



Tracker is a CRM add-in for Microsoft Outlook. Microsoft Outlook is one of the most popular e-mail and contact management program in a business environment. However, it lacks the ability to smoothly integrate contacts with tasks and calendar items. In addition, it cannot handle necessary sales and marketing tools such as marketing projects, call reports etc.

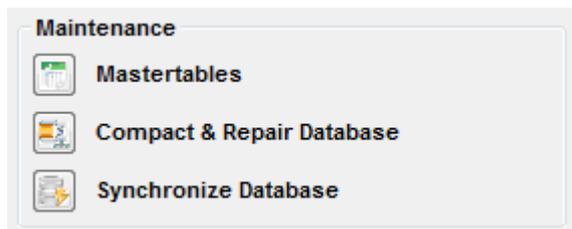
That is where Tracker enhances the features of Outlook, allowing it to be a fully functional customer relationship management program.

This manual illustrates the features of Tracker. Help can be accessed at any time by pressing F1.

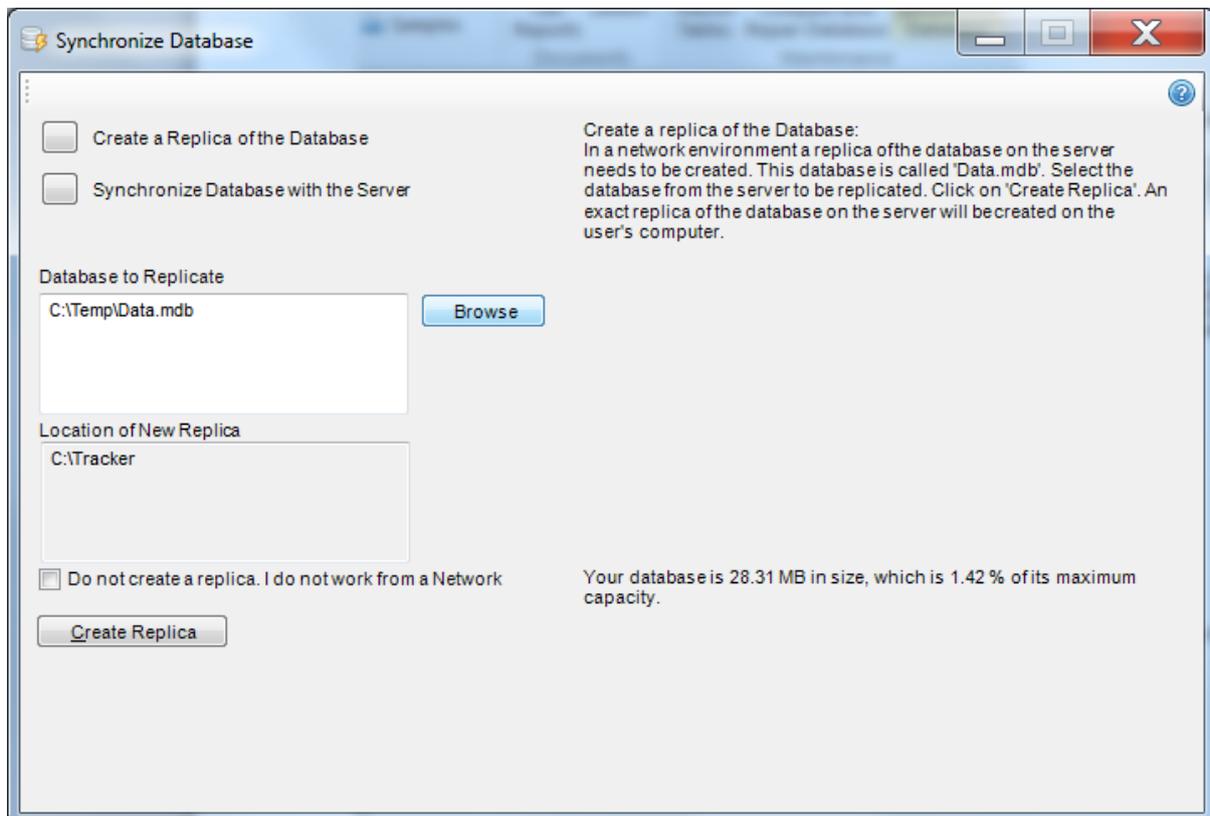
## Network Installation

If you are working in an environment where more than one sales person is using Tracker, you would want them all to synchronize the changes made by each individual over a network. Select or create a folder on the network that everybody has access to and copy the file 'Data.mdb' from the user's machine (by default this file would be found under C:\Tracker) to the selected folder on the server.

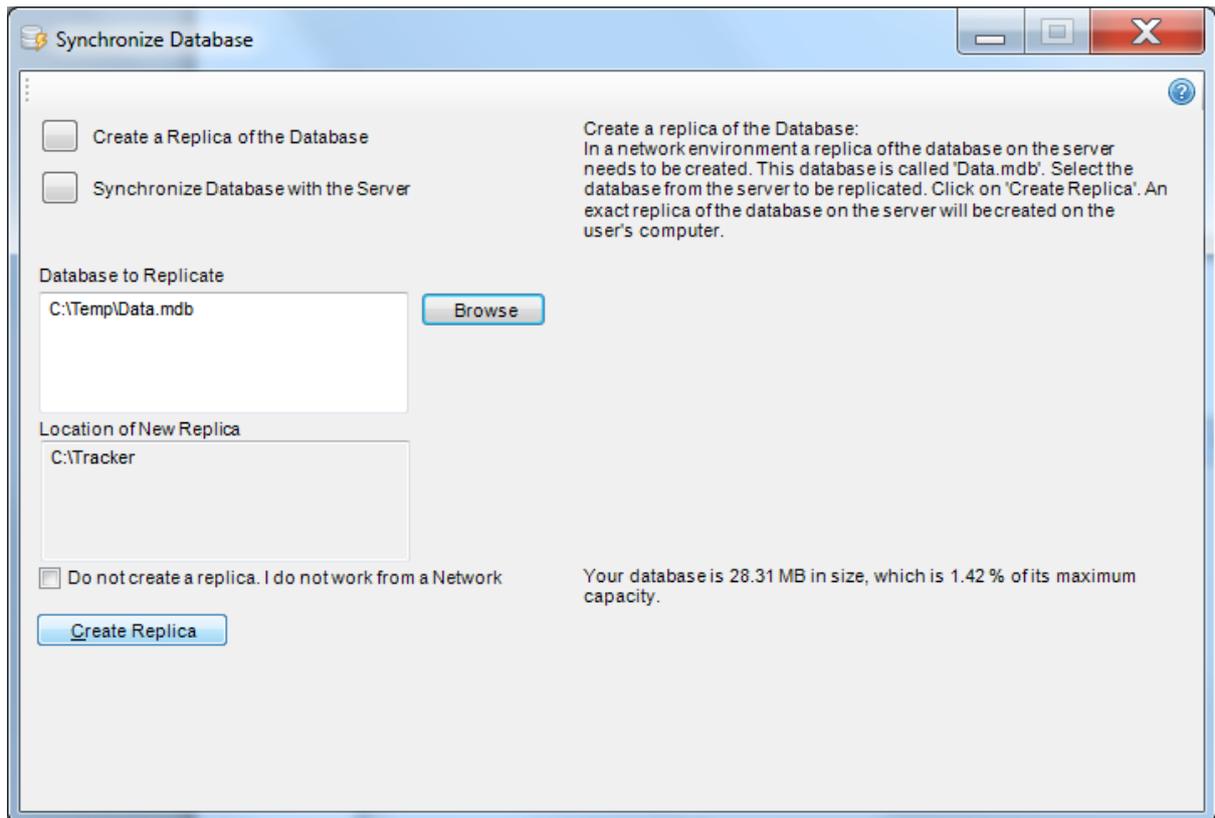
Open Tracker and click on 'Synchronize Database'.



Click on 'Create a Replica of the Database and click on 'Browse' to locate the database on the server.

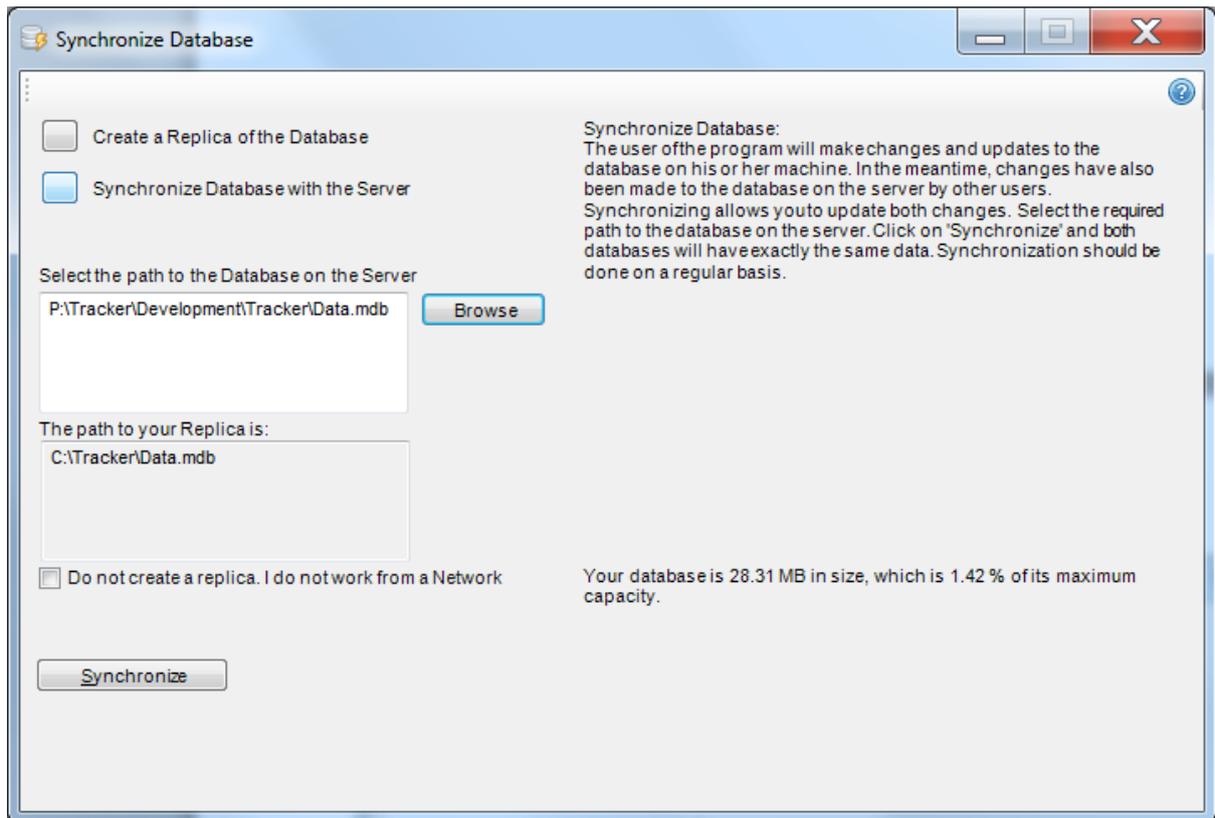


Click on 'Create Replica'.



