



## MARKETING DATABASE and SELLING SYSTEM

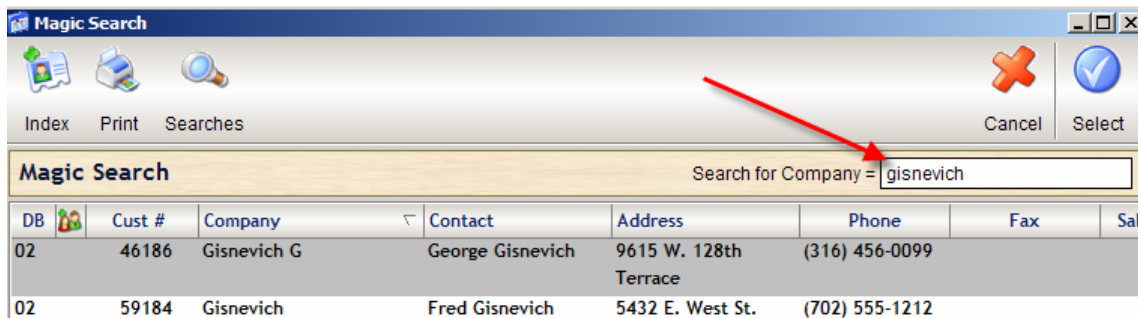
Searching and Finding Customers

Procedure N01; January 2008

www.customerfrontline.com

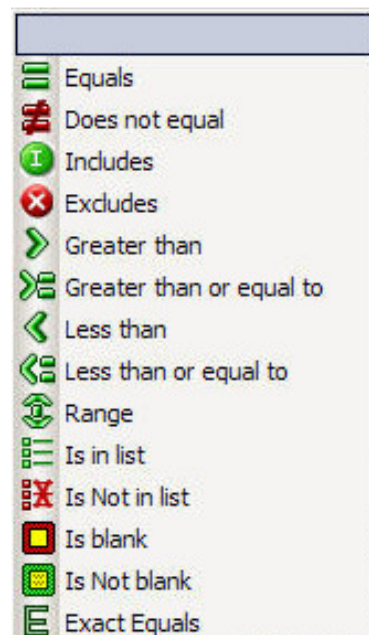
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This Customer Frontline™ (CFL) procedure will help you navigate the database of customer records in a variety of ways. There are two categories of customer searches. One is a locator where a single customer record is located and displayed. The locator can be used on any field that has the spyglass icon located in the right hand corner. For example, clicking the spyglass in the L.Name field activates the search screen with the cursor in place for you to type in the last name of the customer you want to find:



Type in the name of the customer, then double click on the name in the display field, or highlight the desired name and click the "Select" button in the upper right corner of the search screen. This locator is very useful when you are not exactly sure of how a name is spelled...the locator will display and array of names as soon as the first three letters are entered in the name field. Then the list can be scrolled to locate and highlight the right customer.

The second type of customer search procedures is called a "Screen Search". This tool enables you to select one or more fields, by attribute that will qualify a certain category of customers for you to contact. See the menu of field attributes available for you to use. These attributes tell Customer Frontline how to treat the contents of the selected field when it searches across all of the customers in your database.



Screen search example: Salesperson XADS wants to locate all Grand Piano shoppers who belong to him, rated as level 3 and 4 prospects, that started to shop for a piano since 09/01/07. By clicking “Screen Search” in the left tool bar the screen below is displayed. All fields are open for you to specify the attribute qualifications of any variety of fields. The search below fulfills previously specified qualifications.

The search is launched when the “Start” button, located in the upper right corner of the screen, is clicked. The number of qualified customers is displayed. These customer records can be navigated with the right-left arrows in the tool bar or on your computer keyboard. Records can be updated, FTI notes entered, etc. while in a screen search. The search is ended by clicking the “Exit Search” button.

Questions & Comments

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