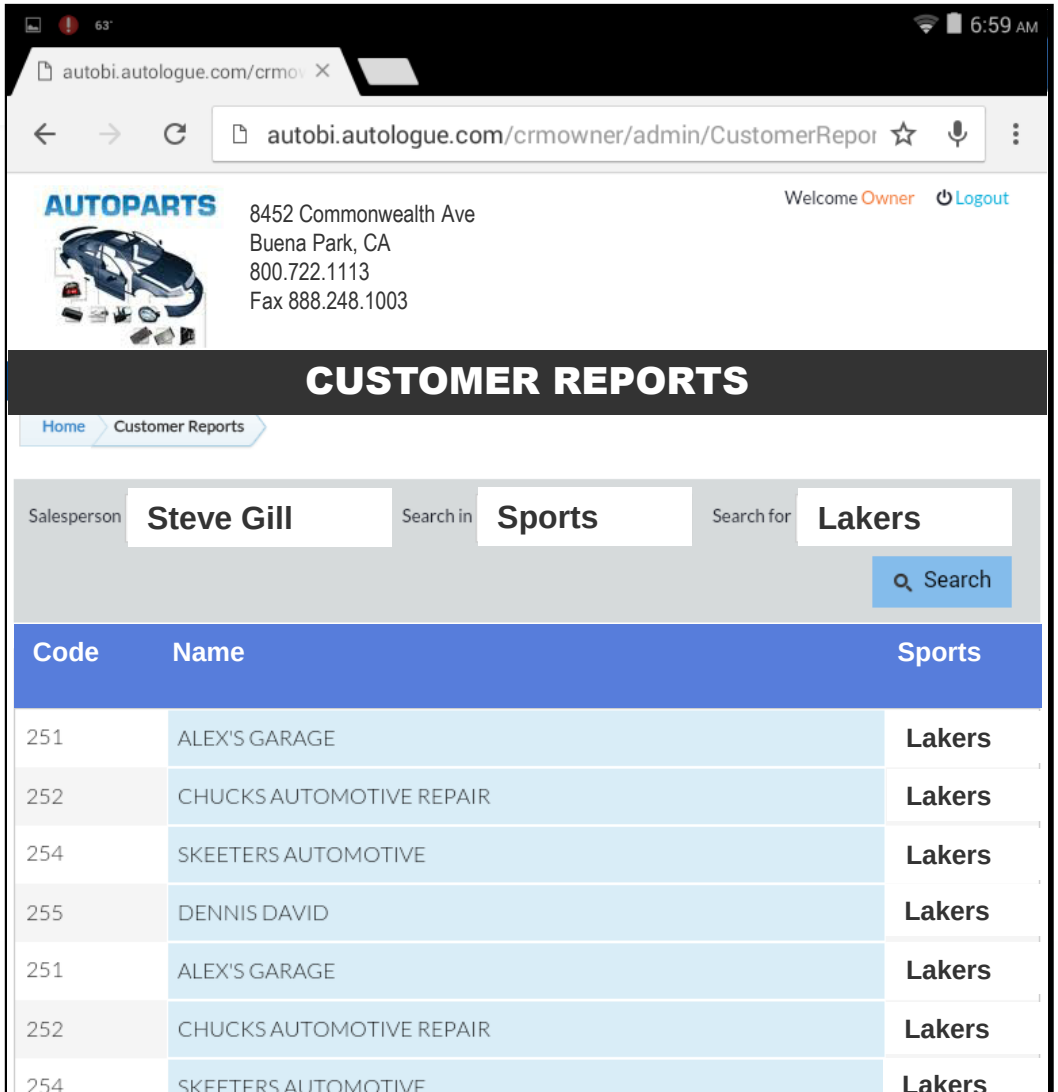
Salesperson Schedules



View *ALL* Appointments on Schedule for Any and All Salespeople

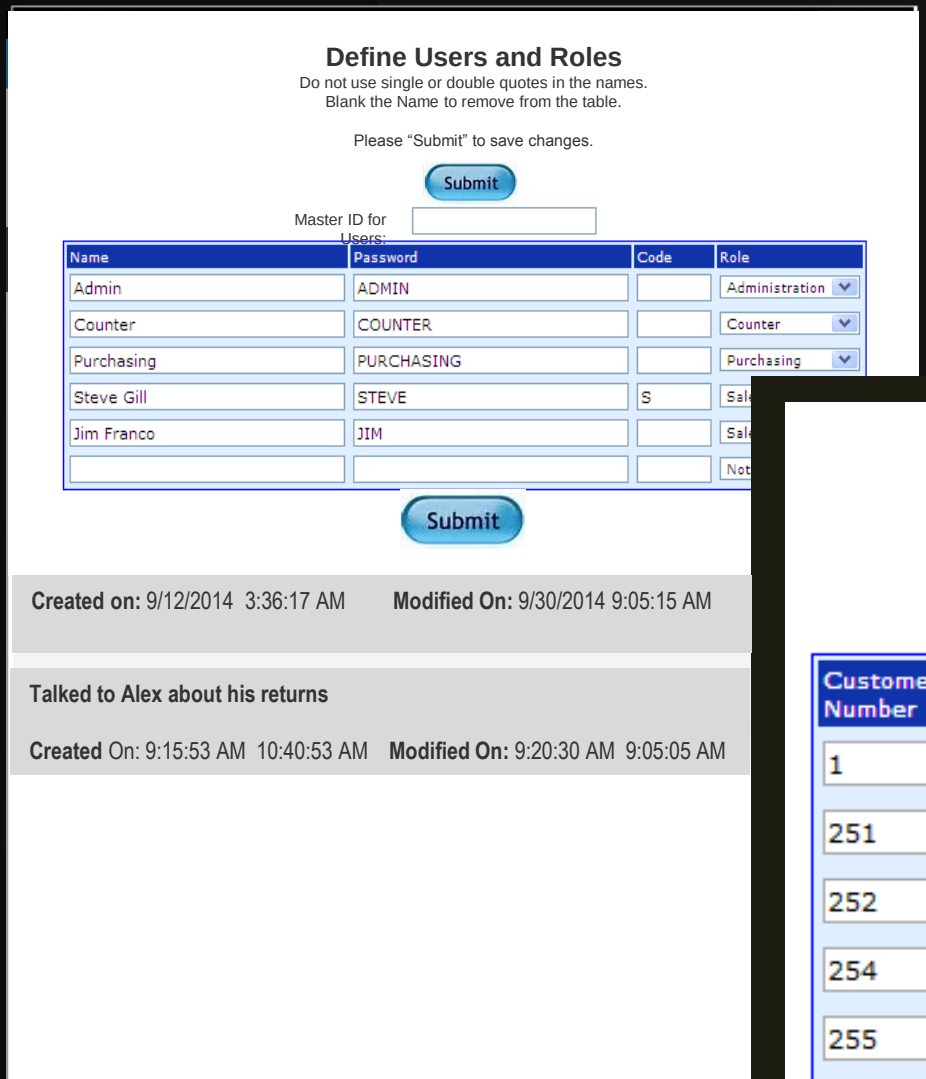
Track ***ALL*** Salespeople for a Day, Week or Month

