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Removing Inactive Customer Accounts

In order to remove inactive customer accounts the CRM/Sales Prospecting module must be licenced.

An Inactive customer is defined as an account that has not traded in the last 48 months.

Step 1 - Create a Market Analysis Code for Inactive Accounts

(System Management, Prospect Data, Market Analysis Codes)

Insert a new code to be used to indicate inactive customers.

🕻 Analysis Code File Maintenance - Amend Mode				
Details				
		1		
Analysis Code:	CUINA			
,				
Description	land the Outline of	-		
Description:	Jinactive Customer			
OK Cancel				

Step 2 – Update the Company Control File

(System Management, Set-Up and Security, Company Control File)

Enter in "Amend" mode in order to store the changes made.

On the "CRM" tab, select "Reporting".

Enter the new analysis code against Inactive.

Note: other codes including those for Improving and Declining Activity also need to be created and entered here.

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G Reporting - Amend				×
<u>M</u>	<u>Ionths</u>	<u>Analysis C</u>	ode	2
New:	6	CUNEW		New Customer
Active:	12	CUACT		Active Customer
Inactive:		CUINA		Inactive Customer
At Risk:	36	CURIS		Customer at Risk
Lapsed:	42	CULAP		Lapsed Customer
Inert:		CUINR		Inert Customer
Improving Activity:		IMAC		Improving Activity
Declining Activity:		DEAC		Declining Activity
Improving Turnover:		IMTO*		Codes W,P,J,O exist for replacing *
Variance%:	0			
Declining Turnover:		DETO*		Codes W,P,J,O exist for replacing *
Variance%:	0			
OK Cancel				

Step 3 - Run the Opportunity Report

(CRM/Sales Prospecting, CRM Opportunity/Penetration)

Select a Report Type of "**Opportunity**" from the Options tab.

Make sure that "Update Activity Analysis Codes?" is set to 'Yes'.

G CRM Customer Analysis Report Print					
Options Opportunity Penetration Prospe	ects Activity Market Lost Print				
Department:					
Dopartition					
Salos or Margin:					
Sales of Margin.					
la alcula Darfis Orders					
Include Pretix Codes:					
Exclude Prefix Codes:					
	×				
Update Activity Analysis Codes?:	Yes 💌				
Update Turnover Analysis Codes?:	No 🚽 No of Months: 12				
OK Cancel Save Reset Default					

Note: this report can take some time to run as 4 years of data are checked.

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When the report is printed the section for Inactive accounts will give an indication of which accounts have been updated with the Inactive market analysis code. These should be checked before continuing.

Step 4 - Create a Mailshot Extract

(CRM Sales Prospecting, CRM Extract / Print Mailshot)

A mailshot extract needs to be produced covering only those customers with the Inactive market analysis code set.

Select an Extract Type of "Customers/Prospects".

Use the "Insert" option to create a new extract.

In the "Customer Parameters" section select only the Inactive market analysis code in the "Include Analysis Code" section.

G Customer Parameters		×
SELECTIONS	FROM	то
Customer Accounts:	ALL	
Customer Name:	ALL	
Representative:	ALL	
Area:	ALL	
Mail Sort Code:	ALL	
Outlet Type:	ALL	
Include Post Codes:	ALL	
Include Analysis Code:	CUINA	AND
Exclude Analysis Code:	NONE	
Contact Name Type:	· · · · ·	
Customer/Prospects:	BOTH	
OK Cancel Default		

Defaults can be selected for all other options.

From the "Options" menu, select "Extract Customers".

The extracted list may be seen from the "Inc/Exc Customers" option.

G Custome	er Insert Mod	e				
Extract (Code:	INACT				7 Customers
Details:		inactive a	ccounts			7 Included
					Create	ed By:
					On:	14/10/2009
					At:	15:24
		,				
Address	10 Th	e Crescent		 Postcode	BH24 5LH	_
	Farnb	orough		Phone No.		
	Hants	3		Mail Sort		
				Sales Rep	GO	
Cust		Short Name	Full Name			
1006		SMITHRJ	RJSMITH		Yes	
1207		SMITHPETE	Pete Smith		Yes	
1226		PALMER	Palmer Ltd		Yes	
8001		HIGHLAND	Highland Finance		Yes	
8003		AYLES	Aylesbury District Council		Yes	
9000		SMITHNELSO	Smith Nelson & Co.		Yes	
9001		MIDLAND	Midland Shires Farmers		Yes	
		I				
				0		
OK	Exc Al	I Inc All Ex	clude Include <u>Exc Cus</u>	nc Cus		

It is recommended that this list be double-checked against the Opportunity Report before proceeding.

Step 5 – Convert all Customers Listed to Prospects

(System Management, Prospecting, Mass prospect Modifications)

Convert all customers produced by the mailshot to prospect accounts.

Enter the Extract Code produced in step 4.

Change the "Action Type" to "Change Customer to Prospect".

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G Prospect Mass Deletion/Upd	ate p. 25/1 POOLE			
Select the extract code as	s the basis for this selection. This	s is done using		
Extract / Print Mailshot in (prospecting. Then choose the ac	tion required.		
· .				
Extract Code:	INACT			7 Customers
				7 Included
Details:	inactive accounts		Created	By :
			On :	14/10/2009
			At :	15:24
Action Type :	Change Customer to Prosp	ect 🗾		
		<u></u>		
PROCESSING DETAILS				
I racking records removed	•	Analysis records removed/upda	ted:	
Prospect Tracking recs rer	noved:	Prospect Master records remov	ed:	
Customers changed to Pro	ospects:	Custs NOT changed to Prospec	ts:	

Ensure that the count matches the expected number.

Step 6 – Delete the Prospect Accounts

(System Management, Prospecting, Mass prospect Modifications)

If required these prospect accounts can now be deleted to remove them completely.

Enter the extract code then select "Delete Prospects Totally".

G Prospect Mass Deletion/Up	date		X		
Select the extract code as the basis for this selection. This is done using					
Extract / Print Mailshot in	prospecting. Then choos	the action required.			
Extract Code:	INACT		7 Customers		
			7 Included		
Details:	inactive accounts	Created By	1		
		On :	14/10/2009		
		At :	15:29		
Action Type :	Delete Prospects T	tally			
		Record Counts Displayed Below - Do You Want To Continue?			
	Γ	Yes No			
PROCESSING DETAILS	∋÷				
Tracking records removed	d: r	Analysis records removed/updated: 14			
Prospect Tracking recs re	emoved: 7	Prospect Master records removed: 7			
Customers changed to P	rospects:	Custs NOT changed to Prospects:			
OK Cancel					

Again, be sure to check the expected numbers before proceeding.