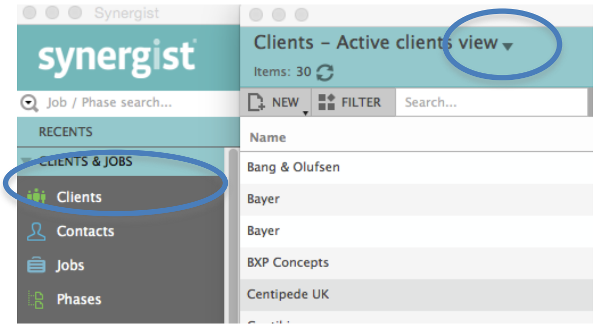
Categorising Clients and Prospects

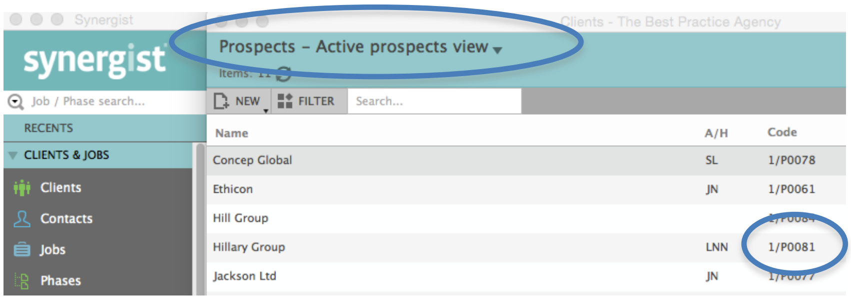
Most Synergist reporting is easily ordered by Client, Job or by Handler. However, applying different categories to your Client or Prospect data can enhance the level of reporting available.

Organisations within Synergist can be one of three types:

- **Clients**
- **Prospects**
- **Leads** – *NB Leads are only available within Synergist if your Company has the additional Sales & Marketing module. Please contact us if you would like to know more information.*

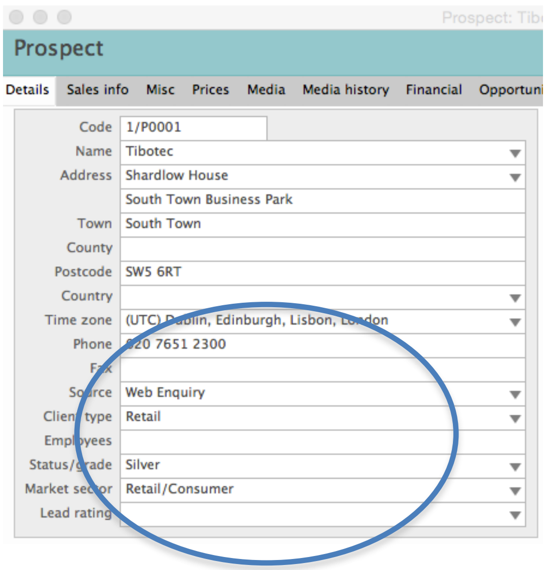


Clicking on the triangle to change the **Active Client view** to load an **Active Prospect view** may reveal an additional list of prospective organisations. Prospects are Companies that have an auto generated 'P' code. They can have an Opportunity created against them, time recorded and purchases or expenses raised against the opportunities but they cannot be invoiced. A Prospect must be promoted to a Client record and a code, which often links to a finance system, must be created.



Categorising Clients or Prospects

Within each Client or Prospect record, located on the details tab, there are a number of additional fields that can be populated. Once Clients or Prospects are linked or tagged in these additional fields, standard reporting can be filtered or ordered by this data.



Source

Source of Organisation is optional to use. This field has a selection of suggested entries e.g. employee or external referral, Web Enquiry etc. It is used to indicate the source of the organisation. The source might be from a list of data that has been purchased or perhaps where contact was made at a Networking event. Useful for reporting on Opportunities won or lost by source.

"Attending a named networking Event last year generated £250,000 of opportunities"

Client Type

Client Type is another optional to use field. Often used in conjunction with Market Sector to show a category of Client.

E.g. 1. Market Sector = Education, Client Type = Further Education colleges or Universities.

E.g. 2. Client type used for filtering type of Organisation for marketing purposes e.g. B2B or B2C

Status/Grade

Organisations, which could be Clients or Prospects, can be categorised using Status/Grade. Suggested grades of Bronze/Silver/Gold are listed. These can be replaced with your own terminology for rating how good or suitable a Client or Prospect is rated to your Company.