Search Customer Info



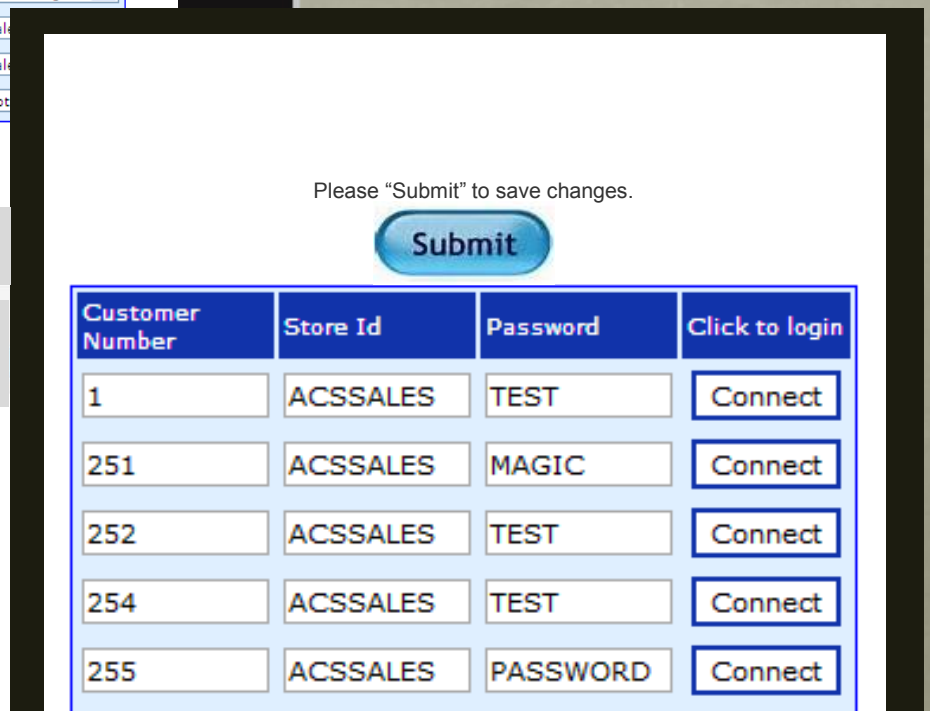
Search Customer Information by Individual Field Entry (i.e., Favorite Sports, Hobbies, Birthdays-Spouse, or Children, Anniversaries, Business Type, Hours, etc.)

