

AgVantage Customer Relationship Manager (CRM)

FEATURES & BENEFITS

- Web based for use on any device
- Customer retrieval from Customer Master File
- Contact file with all customer contacts and preferred method of communication
- Assign to products, customer, and user according to your needs
- Attach any file to the call record
- Quick and easy access to see customer purchase history
- Date of last sale of product
- Sales Totals



CRM Leads View

Search Date Filter Refresh + New Lead Select View Leads

Customer	Customer Name	Lead Info	Creation Date	Last Update	Action
200110	AHLERS AMANDA	SHE NEEDS A FEED REP ASAP	11/04/2015 14:36:17	11/04/2015 14:37:12	Action
1600	UNDERWOOD FRANK	TEST NEW USER THEN DELETE	10/09/2015 13:26:11	10/09/2015 13:29:18	Action
1600	UNDERWOOD FRANK	TESTING EDIT LEAD EMAIL	10/09/2015 12:32:26	10/09/2015 12:33:45	Action
1600	UNDERWOOD FRANK	NEW LEAD FROM CUST PROFILE	10/08/2015 15:34:58	10/08/2015 15:37:40	Action
1600	UNDERWOOD FRANK	NEW LEAD FROM LEADS VIEW - EDIT	10/08/2015 15:25:17	10/08/2015 15:29:41	Action
736189	PRATT JAMIE	NEW LEAD FOR JAMIE	10/08/2015 14:20:21	10/08/2015 14:21:31	Action
34567	LONG HARRY	TESTING NEW LEAD RELEASE	10/08/2015 14:17:41	10/08/2015 14:17:41	Action
736179	SNOW JON	TESTING NAME	10/08/2015 14:16:51	10/08/2015 14:16:51	Action
736179	SNOW JON	TEST	10/08/2015 14:04:31	10/08/2015 14:04:31	Action
736179	SNOW JON	TEST	10/08/2015 13:56:43	10/08/2015 13:56:43	Action
736179	SNOW JON	TESTING	10/08/2015 13:56:11	10/08/2015 13:56:11	Action

Leads View

Views Setup

Customer Profile

+ New Communication + New Lead Refresh Data

Customer Info Alternate Contacts Aging

BAXTER VERNON E
Address: 2195 STATE ROAD, WYKOFF, MN 55235
support@agvantage.com, P: 318-555-2312, C: 888-555-1212
Default Salesman: JOSEPH E, COD Code:

Comments Leads Communications

Previous Leads

Lead Info	Creation Date	Last Update	Action
TEST	10/02/2015 10:07:36	10/06/2015 15:52:45	Action
TEST	10/06/2015 15:32:11	10/06/2015 15:32:11	Action
TESTING	10/06/2015 15:35:17	10/06/2015 15:35:17	Action
TEST	10/06/2015 15:36:00	10/06/2015 15:36:00	Action
FUEL TEST	10/06/2015 15:45:17	10/06/2015 15:45:17	Action

Customer Profile

AgVantage
Software®

For pricing information, please contact Michelle Blomberg, michelleb@agvantage.com or 877-282-6353.
AgVantage Software, Inc., 107 Wood Lake Drive, SE, Rochester, MN 55904 www.agvantage.com