

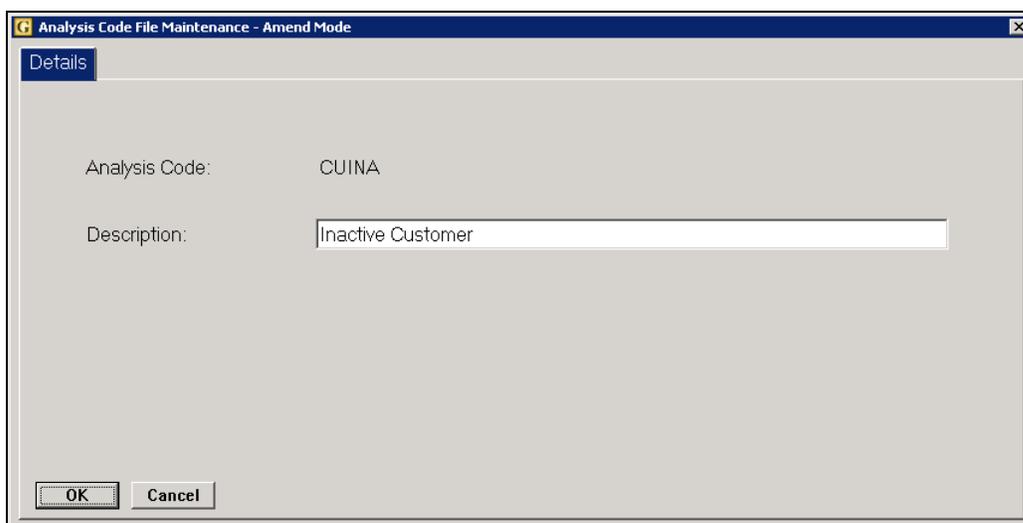
Removing Inactive Customer Accounts

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.



The screenshot shows a software dialog box titled "Analysis Code File Maintenance - Amend Mode". It has a "Details" tab selected. The "Analysis Code" field contains the text "CUINA". The "Description" field contains the text "Inactive Customer". At the bottom of the dialog, there are two buttons: "OK" and "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.

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’.

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

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.

The screenshot shows a dialog box titled "Customer Parameters" with a "G" icon in the top left and a close button in the top right. The dialog is divided into two main sections: "SELECTIONS" on the left and "FROM" and "TO" columns on the right. The "SELECTIONS" section includes fields for Customer Accounts, Customer Name, Representative, Area, Mail Sort Code, and Outlet Type, all set to "ALL". Below these are fields for Include Post Codes (set to "ALL"), Include Analysis Code (set to "CUINA"), Exclude Analysis Code (set to "NONE"), Contact Name Type (set to "..."), and Customer/Prospects (set to "BOTH"). The "FROM" and "TO" columns have empty text boxes. At the bottom are "OK", "Cancel", and "Default" buttons. An arrow points from the text above to the "Include Analysis Code" field.

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.

Customer Insert Mode

Extract Code: **INACT** 7 Customers
 Details: inactive accounts 7 Included
 Created By:
 On: **14/10/2009**
 At: **15:24**

Address: 10 The Crescent
 Farnborough
 Hants

Postcode: BH24 5LH
 Phone No.:
 Mail Sort:
 Sales Rep: GO

Cust	InvNo	Short Name	Full Name	Include
1006		SMITHRJ	R J SMITH	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

