

SalesNotes.net



Relationship management for the growing enterprise

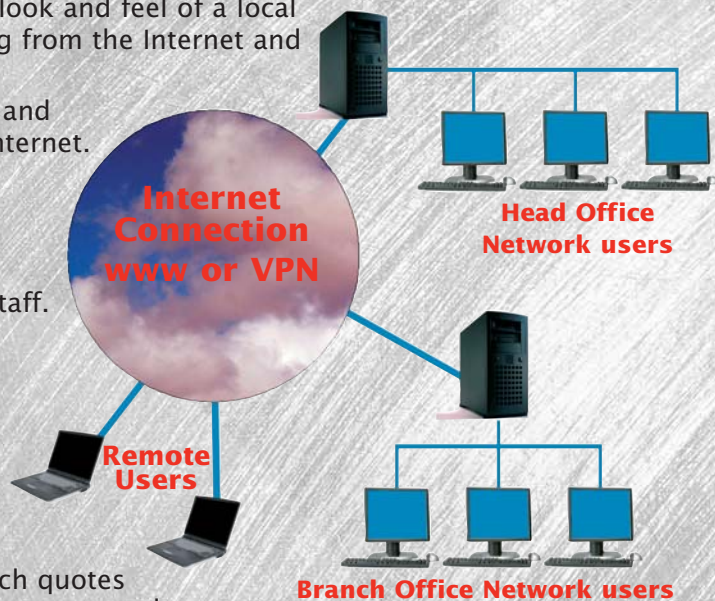
SalesNotes.net™ is designed for the smaller company selling business to business. It offers a high performance customer relationship and contact management system for sharing and handling customer information and documents but without the on-site installation costs. Supplied either as a hosted service via the internet or installed on your own server. SalesNotes is a cost effective solution, very quick to deploy and fully scalable. Unlike other net based CRM products it provides the look and feel of a local application even when running from the Internet and works online or offline.

SalesNotes users can access and share customer data via the internet. Head office can instantly see letters quotes and actions generated by remote staff or offices. Internal telesales can generate calls for field sales staff.

The perfect solution for the dispersed sales force.

Key Features:

- Intuitive interface
- Action and opportunity Management and tracking
- Track correspondence, attach quotes letters and emails to the contact record
- Search and report on ANY field using the report writer and export to MS Word and Excel. Onscreen reporting from the overview screen
- Diary and Scheduler
- Synchronisation of data with MS Outlook
- Create template letters, mail shots and Email-shots with full merge of data using MS Office
- All screens in the system are user customisable for view and screen text
- Communicate with colleagues using Instant Messaging



Data overview and reporting

SalesNotes gives you a filtered snapshot of your data. Customise to give the appropriate view of your business and print straight from the screen! The status of all accounts and opportunities can be reviewed from the overview screen.

Click on an individual record to take you to the details page.

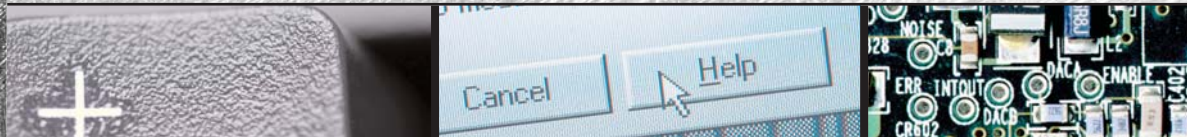
Reports can be easily produced at the touch of a button, use either a standard report format or create your own using the report wizard. Any field can

be incorporated to give you flexible and powerful reporting. Whether you want to analyse the results of a recent mailshot or produce your end of month sales forecast for the next Board meeting, **SalesNotes** delivers the right information to write a professional report in a matter of minutes.

The screenshot shows the SalesNotes application interface. At the top, there are navigation tabs: Home, Sales Stage, Company, Contact, Opportunity, Actions, Orders, Sales Status. Below these are search filters for Opportunity Source, Country, and Sales Person. A table displays data with columns for Company, Contact, Opportunity Ref, Opportunity Date, Sales Stage, Value, and Probability. A callout box points to the filter area with the text: 'Apply filters to the view on the data and report on screen'. Another callout box points to the table with the text: 'Customise the table view to suit your needs'.

