Client Sales Database

An excel based solution, which is macro free, enabling project managers and business owners to monitor the progress of all of their leads and sales, all in one place. If you need to monitor your sales and leads, take a look at the details below.

Have a comprehensive list of clients and sales

Track when last you have sold or followed up each lead

See how your clients compare

See how each product (or category) compare to each other

Easily see how many people require follow-ups each month

Sales, clients, and follow up requirements

See a sales breakdown per month

See a 12 month period of business and leads

See the next 3 months of upcoming follow-ups

Comprehensible and adaptable live report

And so much more…

Scroll down to see more about this product

General Settings	
Sales Person	Mr Sales
Days for Follow-up from Sale	10
Days for Follow-up from Last Contact	30

Product or Service List	
Product or Service 1	PS1
Product or Service 2	PS2
Product or Service 3	PS3
Product or Service 4	PS4
Product or Service 5	PS5
Product or Service 6	PS6
Product or Service 7	PS7
Product or Service 8	PS8
Product or Service 9	PS9
Product or Service 10	PS10

You will be able to assign up to 10 custom categories (or individual products or services), relating to the products or services sold. You will later be able to assign each clients spending to one or more of these categories, and see the resulting reports. Also, you can select the default contact period. This is the time from the sale (or previous contact period), when you next want to contact the client to seek further business or a product renewal (if required). You can select the default time frame (in months), which you can overwrite for individuals later if required. You can also set the follow-up period for sales and leads.

Client Database

Your Business
Mr Sales

	PRIMARY Contact Person				SECONDARY Contact Person							
Client Business Name	Contact Person	Mobile	Landline	Email	Contact Person	Mobile	Landline	Email	Number of Sales	Number of Leads	Value of Sales	Value of Leads
Business A	Person A	0000 000 0001	0000 000 0002	pa@email.co.uk	Person F	0000 000 0011	0000 000 0012	pf@email.co.uk	21	13	£1,555.00	£805.00
Business B	Person B	0000 000 0003	0000 000 0004	pb@email.co.uk	Person G	0000 000 0013	0000 000 0014	pg@email.co.uk	19	20	£1,334.00	£1,405.00
Business C	Person C	0000 000 0005	0000 000 0006	pc@email.co.uk					19	26	£1,296.00	£1,897.00
Business D	Person D	0000 000 0007	0000 000 0008	pd@email.co.uk					19	13	£1,340.00	£698.00
Business E	Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Person H	0000 000 0015	0000 000 0016	ph@email.co.uk	22	28	£1,650.00	£1,814.00

You can then capture the contact details of your clients. Phone numbers will take the form as below, and the email addresses become hyperlinks. You can sort or filter by any of the columns.

You can assign a primary and secondary contact person. These businesses will then be available for selection on the sales database tab, as well as being used to filter for a client on the report. You will be able to assign each lead or sale to one of these clients.

Sales Database

Your Business
Mr Sales

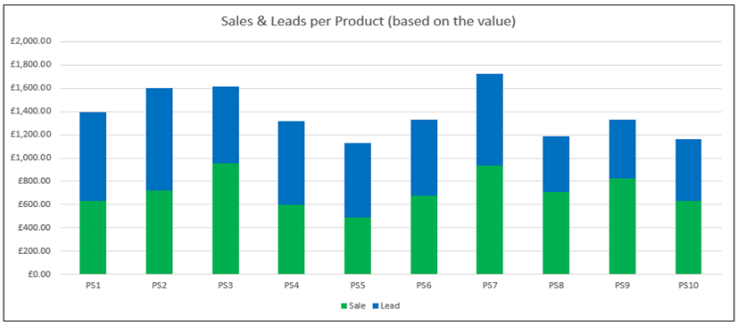
Follow-up Required	2
Live Lead	100
Sale Confirmed	98