Let's Set Up · Define Users

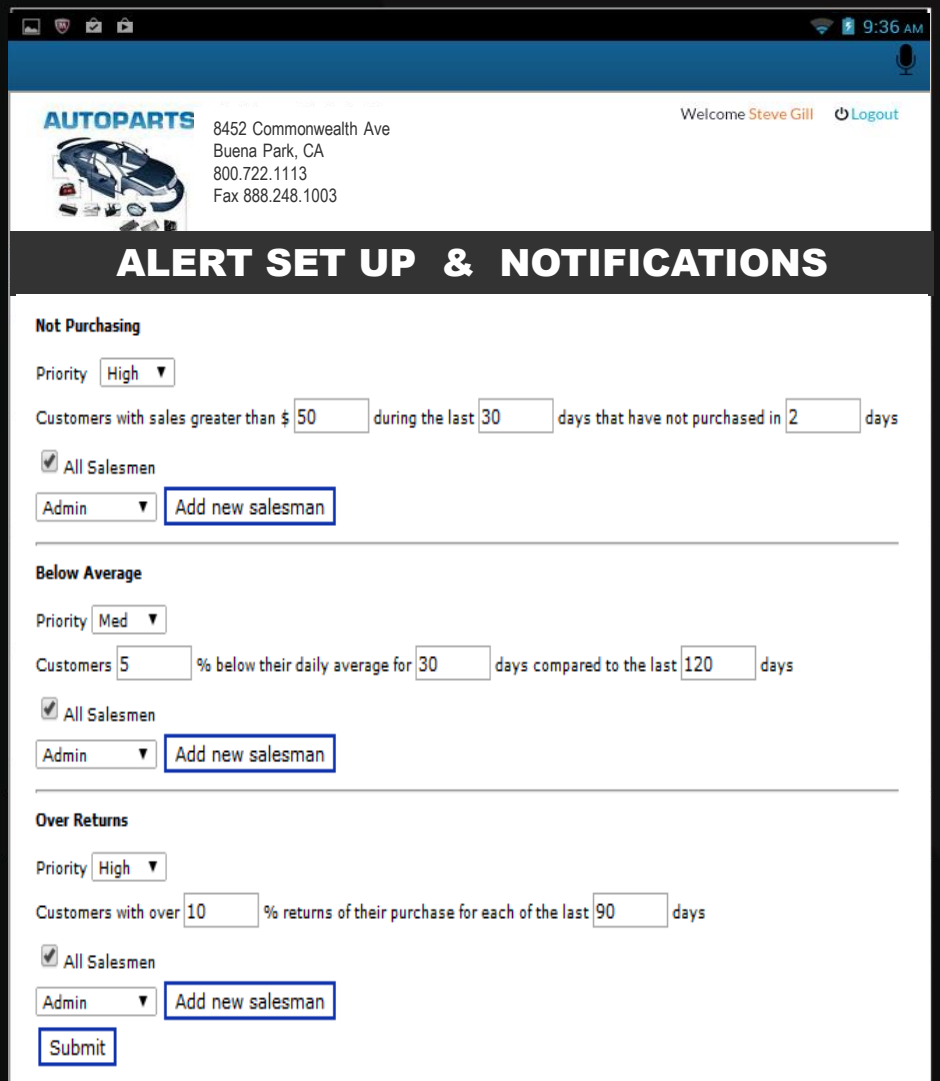


Getting Started

- Define Users
- Customer List by Salesman



Alert Setup & Notifications



(Setup Continued)

Alert Setup

- User Defined
- By Salesperson or group

Notifications

- Free Form text field from Management

Business Intelligence Tools are Key To Increase Profits

- Increase sales using **“fact-based” selling tools**
- **Build profits** by targeting profitable activities
- Increase customer loyalty and **retain customers** for life
- **Increase the accuracy** and timeliness of sales forecasts
- **Achieve** budgeted sales
- Increase the proportion of high-value customers in your customer mix
- **Deploy** higher-yield promotions and advertising
- **Predict** future behavior of customers

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USED BY THE PROS

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