



## TRAINING NOTES

### Default youGROW Views for youGROW Users

Obviously, you can create whichever views you need to suit your needs, but below are some of the standard views we set up for clients, to enable you to focus on developing your CRM strategies.

View Name	Filter	Fields	Use
<b>Master View</b>	None	First Name Last Name Company State Business Phone Date First Sale 1st \$ Sale Date Last Sale Last \$ Sale Av \$ Sale Total No Sales Total \$ Sales	To see and sort all customers at a glance
<b>Query View</b>	Exclude from Marketing equals No	As above	Used to see just those clients/cards you want to communicate with
<b>New Customers Last Week</b>	Date 1st Sale is "Last Week"	As above	To send thank you letters
<b>Returning Customers Last week</b>	Date Last Sale is Last Week, and Total No Sales is more than 1	As above	To see all customers who bought from you last week, other than new customers. This view is great to actually make a phone call and thank returning customers



## TRAINING NOTES

View Name	Filter	Fields	Use									
<p>Find items that match these criteria:</p> <table border="1"> <tr> <td>Date Last Sale</td> <td>last week</td> </tr> <tr> <td>Total No. Sales</td> <td>is more than 1</td> </tr> </table>				Date Last Sale	last week	Total No. Sales	is more than 1					
Date Last Sale	last week											
Total No. Sales	is more than 1											
<b>Outstanding Balance Customers (MYOB Accounting Interface only)</b>	Current Balance is more than 0	Add in, Current Balance, Av Days for Payment, and Date Last Open Invoice	See at a glance who owes you money, and what their average payment days are to determine what action you take. Mail merge to email for Outstanding accounts works really well for following up, rather than just sending a copy of the Statement									
<p>Find items that match these criteria:</p> <table border="1"> <tr> <td>Current Balance</td> <td>is more than 0</td> </tr> </table>				Current Balance	is more than 0							
Current Balance	is more than 0											
<b>Customers No Sales</b>	Total No Sales equals 0	As per Master View	To see who you have entered into your database previously, but have never bought from you. What contact strategy will you use to get them to buy?									
<p>Define more criteria:</p> <table border="1"> <tr> <td>Field</td> <td>Condition:</td> <td>Value:</td> </tr> <tr> <td>Total No. Sales</td> <td>equals</td> <td>0</td> </tr> <tr> <td colspan="3" style="text-align: right;"><input type="button" value="Add to List"/></td> </tr> </table>				Field	Condition:	Value:	Total No. Sales	equals	0	<input type="button" value="Add to List"/>		
Field	Condition:	Value:										
Total No. Sales	equals	0										
<input type="button" value="Add to List"/>												
<b>Once Only Customers</b>	Total No Sales equals 1 and Date last sale 6 months ago (or whatever time frame you want)	As per Master View	To see who has only bought once from you, and to determine a strategy to reconnect with these customers based on their date first sale. It is easier to sell to existing									



## TRAINING NOTES

View Name	Filter	Fields	Use						
			customers than find new customers						
<p>Find items that match these criteria:</p> <table border="1"> <tr> <td>Total No. Sales</td> <td>equals</td> <td>1</td> </tr> <tr> <td>Date Last Sale</td> <td>on or before</td> <td>6 months ago</td> </tr> </table>				Total No. Sales	equals	1	Date Last Sale	on or before	6 months ago
Total No. Sales	equals	1							
Date Last Sale	on or before	6 months ago							
<b>No Sales Last 12 months</b>	Date Last Sale on or before "12 months ago"	As per Master View	This is a dynamic view which continually updates to show those customers who have not bought in the 12 months since the current date. Used to determine a contact strategy for inactive customers						
<p>Field Condition: Value:</p> <p>Date Last Sale on or before 12 months ago</p> <p>Add to List</p>									
<b>Sales Pipeline View</b>	Pipeline Sales Stage is not empty	Add in all Pipeline Fields except Exclude from Marketing.	To see current opportunities at a glance.						
<p>Define more criteria:</p> <p>Field Condition: Value:</p> <p>Pipeline Sales Stage is not empty</p> <p>Add to List</p>									