

# Tracking Competitive Equipment Records

Turning competitive data into sales opportunities

Understanding your competitors' market share is important, and Gold includes a tool for tracking competitor-owned machinery. The Competitive tab is an essential tool for tracking competitor-owned machinery. It is used to record and manage details of machinery that a customer owns, which has been purchased from a competitor. This functionality allows you to track the machinery's make, model, warranty end date and potential replacement date. The information gathered here can be valuable in identifying future sales opportunities, especially when an older piece of machinery may be nearing the end of its life. Follow the steps to easily manage machinery records.

## 1. ACCESSING THE COMPETITIVE TAB

In Gold, navigate to  
**Sales Ledger > Customer Enquiry > Comp'tive tab**

The Competitive tab will display a list of existing machinery records. You can:



**Insert**

Add new records.



**Amend**

Update details of an existing machinery record.



**Delete**

Remove a machinery record if it is no longer needed.



**Print**

Generate a printed copy of the details for any machinery record.

## 2. ADDING A NEW RECORD

1. To add a new machinery record, with the Comp'tive tab open, select **Insert**.

2. This will prompt a series of input fields. Use the table below to complete them.

| Field             | Entry   |
|-------------------|---|
| Wholegood No.     | The default is the next automatic wholegood history stock number with a Z in front instead of a depot code. |
| Make              | A two-character (alphanumeric) code, which indicates the manufacturer, lookup available.                    |
| Model Code        | The manufacturer's model number for the machine, lookup available.  |
| Model Desc        | Description for the model.  |
| Group             | Enter a valid wholegood group code or select from the lookup list.  |
| Engine Hp         | Enter the engine size.  |
| New/Used          | Specifies whether the Wholegood is New or Old.  |
| Year Manufactured | Enter the year of manufacture.  |
| Warranty End Date | Enter the warranty end date.  |
| Replacement Date  | Enter the date on which the wholegood is anticipated to be replaced.  |
| Finance End Date  | Enter a finance end date, if appropriate.   |

Optional:

- **Ser Amd** (Serial Number Amendment) - Allows the whole range of serial number details to be amended. These include Engine Number, Chassis Number and Axle Number as well as the Additional Details such as Colour, Trim and Radio Code.
- **Wgd Spc** (Wholegood Specification) - View or amend the wholegood general or private specifications.
- **ScrPad** (Scratch Pad) - Add any internal notes.

4. Select **OK** to save. The wholegood has now been recorded in the database and against the customer.



#### Did you know?

You can use the entries on the Competitive tab when generating mailshots or extract lists in the CRM module (if licenced). These options can be found on the CRM Extract / Print Mailshot program.

### 3. USEFUL INFORMATION



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