



MARKETING DATABASE and SELLING SYSTEM

Scheduling A Fixed Time Interval For Customer Follow Up Reminders

Procedure S01; January 2008

www.customerfrontline.com

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This Customer Frontline™ (CFL) procedure shows you how to set a fixed time interval between scheduled follow up contacts with a customer. This setting should be entered when creating a new customer record. It can be changed at any time when editing a record.

Enter the number of days that you want Customer Frontline to count between reminders to follow up with this customer. For example, with five entered in this field Customer Frontline will include this record in your “Today’s Items” list five days after your last contact note is entered.

Full Name	Fred O. Gisnevich	None	11/05/2005	Customer #	GIS002
Bus/L Name	Gisnevich			S.A. #1*	XADS
Address	123 Main St.	County	WORCESTER	Promo*	
Address2		Country	USA	@L.C. Date	09/15/2007
City	South Lancaster	ST	MA	@N.C. Date	12/21/2100
Zip	01561				
Dear Fred		Cust. Type*	Weird	PnoType*	N/A
Spouse	Wilma	Rating*	-4	Source*	U
Phone 1	702/555-1212	Email	ads@rbsolution.com	Store*	U
Phone 2	/ -	Pianist		Trade?*	
				CFREQ	5
				Interests	0 Documents

Notice that the next contact date is the fifth business day after the date of this note entry. The next contact date can be manually set to any date you want by entering a different date manually or by selecting a date from the calendar utility.

Contact Note for Fred O. Gisnevich

User: Alan Slivinski Update Contact Dates

Date: 01/29/2008 Time: 10:46 am

Note: Q) Other

Stamp Note

Memo: This is a test.

Next Contact Date: 02/04/2008

Five business days between contacts.

This automated follow up option can be turned off for any customer record by deleting the number in the CFREQ field.

Questions & Comments

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