E.g. Red/Amber/Green or A* - C

Market Sector

Market Sector is a standard terminology relating to the area of business of the Client or Prospect. Once your Client records are categorised as belonging to a certain Market Sector, standard and data viewer reporting can be filtered by Market Sector.

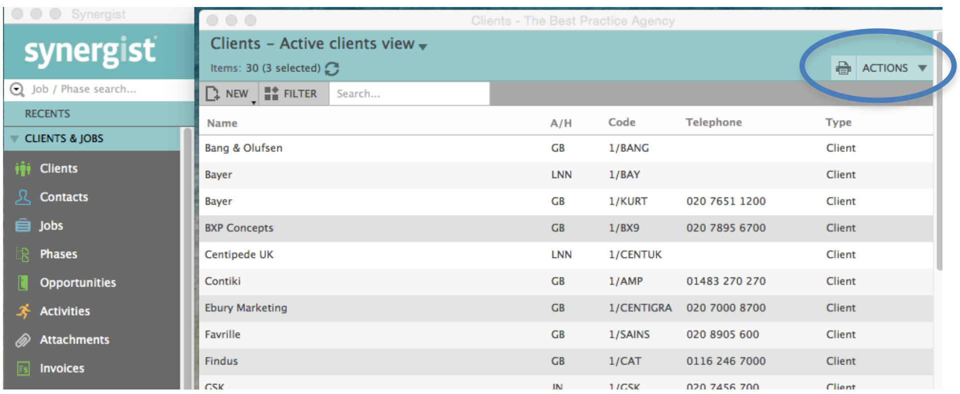
"My end of year analysis to show 'Turnover by Market Sector' was such a simple report"

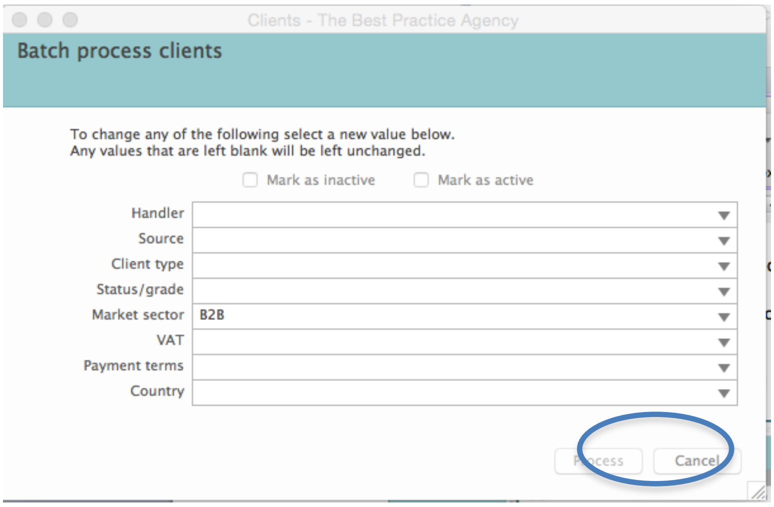
Batch Updating

To ease this data cleansing process then why not ***batch update*** your client or prospects.