An exact replica of the database on the server will be created on the client PC.

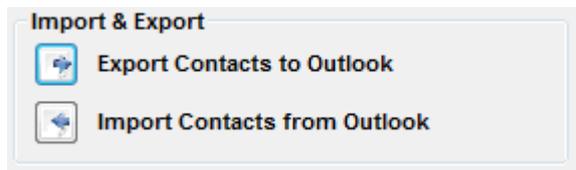
On a regular basis you want to synchronize with the server, ensuring that all changes made by individual workstations are synchronized over the entire network. Open Tracker and click on 'Synchronize Database'. Click on 'Synchronize the Database with the Server'.



Click on 'Synchronize'.

## Importing Contacts from Outlook

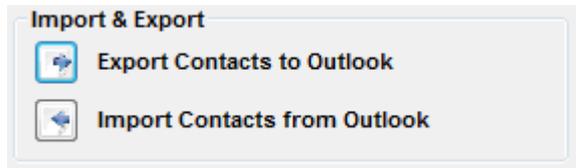
You might want to import contacts from MS-Outlook to the tracker Database.



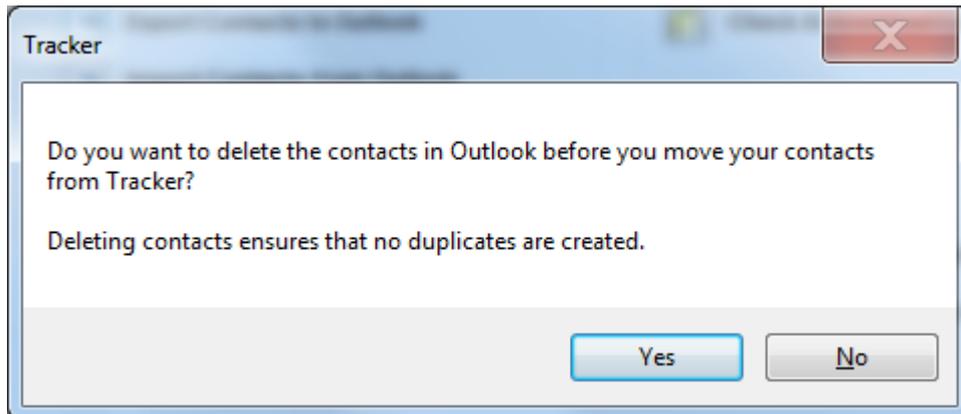
Click on 'Import Contacts from Outlook'. All Outlook contacts will be imported into the Tracker database.

## Exporting Contacts to Outlook

You might want to export your contacts generated in the Tracker database to MS-Outlook Contacts.



Click on 'Export Contacts to Outlook'.



It is advisable to first delete your contacts in Outlook to avoid duplicating contacts.

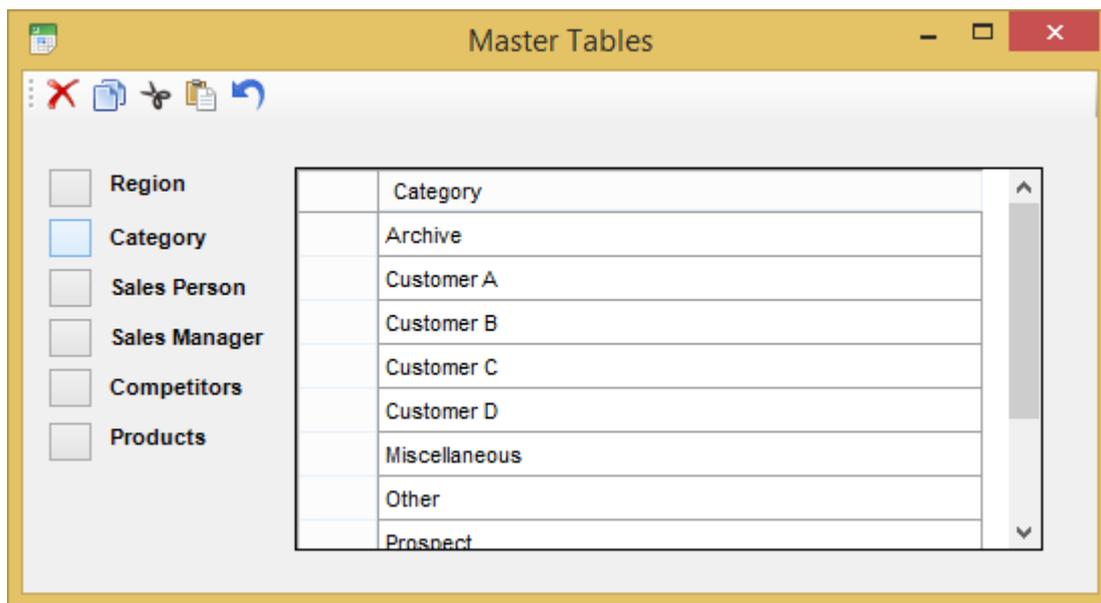
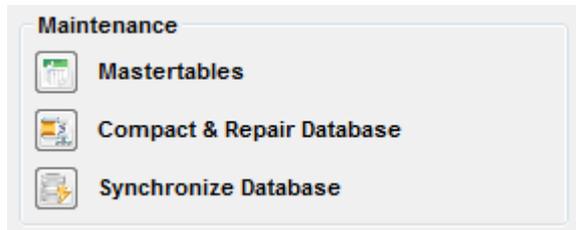
## Help

Anytime you need Help you can select or highlight the item you need help with and press F1 or click on the 'Help' icon.



## Master Tables

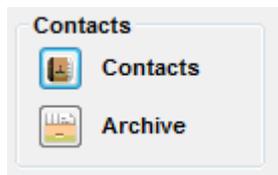
Tracker has a lot of drop-down boxes. These are used to select rather than enter data. This enforces uniformity.



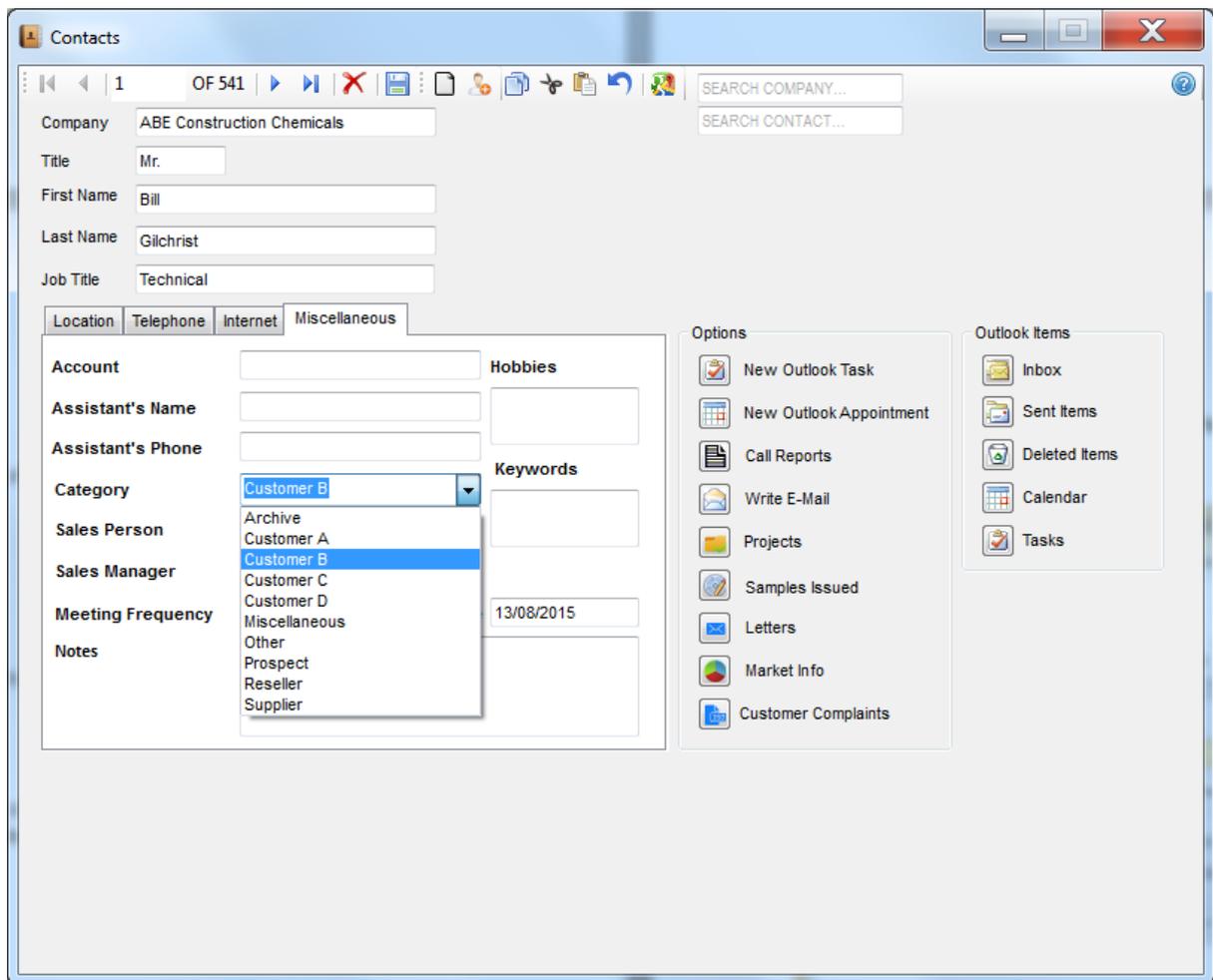
For example you determine which entries can be selected under the drop-down box for 'Category'.

## Contacts

Contacts is what you will be working with most of the time.