OK Exc All Inc All Exclude Include Exc Cus Inc Cus

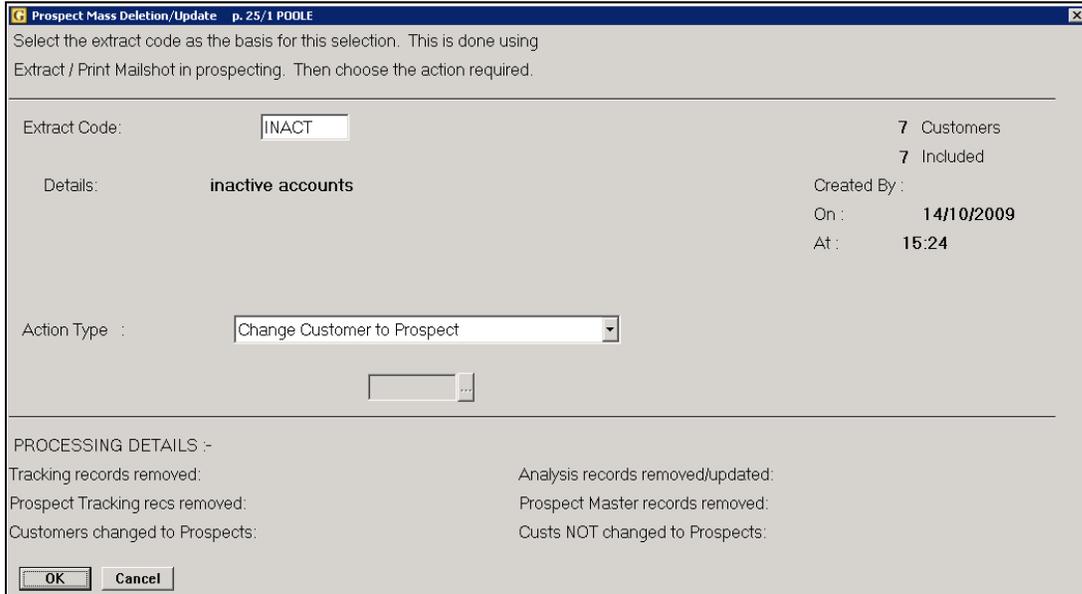
It is recommended that this list be double-checked against the Opportunity Report before proceeding.

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”.



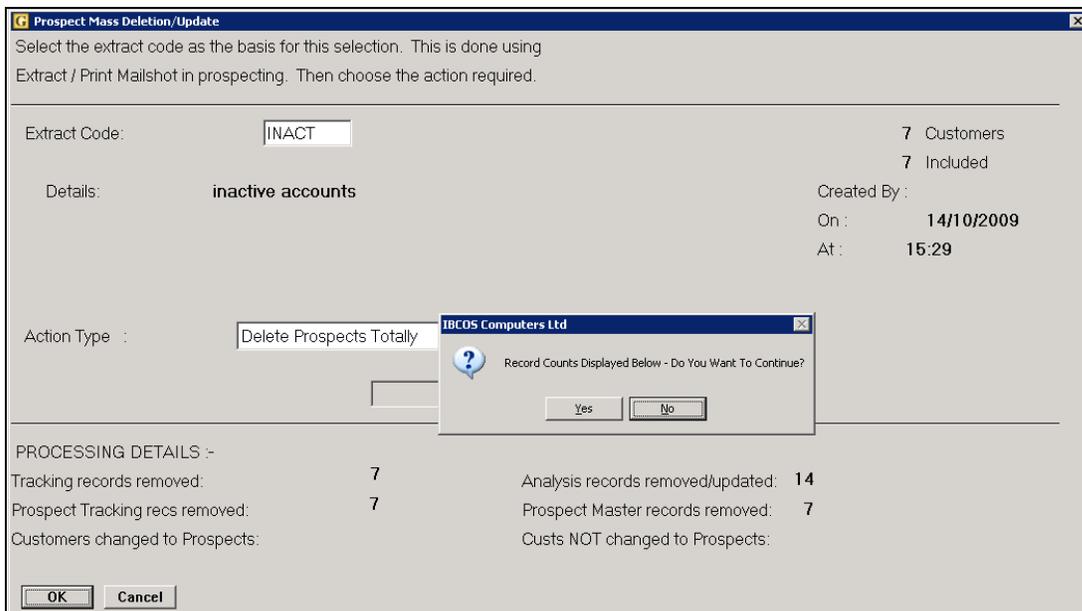
Ensure that the count matches the expected number.

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”.



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