1. Go to your Client or prospect list and use the shift or control keys to multi select records to be updated.

2. Click **Actions** and select **Batch update** from the options list.





3. Select the criteria that you wish to be updated and click **Process.**

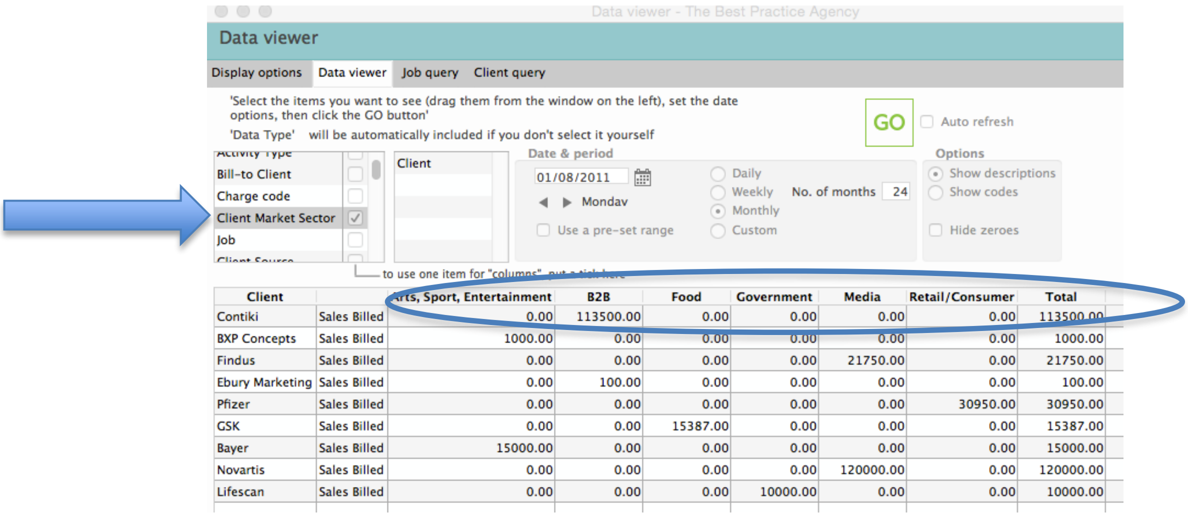
4. Repeat for each batch update.

Reports

Both Standard and data viewer reports support the use of Client categorisation fields.
By applying a Client category filter then the same Synergist report that is already in use could provide alternative data.

The Data Viewer

Market Sector, Client type & Source are all available to be selected as report columns in the data viewer.



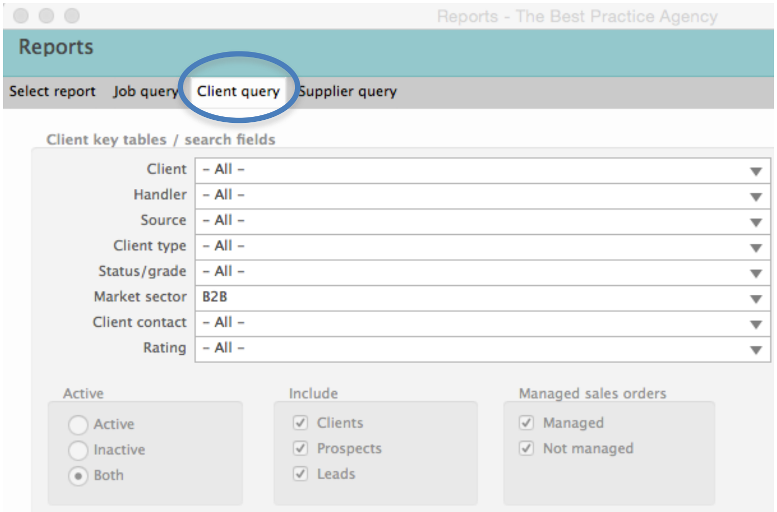
Client		Arts, Sport, Entertainment	B2B	Food	Government	Media	Retail/Consumer	Total
Contiki	Sales Billed	0.00	113500.00	0.00	0.00	0.00	0.00	113500.00
BXP Concepts	Sales Billed	1000.00	0.00	0.00	0.00	0.00	0.00	1000.00
Findus	Sales Billed	0.00	0.00	0.00	0.00	21750.00	0.00	21750.00
Ebury Marketing	Sales Billed	0.00	100.00	0.00	0.00	0.00	0.00	100.00
Pfizer	Sales Billed	0.00	0.00	0.00	0.00	0.00	30950.00	30950.00
GSK	Sales Billed	0.00	0.00	15387.00	0.00	0.00	0.00	15387.00
Bayer	Sales Billed	15000.00	0.00	0.00	0.00	0.00	0.00	15000.00
Novartis	Sales Billed	0.00	0.00	0.00	0.00	120000.00	0.00	120000.00
Lifescan	Sales Billed	0.00	0.00	0.00	10000.00	0.00	0.00	10000.00

*Try reporting on Sales invoices over a 12 month period with **Market Sector** ticked. The column heading changes from the month to the Market Sector.*

Standard Reports

Market Sector, Client type & source won't feature as a column on a standard report. However they can be used as a filter method. Select your standard report, e.g. Period Invoice Date Profitability and go to the Client Query Tab. To report on profitability for clients within the Market Sector "B2B", select this from the drop down menu by clicking on the triangle at the right of the data field.

.



Please contact The Agency Works at clientservices@taw.co.uk

Or

01455 553246

If you wish to discuss further reporting by category of

Clients and Prospects within the data viewer.