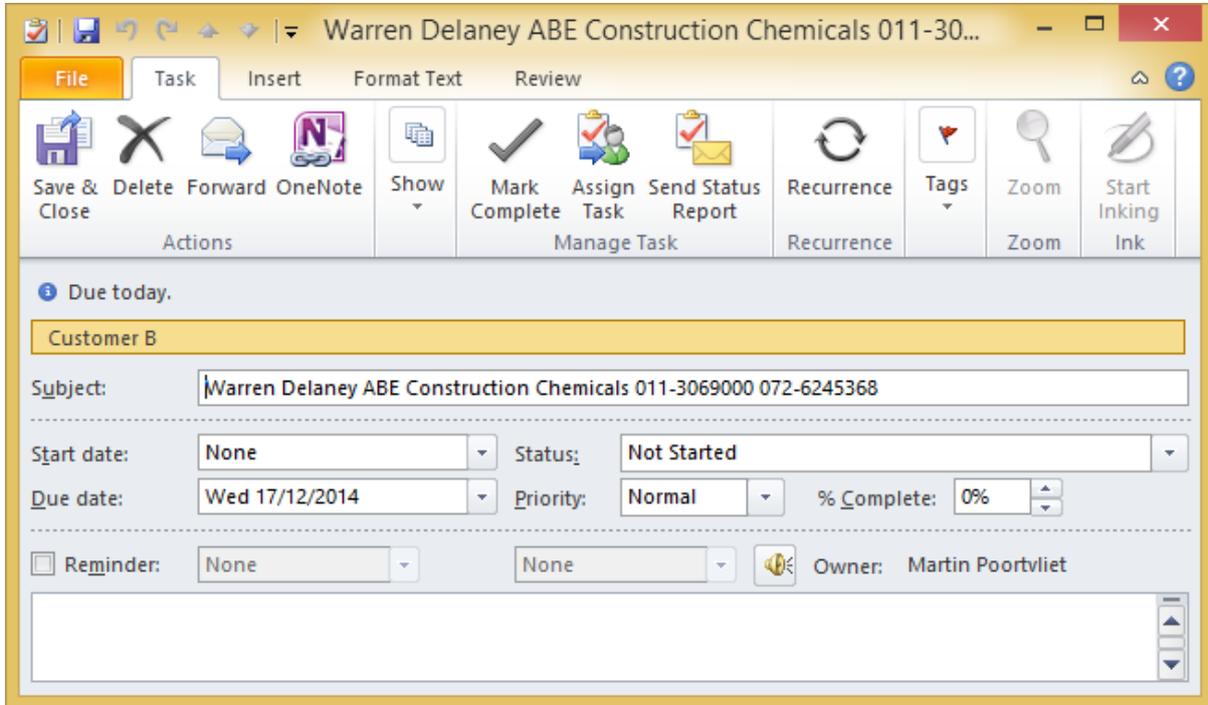
To use the example of Master Tables, a Category is limited in the information entered into Master Tables.



If your business relationship with a contact has come to an end, instead of deleting this contact rather move it to the archive by changing its category to 'Archive'.

## New Outlook Task

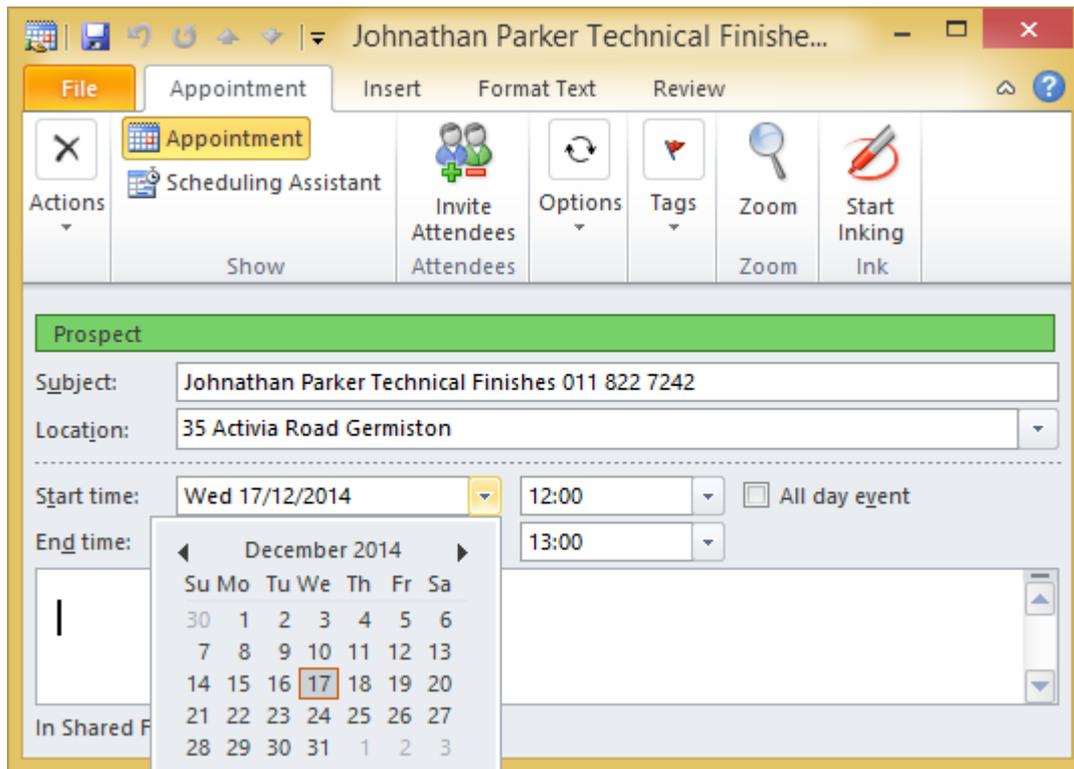
A number of activities can be generated e.g. 'New Outlook Task'.



Task details such as contact details and company are automatically captured. All you have to do is change the due date and save it in Outlook.

## New Outlook Appointment

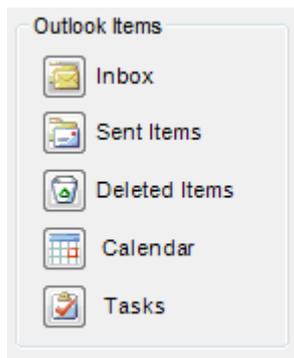




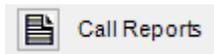
Appointment details such as address and telephone number are automatically captured. All you have to do is change the date and time and save it in Outlook.

## Outlook Items

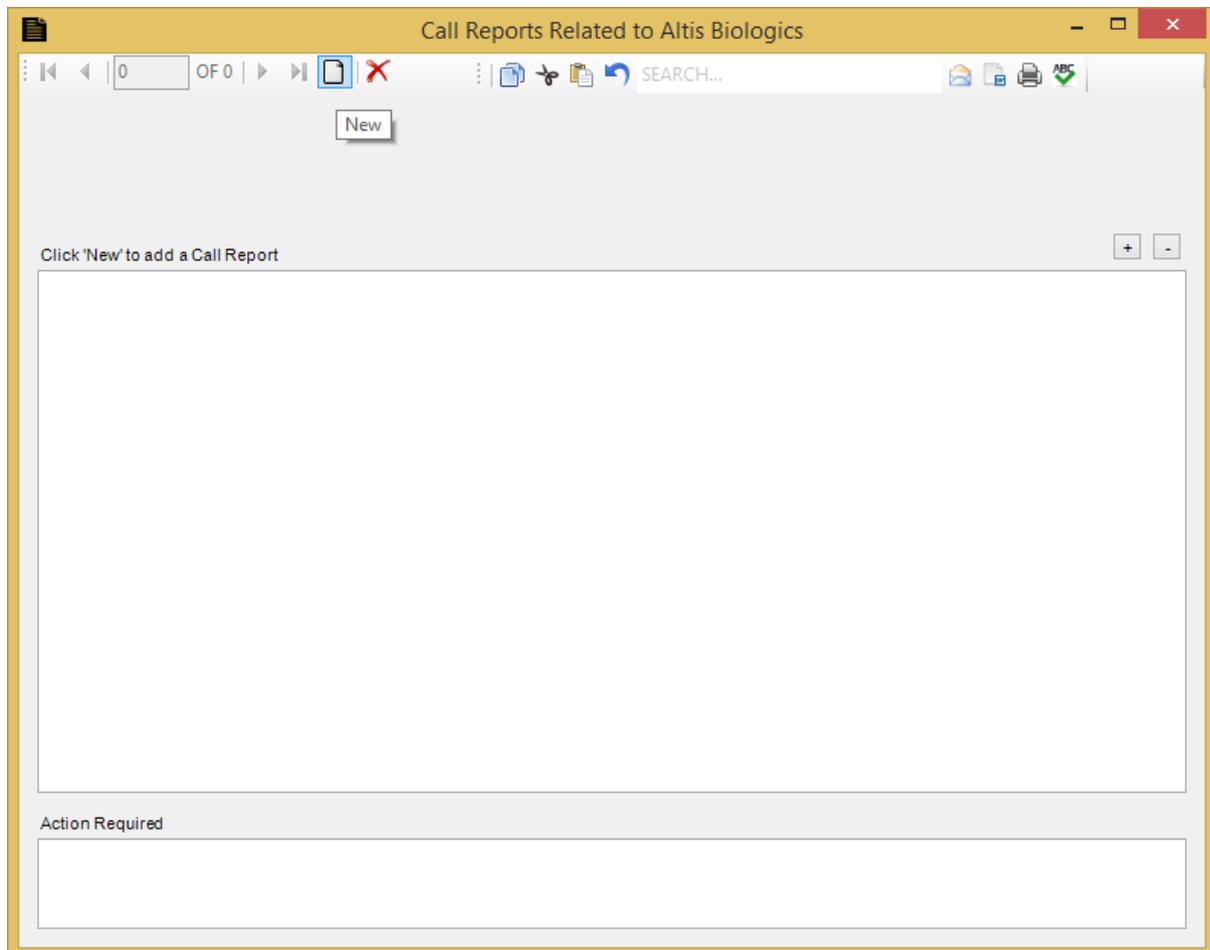
You can easily keep track of e-mails, tasks and appointment items related to a contact in Tracker.



