Product Feature Sheets

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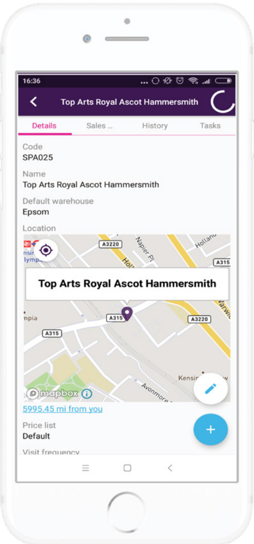
Customer History

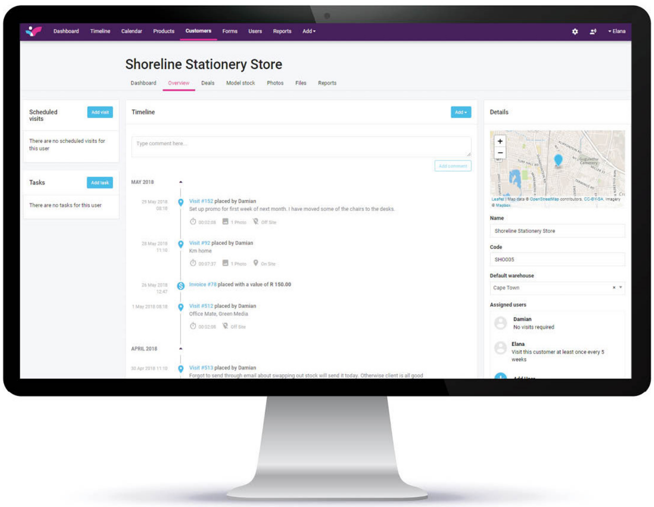


Know your customers

All customer details and history are in the palm of reps' hands, which means no more shifting through hand-written notes or searching for that email communication from months ago.

Customisable Customer Fields

You can add up to 250 customisable fields, such as:



- Contact information
- Visit frequency
- Sales rep/s associated to the customer
- Credit balances
- Amount outstanding
- Customer's industry
- Associated or nearest warehouse
- Pricelist associated to a customer

New info can be added / edited at any time and then instantly synced so that customer data is kept up-to-date on every reps' device and on the manager's web platform.

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Never walk in unprepared again

Complete customer visit history is available in one glance, which means sales reps can review the history of all interactions with the customer before starting a visit.

Reps can also get a more detailed overview of each section such as:

- Sales Overview
- Tasks associated to a customer
- Upload files – such as contracts
- The last date a customer was visited
- How many orders, quotes and credit requests a customer has placed
- Surveys completed at the customer
- Forms completed at the customer
- Stocked products
- Top ordered products
- Products a customer has never ordered