Company	Contact	Opportunity Ref	Opportunity Date	Sales Stage	Value	Probability
ASD Technology Ltd	Mr Sean O'Connell	109	09/01/2004	04 Established New	8000	54.58
Aspic Ltd	Pauline Congan	106	18/06/2004	06 Proposal Submitted	18.82	0
Car and Driving	Ms Sarah Stephenson	62	11/12/2003	02 Interest Shown	8520	85.56
Keays Ltd	Dr. Paul Walsh	80	01/05/2004	02 Interest Shown	18920	77.78
IT Architecture	Mr Alan Farman	105	24/05/2004	06 Proposal Submitted	520	0
MI International Limited	Ms Niki Torrance	111	01/12/2004	03 Met Decision Makers	3000	0
MI International Limited	Ms Niki Torrance	113	02/12/2004		3000	0
Hedwin-IT (UK) Limited	Mr Julian Russell	104	01/06/2004	03 Met Decision Makers	700	64.55
Online Services Ltd	Van Derweerd	REF-66	01/05/2004	01 Met Qualification	0	11.11
Optic Ltd	Mr Steve Evans	112	01/12/2004	06 Proposal Submitted	1080	72.73
Ornl Securities Ltd	Mr David Ault	68	12/06/2004	05 Demonstration	536	54.55
PH Harley Ltd	Mr Nigel Pridson	59	12/02/2004	04 Established New	700	64.55
Piper Communications	Mr Tony Argento	102	23/12/2003	06 Completed	0	0
Shakespeare Books Ltd	Mr Kevin Barry	41	25/02/04	02 Interest Shown	0	0
Speakers' Options	Miss Ellen White	32	01/07/2004	04 Established New	0	0
Tenaris UK Ltd	Mr Jonathan Price	REF-64	18/07/2003	02 Interest Shown	0	0
Wespa Gel AB	Mr Otto Olsberg	108	17/06/2004	03 Met Decision Makers	2000	72.73

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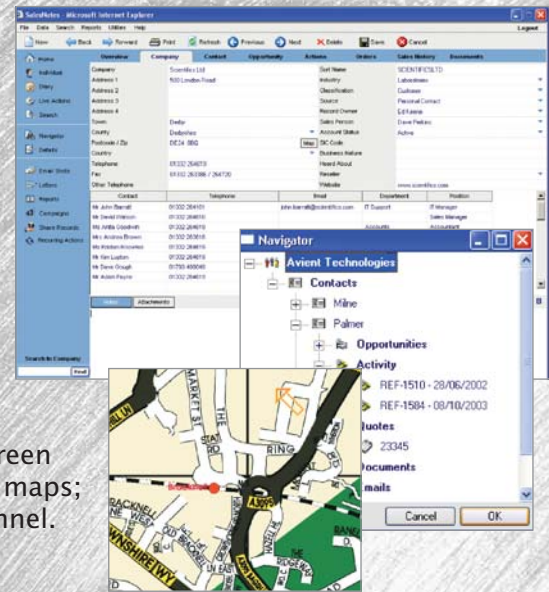
Accounts and Contact Information

The **SalesNotes** accounts screen retains all the company information with hyperlinks to the contact records for all the actions, relationship activities and correspondence. Attach notes and documents for sharing throughout your organisation.

Easy to use pop up screens guide you round the database with search functions and customisable screens.

The Account Navigator™ pop-up screen shows the overview on all the interactions with your customer.

The additional geographical information screen offers information with has on line links to maps; invaluable for field sales and service personnel.

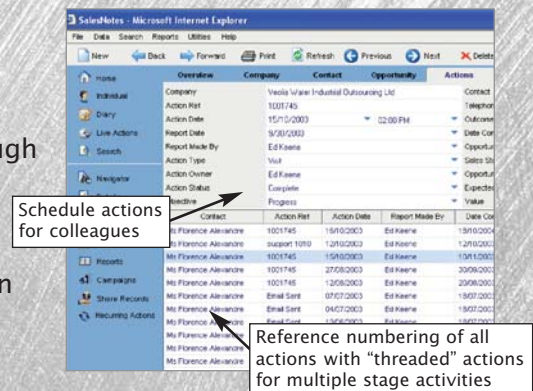


Actions, Opportunities and Campaign Management

SalesNotes stores all the notes, and documents relevant to the actions with your contacts.

A sales process can be applied and new enquiries tracked from initial inception through to completion. Quotes and actions can be linked with each opportunity and generated from the system in MS Word.

Using the filter selection wizard, companies can be selected as a group for targeted sales campaigns, promotions, mail shots sales and service calls.



Quotes, Invoices, Letters, emails & correspondence...& more!

SalesNotes automates the production of template letters quotes, orders and invoices. Discounts can be automatically calculated and quotation and order numbers generated and accurately logged against the appropriate contact.

The letters can be sent to a selected contact or alternatively as a mail shot to contacts in a sales campaign or from filters using the filter criteria wizard. All correspondence is stored in the central database and can be viewed instantly by other users.

Contact

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