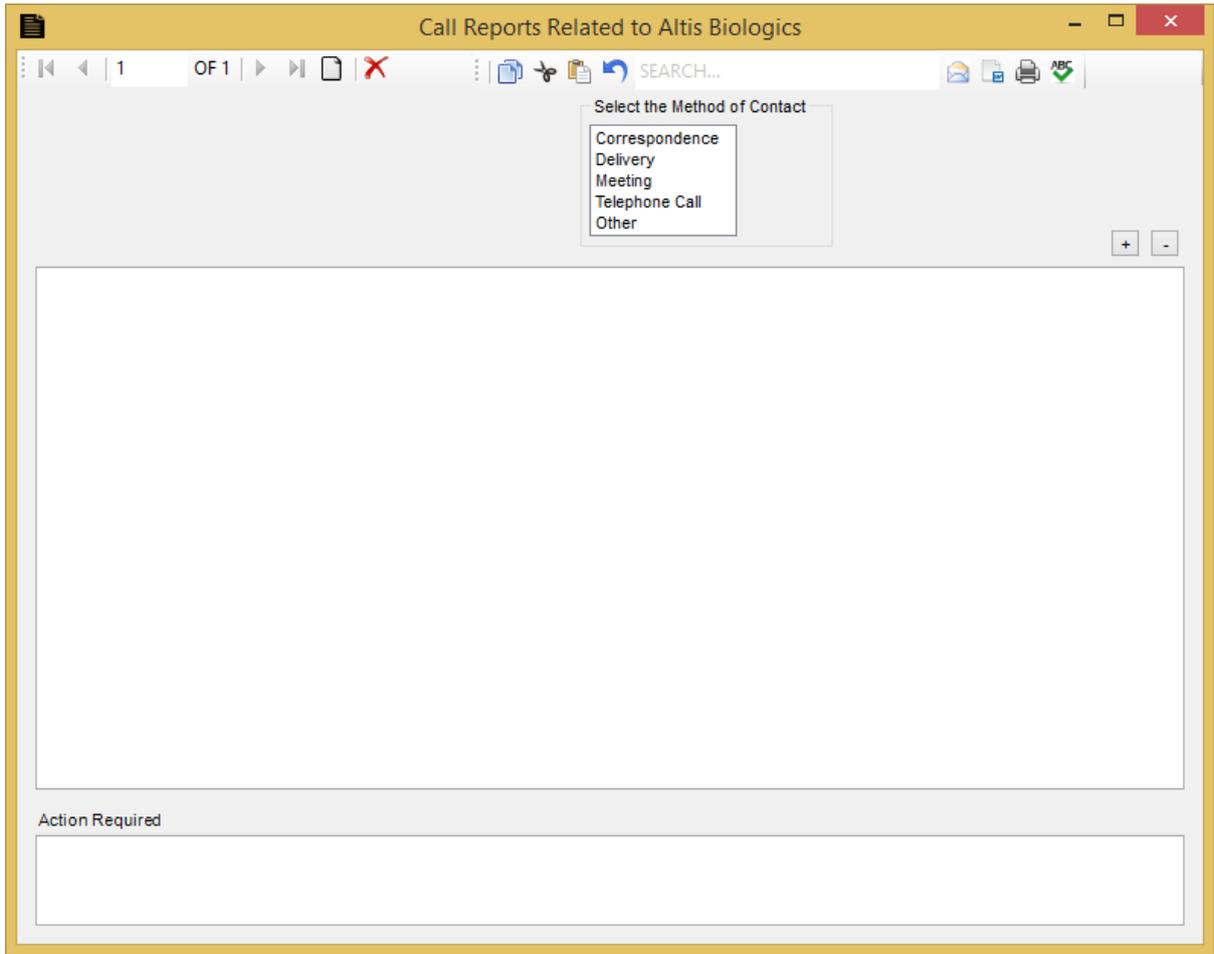
## Call Reports



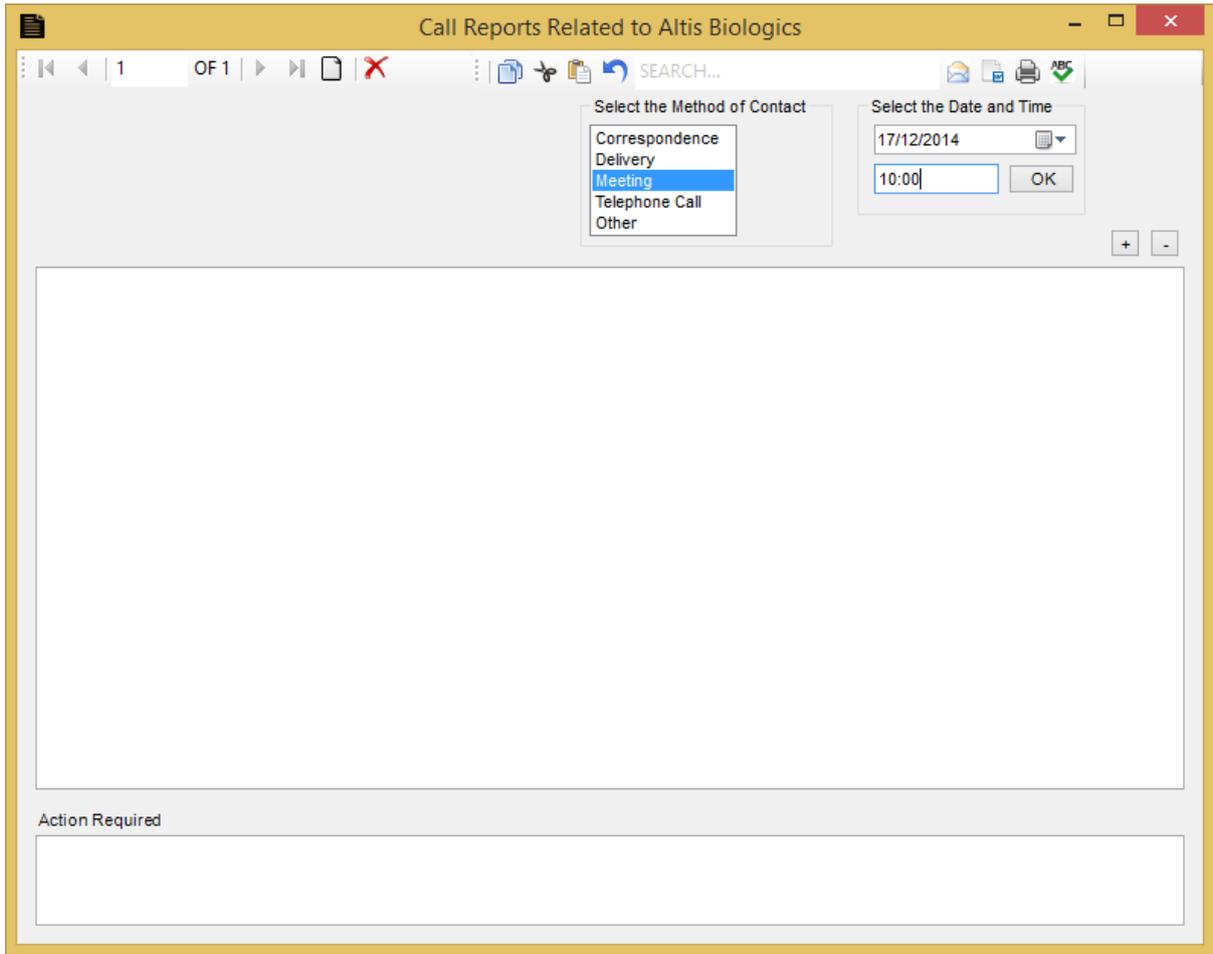
Writing a call report can be done in a few simple steps. Click on 'New'



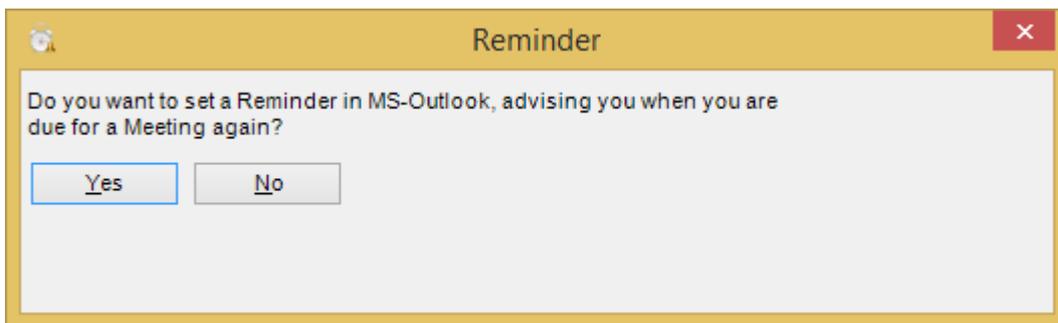
Select the 'Method of Contact'.



Select the Date and Time and click 'OK'.



You can set a reminder in MS-Outlook as to when you need to when a meeting should be scheduled next.

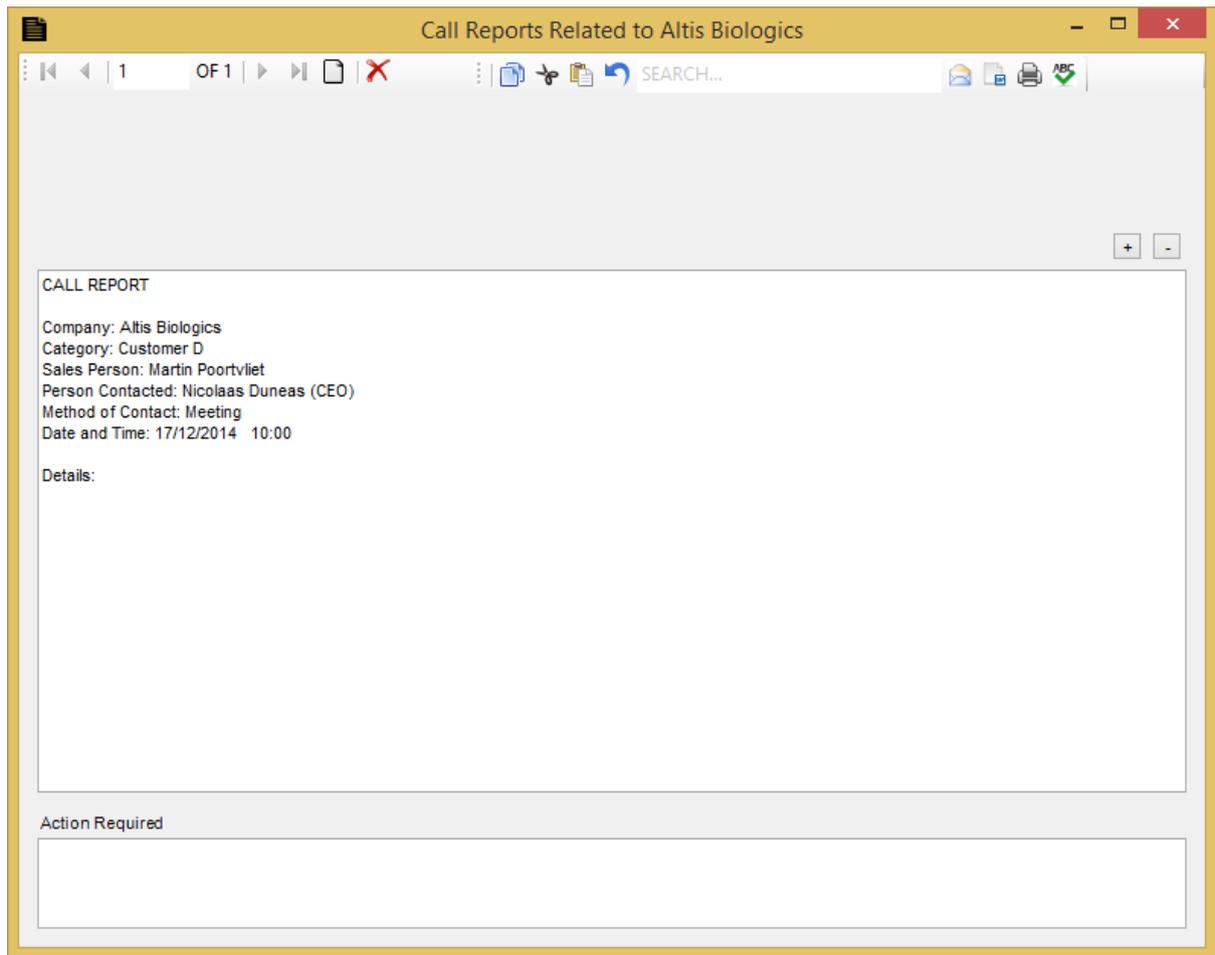


This is based on the 'Meeting Frequency' (in days) you have set in 'Contacts'

<b>Meeting Frequency</b>	<input type="text"/>	<b>Last Meeting Date</b>	<input type="text" value="13/08/2015"/>
<b>Notes</b>	<input type="text"/>		

The reminder will be set 2 days before a meeting is due and will be set for the following Monday if this date falls on a weekend.

