



CUC Software, Inc.

1645 Ave D, Suite A
Billings, MT 59102

Phone: 800-272-9908
Fax: 406-254-9679

Email: sales@cucsoft.com
Web: www.cucsoft.com

CONTRACTOR ESSENTIALS[®] - THE MARKETING MANAGER MODULE[®]

The Marketing Manager[®] module in CUC Software's Contractor Essentials[®] is a powerful data mining and reporting tool designed to provide your business with a number of sales and marketing tools including:

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|-------------------------------------|----------------------------|
| Microsoft Word Document Creating | Lead Maintenance & Reports |
| Mailing Activities | Referral Source Tracking |
| Scheduling Screen for All Employees | Proposed Service Contracts |
| Equipment Cost Analysis Reporting | |

MICROSOFT WORD DOCUMENT CREATING

The MS Word[®] Document Creating interface function under the Marketing Module on the Specialties menu allows you to create and/or format form letters, contracts, reminders, collection letters etc. with merge fields in Microsoft Word[®]. Documents can be created and formatted using merge fields from customer, lead and service contract data in your Essentials database. The Marketing Mailing function uses various sort criteria to propagate the fields in these documents.

MAILING ACTIVITIES

The Mailing Activities selection under the Marketing Module on the Specialties menu allows you to print lists, labels or mail merge documents based on an extensive array of options or marketing criteria for leads and customers. For example, you can select to send:

- Renewal letters to everyone who has a maintenance agreement due to expire next month
- Thank you letters to new customers acquired last month
- Collection letters for everyone whose account is past due
- Reminder letters to everyone who did not have a service /maintenance call in the last year
- Recall notifications to everyone who has a specific model of equipment
- Many, many more options are available...

LEAD MAINTENANCE & REPORTS

Salespeople can set up and track sales leads. Leads can then be converted to customers with the click of a button, preserving valuable sales notes and other information on the customer record. In addition, a number of reports can be run on leads to help sales managers analyze leads with regard to referral sources (advertising), salespeople, lead types and/or lead ratings.

REFERRAL SOURCE TRACKING

The Customer Referral option allows you to track your advertising dollars by indicating how a lead came to you and/or how a customer found out about your company on each job. Reports are available by customer or by job to help you analyze where your advertising is most effective.

EQUIPMENT COST ANALYSIS REPORTING

Equipment Cost Analysis Reporting provides a sales tool to show your customers what it has cost them to maintain a piece or pieces of equipment at a given site over a specified period of time. As maintenance costs rise on older pieces of equipment, this visual can help your salespeople show customers the benefits of replacing older equipment with new, more efficient, equipment.