

# ContactTrack

## Contact and Customer Management Software

If your company has a sales element, then you realize how difficult it can be to effectively organize customer and prospect information among multiple salespeople. Plus, how do you make sure that your salespeople are meeting their quotas, calling enough prospects, and following up on a regular basis?

ContactTrack was written for the Sales Manager, President, or CEO that likes to keep their finger on the lifeline of their business. Your sales force can instantly access key customer information, along with comments, previous actions, and so much more. Contact Track also allows your sales force to manage activities, capture all customer communications, and track opportunities throughout the sales process



Custom Software Applications



### Digital Imaging Integration

ContractTrack is the only contact and customer management software available that is integrated with digital imaging software right out of the box. This allows your company to add images of proposals and signed contracts directly to the chosen record, as well as easy recall of past written documents with the click of a mouse!

### Track Your Sales Force

While many contact and customer management software packages are designed primarily for the sales person. Contact Track was built to manage the entire sales force. You get all of the functionality of contact software, with the additional reporting modules that any sales manager will love.

Check pipeline reports to see how much potential business has been proposed, or tabulate the number of cold calls made by each salesperson. Plan itineraries for your force or let them do it themselves. Know exactly where each customer is in the sales process without ever having to leave your desk...or waste your sales force's time by preparing weekly reports, taking them away from their primary task – sales.





# Contact Track

Track Your Customers  
Proposal Information

Territory Segmentation

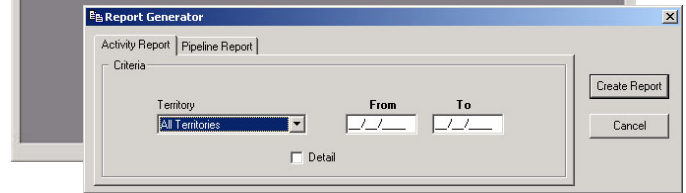
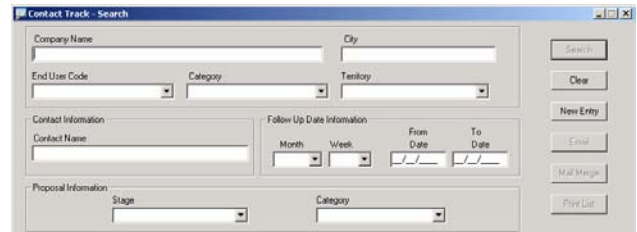
Lookups  
Activity Report

Task List  
Itinerary Creation  
Management Module

**Imaging Integration**  
Data base compatibility for MS SQL  
Server and MS Access

Keep track of every prospect through the entire sales process  
Know immediately what proposals are out there, how many, total dollar amount, and estimated closing dates for each  
Different salespersons have their own territories? Contact Track lets you handle it with ease  
Instantly find any important detail with robust lookup capabilities  
Track the activity of your entire sales force, broken down by salesperson and cold call, meeting, phone calls and more!  
Stay on top of important tasks and follow ups  
Plan your days in advance with scheduled meetings, calls, conferences  
You can create multiple reports to track your entire sales force and keep them selling instead of reporting  
Attach paper documents to contact pages to find contracts instantly  
Scaleable, so you can start modest now and expand as your budget allows.

**For more information about Contact Track or our other document management software, including digital imaging, call 800-644-7112 or visit [www.pdswest.com](http://www.pdswest.com).**



Activity Report (Summary)	
Dates	
11/02/2005 - 11/04/2005	
<b>B BROOKS</b>	
COLD CALL	32
FOLLOW UP	5
MEETINGS	5
PHONE CALL	1
<b>B CONINE</b>	
COLD CALL	23
FOLLOW UP	16
<b>LUIS</b>	
COLD CALL	5

**Supported Client Environments:**

- Windows 98
- Windows 2000 Professional
- Windows XP

**Minimum Client Requirements:**

Processor 700MHz or higher  
 Memory 128 megabytes of RAM, 256 Recommended  
 Display VGA or higher resolution monitor  
 Database MS SQL Server, MS Access, or any ODBC Compliant Database



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