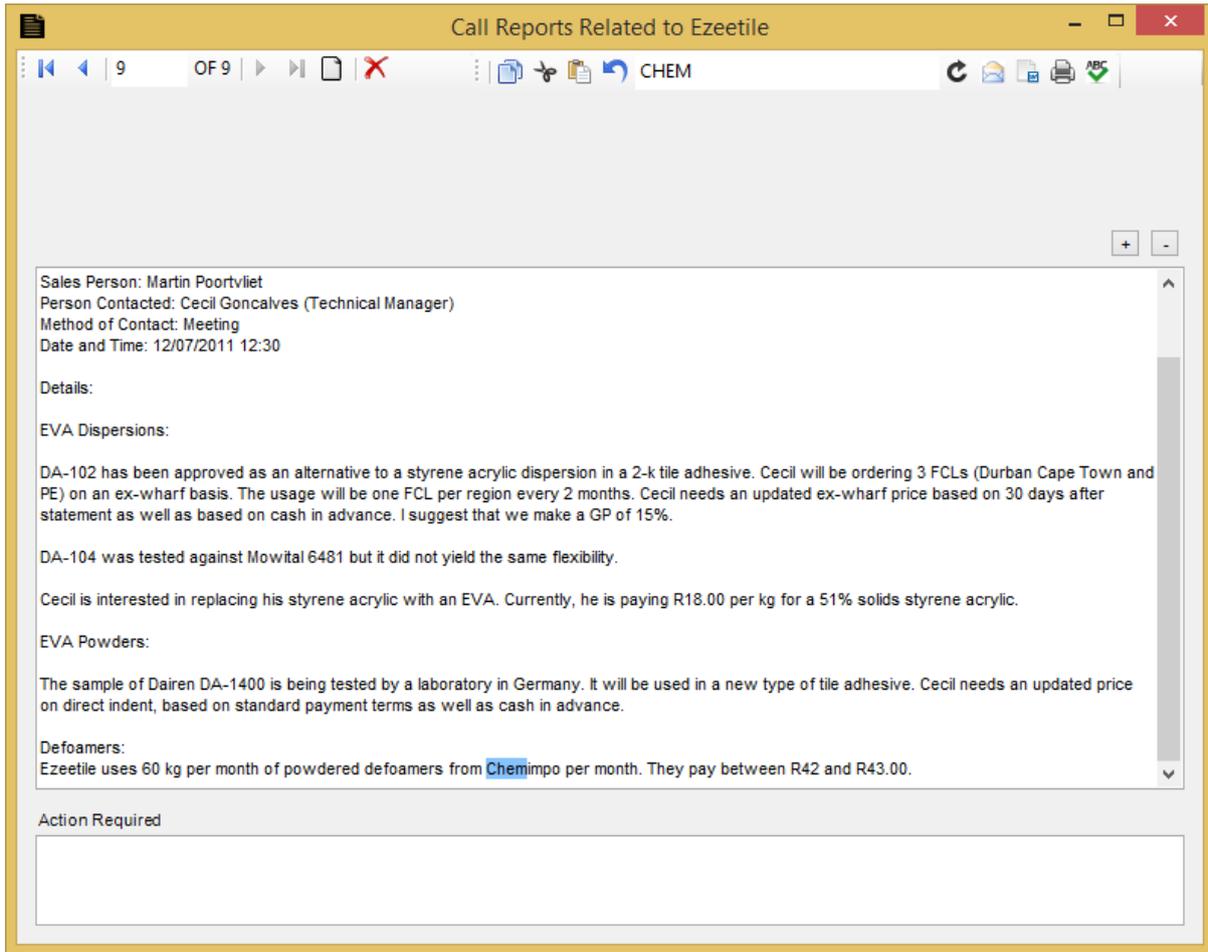
Now all you have to do is fill out the details. Thereafter you can print mail or send the report to MS-Word.



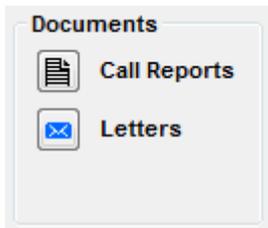
Actions can be assigned to any other members of your organization. This is useful if call reports are mailed to them. A complete list of all call reports with actions can be displayed from the main menu. Here actions can also be deleted once attended to.



You can search for key phrases in call reports. For example search for 'CHEM'. Any call report related to this particular company with the phrase 'CHEM' will be selected with the phrase highlighted.



All call reports from the entire database can be accessed from the main menu.



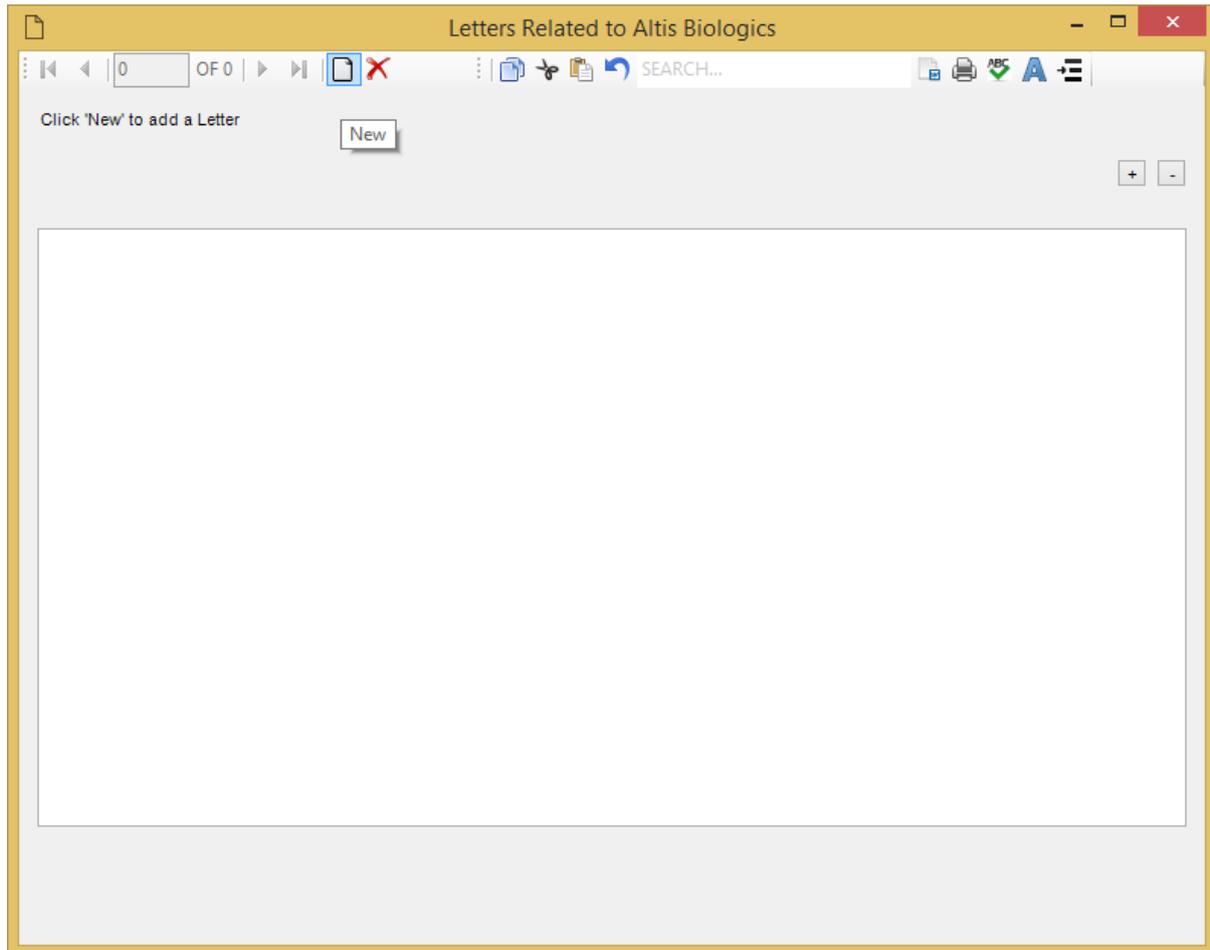
You can then search for key phrases in all call reports. For example search for 'CHEM'. Any call report with the phrase 'CHEM' will be selected with the phrase highlighted.

