

Data Link Solutions, Inc.

Sample Sales Lead Account Profile

User defined territories permit better organization of accounts based on your selling style.

Account type indicates if the account is a renewal or a new (prospect) account. Your renewal accounts can be separated from new accounts if desired.

Your last year sales information can be placed on the account profile. We can show how much they spent with you last year, contact names, classifications, and listing information.

The sales rep field can be used to indicate the sales rep who had the account last year, so returning reps can get their renewal accounts again this year. Or, it can indicate the sales rep the account has been assigned to this year, when utilizing our sales rep assignment feature.

(Heading Code/Listing Source Page/Display Ad Source Page)
Insurance Express is listed under Insurance (094600) with an Anchor Bold Listing Red on source page 102 and a Double Column Red display ad on page 101. This makes it much easier for your sales rep to find the listing and ads in the source book.

These totals show how much your customer spent with you, as well as in the competitive books. All rates can be displayed in either monthly or yearly figures.

(General Accident Insurance)
Trade names appear within parentheses on trade items.

These counts indicate 41 out of 55 businesses purchased advertising under the heading of Insurance and the average amount spent on each ad was \$1,244.00. This valuable sales tool can be used by your sales rep to let advertisers know how much their competitors are spending within the same classification.

This form provides a section for a customer sign-off. Great for bold listings and free listing verification. It also provides a call log section for the sales rep to have one spot to keep track of their calls. If desired, the bottom half of the form can be customized to your specifications.

Based on the classification where the account spent the most dollars, our sales lead system will determine the free classification.

Account Profile

Directory: Your Directory Name Packet #: 2 Acct #: 11
 Issue: 1999 Your Company Name Your Phone Number

Acct Phone: 912/227-2777
 Acct Name: Insurance Express
 Address: 515-B W Jackson St
 Community: Thomasville
 Zip Code: 31792
 Contact: Wayne G Johnson

Acct Type: Renewal Page: 1
 Date: 07/12/99
 Sales Rep: John Baker
 Territory: Local

Source	Heading	Rate	Ads	Listing Information
LYS 98		2,340.00		Insurance Express 515-B W Jackson St Thomasville 31792 227-2777
BSA 98	Insurance (094600/102/101)	6,340.20	ABLR DCR	Insurance Express 515 W Jackson St Thomasville 31792 227-2777
BSA 98	Insurance-Life (096300/106)	591.00	4HS	Insurance Express 515 W Jackson St Thomasville 31792 227-2777
LYS 98		0.00		Roberts & Hammond Insurance Agency 120 E Jackson St Thomasville 31792 226-3071
BSA 98	Insurance-Automobile (094900/106)	298.80	2HS	Roberts & Hammond Insurance Agency 120 E Jackson St Thomasville 31792 226-3071
BSA 98	Insurance-Property & Casualty (096750/107)	227.40	EL	Roberts & Hammond Insurance Agency Property Casualty And Life Main Office 120 E Jackson St Thomasville 31792 226-3071 If No Answer 226-2135 Gateway Office 515 W Jackson St Thomasville 31792 227-2777 If No Answer 226-2135
BSA 98	Insurance (094600/100)	98.40	TN TNSL	Roberts & Hammond Insurance Agency (General Accident Insurance) 120 E Jackson St Thomasville 31792 226-3071
BSA 98	Insurance-Life (096300/106)	0.00	RL	Roberts & Hammond Insurance Agency 120 E Jackson St Thomasville 31792 226-3071
	Yearly Total LY	2,340.00	9,652.20	
End of Account				

Your **FREE** listing will be included under the heading of: Insurance (41/55 \$1,244.00)

Customer Signature: _____ Date: _____ Title: _____
 Printed Name: _____ OEL: _____

Date	Rep	Contact	Comments

All information above is correct. Change: Address Phone Number Heading
 Delete: Out Of Business Other: _____ **Note ALL Changes Above!**

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