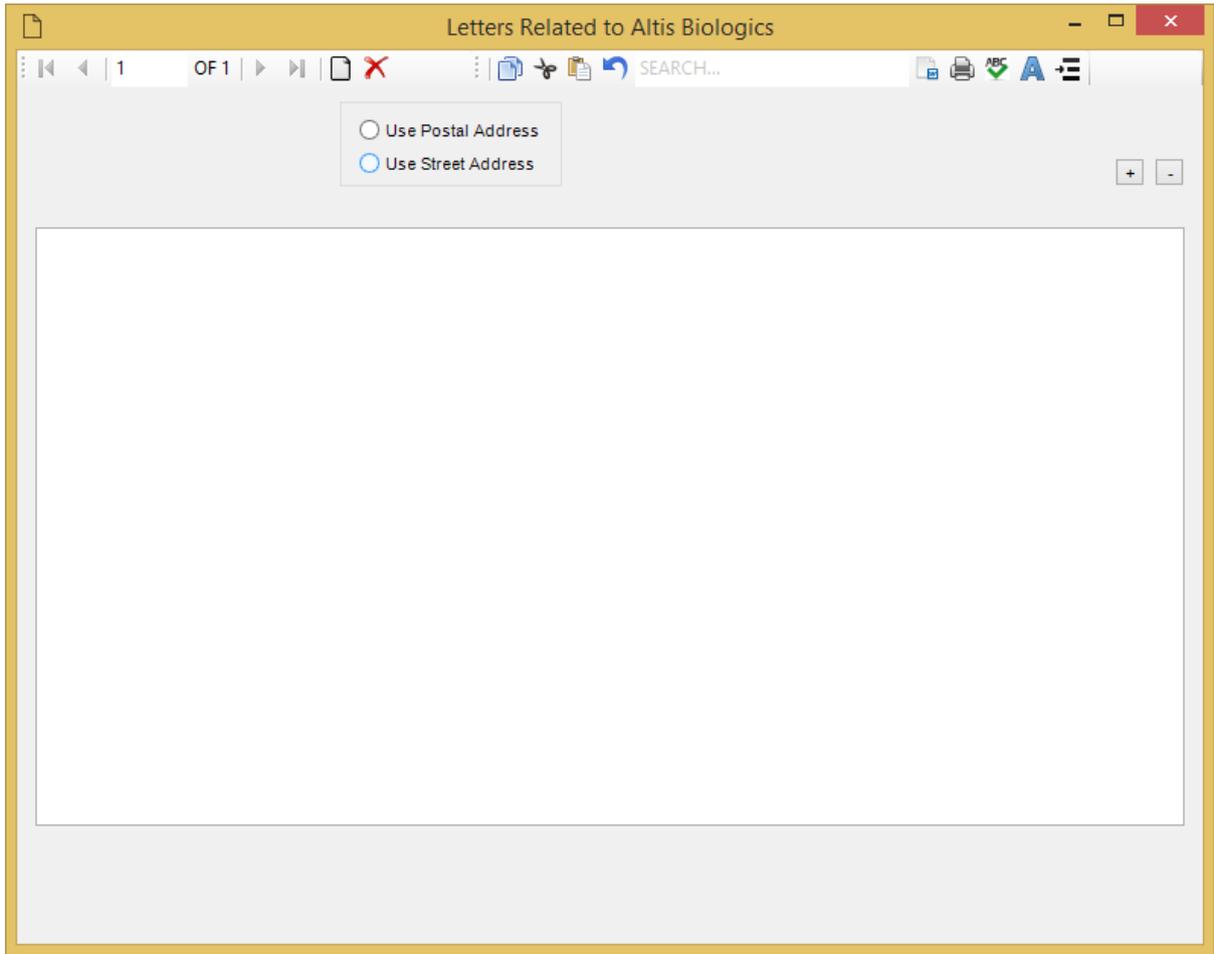
## Letters

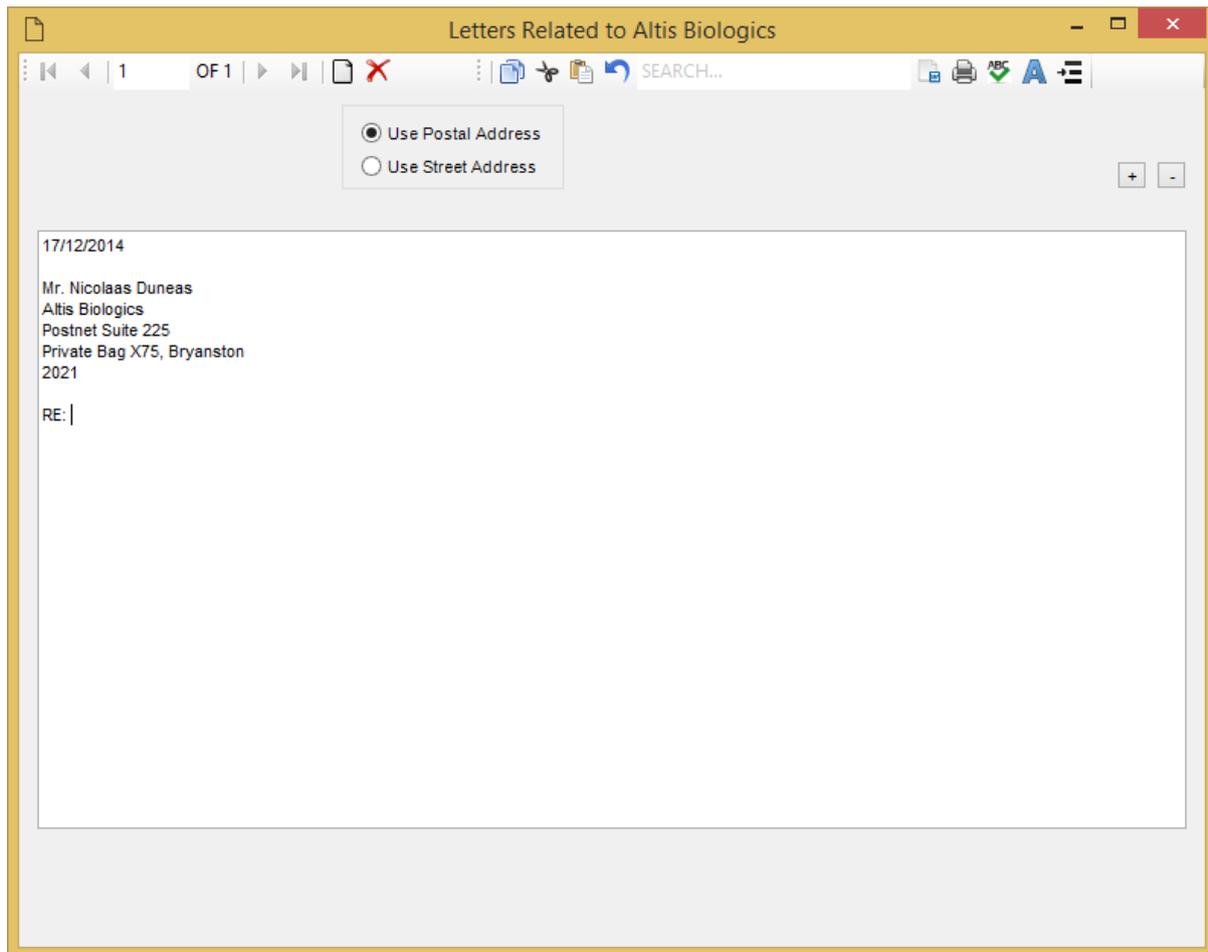


Although not a full word processor, simple letters can be written to contacts in a similar fashion to writing call reports. You need your letterhead added to the file Letterhead.doc, which is located in the folder C:\Tracker.

Click on 'New' and select whether the postal or street address should be used.

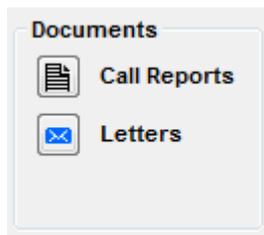






You can search for key phrases in letters. For example search for 'CHEM'. Any letter related to this particular company with the phrase 'CHEM' will be selected with the phrase highlighted.

All letters can be accessed from the main menu.



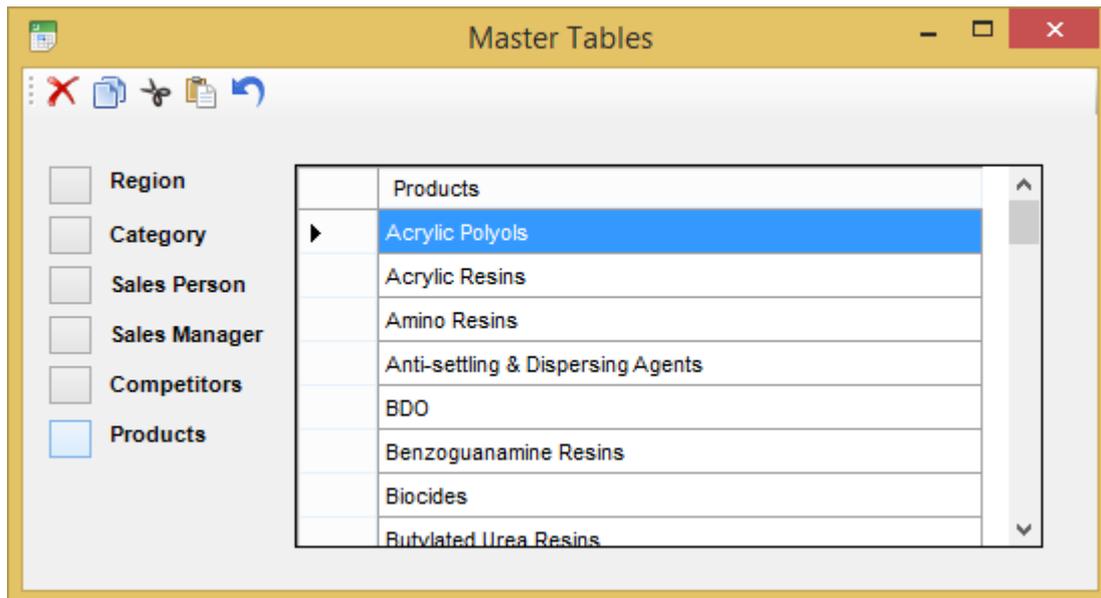
You can then search for key phrases in all letters. For example search for 'CHEM'. Any letter with the phrase 'CHEM' will be selected with the phrase highlighted.

## Projects



Projects can be anything related to a company but are usually a summary of action steps in order to get the business.

You can select an existing name for a project. These names should be set in Master Tables under 'Products'.



Click on 'New'

Projects Related to Altis Biologics

Click 'New' to add a Project

Project Name

Project Status

Project Application

Project Date

Category

Potential Volume  % Probability  Real Value per Annum

Potential Value  % Gross Profit  Real GP per Annum

Select a Project

Go To

- Active Projects
- Cancelled Projects
- Completed Projects

Change Project Status

- Active Project
- Cancelled Project
- Completed Project

Calculate

Action Steps

Click 'New' to add an Action Step

Date

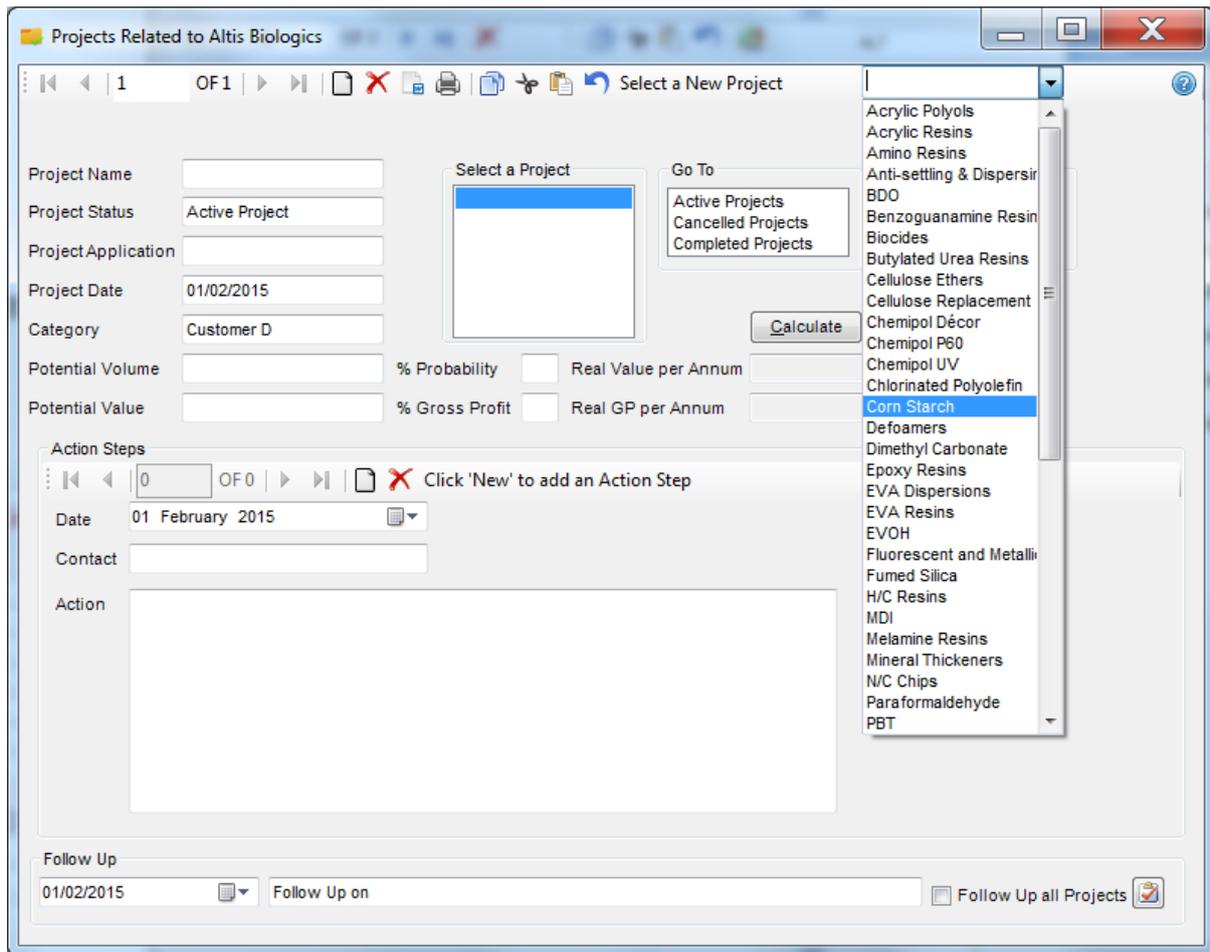
Contact

Action

Follow Up

Follow Up on   Follow Up all Projects

Select a product from the drop-down list.



Click on 'New' under 'Action Steps'

Projects Related to Altis Biologics

1 OF 1 Select a New Project BDO

Project Name: BDO

Project Status: Active Project

Project Application:

Project Date: 01/02/2015

Category: Customer D

Potential Volume: % Probability: Real Value per Annum:

Potential Value: % Gross Profit: Real GP per Annum:

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Calculate

Action Steps

0 OF 0 Click 'New' to add an Action Step

Date: 01 February 2015

Contact: New

Action:

Follow Up

01/02/2015 Follow Up on BDO Follow Up all Projects

Projects Related to Altis Biologics

1 OF 1

Select a New Project BDO

Project Name: BDO

Project Status: Active Project

Project Application:

Project Date: 01/02/2015

Category: Customer D

Potential Volume: % Probability: Real Value per Annum:

Potential Value: % Gross Profit: Real GP per Annum:

Calculate

Select a Project: BDO

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Action Steps

1 OF 1

Date: 01 February 2015

Contact: Nicolaas Duneas

Action:

Follow Up

01/02/2015 Follow Up on BDO Follow Up all Projects

Once a project has been completed, you can assign the project to 'Completed Project'. If the project was cancelled, change it to 'Cancelled Project'.

You can print a summary of all projects with action steps related to a particular company.

Projects Related to Altis Biologics

OF1 | Select a New Project | BDO

Project Name: BDO  
 Project Status: Cancelled Project  
 Project Application:   
 Project Date: 01/02/2015  
 Category: Customer D

Select a Project: BDO

Go To: Active Projects, Cancelled Projects, Completed Projects

Change Project Status: Active Project, Cancelled Project, Completed Project

Calculate

Potential Volume: % Probability  Real Value per Annum:   
 Potential Value: % Gross Profit  Real GP per Annum:

Action Steps

Date: 01 February 2015  
 Contact: Nicolaas Duneas  
 Action:

Follow Up: 01/02/2015 | Follow Up on BDO | Follow Up all Projects

A summary of all projects can be obtained from the main menu and can be analysed in MS-Excel.



Analyze in MS-Excel	Category	Potential	Value	Probability %	GP %	Real Value	Real GP	Project	Project Date	Project Status	Action Date
Altis Biologics	Customer D							BDO	17/12/2014	Active Project	17/12/2014
BASF Elastogran	Prospect	2200000						MDI	25/11/2014	Active Project	12/12/2014
BASF Elastogran	Prospect	66000						Polyether Amine	25/11/2014	Active Project	12/12/2014
BNG Packing & T...	Customer C							Potato Starches	09/03/2012	Active Project	12/12/2014
Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project	12/12/2014
Multi Constructio...	Customer C	6000						EVA Powders	31/03/2011	Cancelled Project	12/12/2014
Royal Adhesives...	Customer B	110	R 4 400.00	100	20	R 4 400.00	R 880.00	Defoamers	13/08/2014	Active Project	12/12/2014
Royal Adhesives...	Customer B							Hardlen CY	21/02/2013	Active Project	12/12/2014
Tyl-Pro Adhesive...	Customer A	11000						Cellulose Replac...	13/01/2014	Active Project	12/12/2014
Ezeetile	Customer A							Anti-settling & Di...	20/08/2014	Active Project	11/12/2014
Ezeetile	Customer A	250000	R 95 000 000.00	50	3	R 47 500 000.00	R 1 425 000.00	Cellulose Ethers	17/07/2014	Active Project	11/12/2014
Ezeetile	Customer A	150000	4200000	50	18	2100000	378000	Cellulose Replac...	03/02/2014	Active Project	11/12/2014
Ezeetile	Customer A	700	R 34 650.00	90	15	R 31 185.00	R 4 677.75	Defoamers	29/05/2014	Active Project	11/12/2014
Ezeetile	Customer A	40000						Potato Starches	05/09/2014	Active Project	11/12/2014
Tyl-Pro Adhesive...	Customer A							Epoxy Resins	09/07/2014	Active Project	11/12/2014
BASF Elastogran	Prospect							Polyurea	25/11/2014	Active Project	10/12/2014
BNG Packing & T...	Customer C							H/C Resins	09/09/2014	Cancelled Project	10/12/2014
BNG Packing & T...	Customer C							N/C Chips	09/09/2014	Active Project	10/12/2014
Multi Constructio...	Customer C	2200	R 83 600.00	10	15	R 8 360.00	R 1 254.00	Epoxy Resins	28/11/2014	Active Project	10/12/2014
Royal Adhesives...	Customer B	22000							12/12/2014	Active Project	10/12/2014
Royal Adhesives...	Customer B	7000						Potato Starches	11/06/2014	Cancelled Project	10/12/2014
Royal Adhesives...	Customer B	11000						PVA	05/07/2012	Active Project	10/12/2014
		22000	704000	20	20	140800	28160	Epoxy Resins	07/07/2014	Active Project	09/12/2014
								H/C Resins	09/12/2014	Active Project	09/12/2014
Dreamhouse Wo...	Prospect	30000						PVA	10/06/2014	Active Project	09/12/2014
Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project	08/12/2014
ABE Constructio...	Customer B							Dimethyl Carbon...	04/12/2014	Cancelled Project	04/12/2014
ABE Constructio...	Customer B	14300	286000	10	20	28600	5720	H/C Resins	16/10/2014	Active Project	04/12/2014
ABE Constructio...	Customer B	1100						Propylene Glycol	04/12/2014	Active Project	04/12/2014
ABE Constructio...	Customer B	30000	R 900 000.00	70	15	R 630 000.00	R 94 500.00	VAE Powders	29/02/2012	Active Project	04/12/2014

Book1 - Projects - [Read Only]

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Clipboard Font Alignment Number Styles Cells Editing

A1	Company	Category	Potential	Value	Probability %	GP %	Real Value	Real GP	Project	Project Date	Project Status
1	Company	Category	Potential	Value	Probability %	GP %	Real Value	Real GP	Project	Project Date	Project Status
2	Altis Biologics	Customer D							BDO	17/12/2014	Active Project
3	BASF Elastogran	Prospect	2200000						MDI	25/11/2014	Active Project
4	BASF Elastogran	Prospect	66000						Polyether Amine	25/11/2014	Active Project
5	BNG Packing & Technology	Customer C							Potato Starches	09/03/2012	Active Project
6	Ezeetile	Customer A	600000	27600000	80	2	R 22 080 000.00	R 441 600.00	VAE Powders	24/10/2014	Active Project
7	Multi Construction Chemicals	Customer C	6000						EVA Powders	31/03/2011	Cancelled Project
8	Royal Adhesives Jhb	Customer B	110	R 4 400.00	100	20	R 4 400.00	R 880.00	Defoamers	13/08/2014	Active Project
9	Royal Adhesives Jhb	Customer B							Hardlen CY	21/02/2013	Active Project
10	Tyl-Pro Adhesives (PTY) Ltd	Customer A	11000						Cellulose Replacement	13/01/2014	Active Project
11	Ezeetile	Customer A							Anti-settling & Dispersing Agents	20/08/2014	Active Project
12	Ezeetile	Customer A	250000	R 95 000 000.00	50	3	R 47 500 000.00	R 1 425 000.00	Cellulose	17/07/2014	Active Project

Ready

## Market Info

'Market Info' allows you to capture details about the activities of your competitors.



The screenshot shows a software window titled "Market Information Related to ABE Construction Chemicals". It features a navigation bar at the top with "1 OF 3" and several icons. On the left, there are input fields for "Company" (ABE Construction Chemicals), "Date" (01/02/2015), "Product" (Cellulose Ethers), "Supplier" (Constructichem), and "Quantity" (11000). On the right, a "Select a Product" dropdown menu is open, showing options: Cellulose Ethers (highlighted), H/C Resins, and Propylene Glycol. Below the dropdown, a text box contains the text "Tylose 900,000 YP2. Tacky cellulose."

It's a good idea to capture details about your sales to the customer as well. This allows you to generate a complete market report on a specific product. Such a market report can be displayed from the main menu.



The screenshot shows a "Market Info" window displaying a table of market data. The table has columns for Date Edited, Product, Supplier, Company, Volume, and Notes. The data is as follows:

Date Edited	Product	Supplier	Company	Volume	Notes
13/07/2012		Constructichem			
09/06/2011			P&F Chemicals		
28/06/2013			Warrior Paints		R28.50
28/06/2012		Nitrocell		50000	R32.00
13/07/2012		Various	Pro-Paint Manufa...	100000	R33.00 per kg
31/05/2013		Undisclosed	Riordan & Co.	7000	R38.00. Ethanol...
22/06/2011		Various	Promac Paints	30000	
12/07/2012		Crest	Madco Paints	22000	R35.00 per kg.
16/07/2014		Servochem	Devcoat	44000	R30.00 per kg TR...
11/04/2013		du Pont	Paintworx Manuf...	50000	Paintworks uses...
06/06/2013		Servochem	Rosko Paints	11000	R16.00
07/03/2012		Rofes	R.A.M Products	38000	R34.00
09/05/2012		Cathay Pigments	Dekade Paints	77000	R33.00 per kg
04/01/2011		Unknown	Medal Paints		
26/06/2013		Chemgrid	MacPherson Paints	22000	R28.00
15/05/2013		Huntsman	Chemical Special...	275000	
19/04/2012		Servochem	Promac Paints	715000	Huntsman TR94 f...
19/09/2013		Cathay Pigments	Olympic Paint Ma...	44000	R30.20
24/07/2013	Acrylic Resins	IMCD	BNG Packing & T...	1900	R51.00
18/01/2011	Anti-Settling & Di...	Unknown	Port Natal Paints		
17/01/2011	Anti-Settling & Di...	Bung Chem	Paintcor	500	
04/01/2011	Anti-Settling & Di...	Unknown	Medal Paints	0	
18/01/2011	Anti-Settling & Di...	Bung Chem	Port Natal Paints	0	Usage: Bentonite...

The report can then be transferred to MS-Excel and analysed according to product.

Book1 - Market Info - [Read Only]

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Clipboard Font Alignment Number

Calibri 11

Wrap Text

General

Normal

Check Cell

	A	B	C	D	E	F	G	H
1	Date Edit	Product	Supplier	Company	Volur	Notes		
2	Sort A to Z		IMCD	BNG Packing &	1900	R 51.00		
3	Sort Z to A		Unknown	Port Natal Paints				
4	Sort by Color		Bung Chem	Paintcor	500			
5			Unknown	Medal Paints	0			
6	Clear Filter From 'Product'		Bung Chem	Port Natal Paints	0	Uses Bentonite as an anti-settling agent.		
7				ABE Construction				
8	Filter by Color		Bung Chem	BASF	0	No product available		
9	Text Filters		Southern Chemicals	Industrial Urethanes	15000			
10				ABE Construction				
11			Southern Chemicals	BASF	70000			
12			Southern Chemicals	Diverse Urethanes	1500			
13			Bung Chem	Kasodur (Cape Town)	14000			
14			Bung Chem	Industrial Urethanes	0	No product available.		
15			Bung Chem	Diverse Urethanes	1500			
16			Actichem	Techem Adhesives	275	Acticide BAC50		
17			Actichem	Kusasa Paints	330	Acticide HF R19.00 per kg.		
18			Actichem	MacPherson Paints	2200	R26.00 per kg		
19			Actichem	Riordan & Co.	2200	Acticide HF. R18.18 per kg.		
20			Actichem	Paintmax	275			
21			Actichem	Olympic Paint	11000			
22			Actichem	Camelot Composites				
23			Actichem	Promac Paints	16000	Rocima 623H		
24			Bung Chem	Rosko Paints	2200	Biopol FI		
25	20/06/2012	Biocides	Actichem	Qualichem	5500	Acticide MV and Acticide HF		

## Customer Complaints

Customer Complaints are applicable if your company has an ISO9000 status.



The screenshot shows a software window titled 'Customer Complaints'. At the top, there is a navigation bar with a back arrow, a page indicator '1 OF 24', and several icons for search, refresh, and print. The main area contains several input fields for complaint details: Date (25/08/2014), Reference (9929321), Company (ABC Paints), Contact (Salvan Govender), Product (GMC8120B), Supplier (ZS Chemicals), Batch (NA), and Sales Person (Martin Poortvliet). To the right of these fields is a 'Change Status' section with two buttons: 'CURRENT' and 'ARCHIVE'. Below the input fields is a 'Details' text area containing the text: 'Sample of KBC8120B was tested. Although initial tests looked good, the product continues to thicken over time.' At the bottom, there is a 'Result' section with two sub-sections: 'Details and Corrective Action' containing a date field (18/12/2014) and a text area with the text 'ABC Paints is now getting HEC from a very cheap source', and 'Preventative Action' containing a text area with the text 'NA'.

Customer Complaints shouldn't be deleted. You can change the status to 'Archive' once the complaint has been dealt with.

You can also toggle between current and archived complaints.

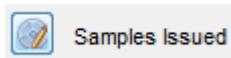


A summary of all complaints can be displayed from the main menu.



## Samples Issued

If your company issues samples you could easily keep track of it.

A screenshot of a software window titled 'Samples issued to ABC Chemicals'. The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with navigation and action icons. The main area contains a form with the following fields:

- Date: 10/10/2013
- Company: ABC Chemicals
- Contact: Sandra Britz
- Product: Contrafoam HKP
- Application: Paint
- Supplier: Afritech
- Potential Volume: 2000
- Result Date: 26/11/2013
- Result: Approved

On the right side of the form, there is a 'Change Status' section with a dropdown menu showing 'CURRENT' and 'ARCHIVE' options, and a separate 'ARCHIVE' button below it.

Samples issued shouldn't be deleted. You can change the status to 'Archive' once the sample has been approved or rejected.

You can also toggle between current and archived samples.

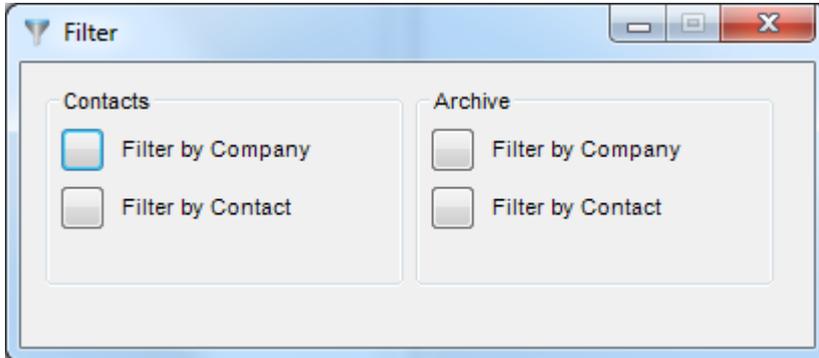


A summary of all samples issued can be displayed from the main menu.



## Filter

You can filter by either company or contact.



Results are displayed in MS-Excel from where a filter can be applied. In this example we filter for all contacts by their hobbies.

In 'Contacts' we also have a field for 'Keywords', which can be used to filter contacts.

Location	Telephone	Internet	Miscellaneous
Account	<input type="text"/>	Hobbies	<input type="text"/>
Assistant's Name	<input type="text"/>		
Assistant's Phone	<input type="text"/>		
Category	Customer B	Keywords	<input type="text"/>
Sales Person	Martin Poortvliet		
Sales Manager			
Meeting Frequency	<input type="text"/>	Last Meeting Date	13/08/2015
Notes	<input type="text"/>		

	A	B	C	D	E	F	
1	Company	First Name	Last Name	Job Title	Hobbies	Keywords	City
29	Africote	Nicky					Bedfor
30	Africote	Robert					Bedfor
31	Africote	Robert					Bedfor
32	Afripack	Brian	Pillay				Durbar
33	Afripack	Brian	Pillay				Durbar
34	Afripack	Jeff	Swanson				Durbar
35	Afripack	Jeff	Swanson				Durbar
36	Afripack	Mervin	Pillay				Durbar
37	Afripack	Mervin	Pillay				Durbar
38	Afripack	Roy	Venkatsa				Durbar
39	Afripack	Roy	Venkatsa				Durbar
40	Afritech (Pty)	Dorian					Somme
41	Afritech (Pty)	Dorian					Somme
42	Afritech (Pty)	LOUISE					Somme
43	Afritech (Pty)	LOUISE					Somme
44	Afritech (Pty)	Steve	Nolte				Macas
45	Afritech (Pty)	Steve	Nolte				Macas
46	Afritech (Pty)	TRUDIE					Somme
47	Afritech (Pty)	TRUDIE					Somme
48	Aidex	Tommy		Owner			Kensin
49	Aidex	Tommy		Owner			Kensin

Sort A to Z  
Sort Z to A  
Sort by Color  
-----  
Clear Filter From "Hobbies"  
Filter by Color  
Text Filters  
Search

- (Select All)
- Cricket
- Cycling Golf
- Fishing
- Golf
- Soccer
- Tennis
- (Blanks)

OK    Cancel

## Price List

A price list is a handy tool to keep track of your prices.



You can search for a specific product and you can also attach specific documents such as product specifications.

A screenshot of a web application window titled "Price List". The window has a light blue header with a gold coin icon and the title. Below the header is a navigation bar with a search bar containing "SEARCH...", a document icon, and a red "X" icon. The main content area contains a form with the following fields: "Product" with the value "ZS1234", "Currency" with the value "R", "Price per Unit" with the value "19.50", "Link" with the value "C:\Users\Martin\Documents\Archive\Attachments\08050508", and "Notes" which is an empty text area. An "Add" button is located to the right of the "Link" field. The window also has standard Windows window controls (minimize, maximize, close) in the top right corner.

## Competition

'Competition' allows you to keep track of your competitors' products.



You can search by product and you can also attach documents such as your competitor's specifications.

The screenshot shows a window titled "Competition" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a navigation bar with a back arrow, a left arrow, "18 OF 248", a right arrow, a forward arrow, a delete icon, a refresh icon, and a print icon. The main area contains several input fields and a list:

- Find Competitor's Product: SEARCH...
- Find Your Product: SEARCH...
- Competitor: Akzo Nobel (dropdown menu)
- Competitor's Product: BERMOCOLL EM7000FQ
- Equivalent: GMC-8110B
- Attachment: C:\Users\Martin\Documents\Archive\Attachments\0805050808REP\_150... (with an "Add" button)
- Notes: A large empty text area with a vertical scrollbar.