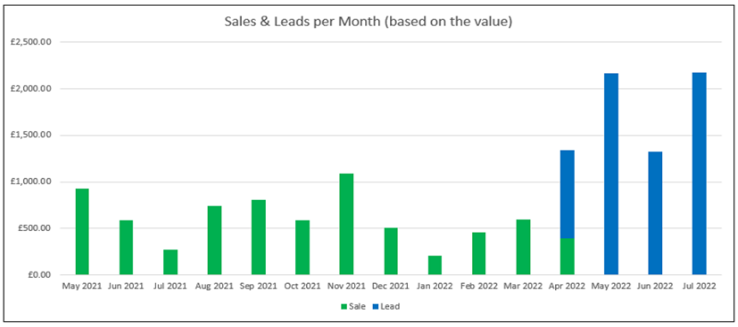
Enter the val

Contact Person	Mobile	Landline	Email Address	Client	Contact	Last Contact Date	Sales Date	Follow Up Date	Item 1	Item 2	Item 3	Item 4
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		13/10/2021		25/07/2022				
Person D	0000 000 0007	0000 000 0008	pd@email.co.uk	Business D		20/05/2021	01/10/2021	22/07/2022				
Person A	0000 000 0001	0000 000 0002	pa@email.co.uk	Business A		26/03/2022	30/08/2021	12/07/2022				
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		18/11/2021	18/10/2021	11/07/2022		£66.00		
Person B	0000 000 0003	0000 000 0004	pb@email.co.uk	Business B		29/07/2021		23/04/2022				£62.00
Person F	0000 000 0011	0000 000 0012	pf@email.co.uk	Business A	Secondary	21/02/2022	10/02/2022	01/05/2022		£89.00		
Person D	0000 000 0007	0000 000 0008	pd@email.co.uk	Business D		16/07/2021		25/04/2022	£94.00			
Person D	0000 000 0007	0000 000 0008	pd@email.co.uk	Business D		10/06/2021	19/03/2022	26/04/2022	£92.00	£81.00		
Person G	0000 000 0013	0000 000 0014	pg@email.co.uk	Business B	Secondary	21/05/2021		30/05/2022				
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		02/01/2022		29/07/2022				
Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Business E		22/09/2021		02/05/2022		£79.00		
Person A	0000 000 0001	0000 000 0002	pa@email.co.uk	Business A		12/10/2021	19/04/2022	29/06/2022				
Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Business E		31/12/2021	29/03/2022	19/07/2022				
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		16/11/2021		02/07/2022	£31.00			
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		02/02/2022		06/06/2022				
Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Business E		31/07/2021	12/11/2021	01/06/2022			£89.00	
Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Business E		12/03/2022		17/05/2022		£94.00		
Person B	0000 000 0003	0000 000 0004	pb@email.co.uk	Business B		10/09/2021		26/05/2022				
Person B	0000 000 0003	0000 000 0004	pb@email.co.uk	Business B		12/09/2021	05/06/2021	13/06/2022			£98.00	
Person E	0000 000 0009	0000 000 0010	pe@email.co.uk	Business E		13/08/2021		06/07/2022				
Person H	0000 000 0015	0000 000 0016	ph@email.co.uk	Business E	Secondary	01/12/2021	02/05/2021	17/05/2022				
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		14/05/2021		21/05/2022				
Person D	0000 000 0007	0000 000 0008	pd@email.co.uk	Business D		19/10/2021		21/05/2022			£84.00	
Person A	0000 000 0001	0000 000 0002	pa@email.co.uk	Business A		10/02/2022		14/06/2022		£74.00		
Person G	0000 000 0013	0000 000 0014	pg@email.co.uk	Business B	Secondary	22/09/2021	29/03/2022	02/06/2022				
Person C	0000 000 0005	0000 000 0006	pc@email.co.uk	Business C		02/05/2021	21/05/2021	24/06/2022			£46.00	

After inputting contact details, put in the last date when you contacted (or sold to) the person, input the relevant price paid to the relevant column, and select the next follow up date (which you can overwrite if required). Each time you follow up with a client, or sell them a product, update the relevant details to keep them as up to date as possible.

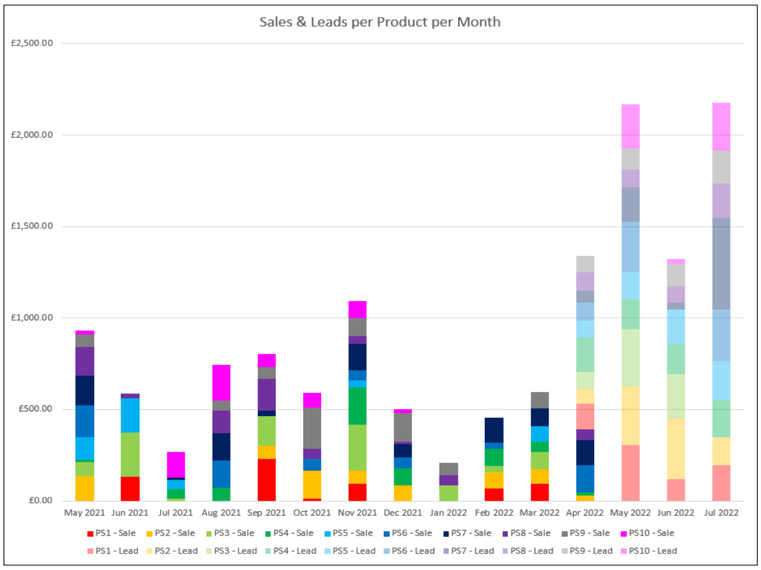
You can enter a sale date when the sale is complete, otherwise an entry will be classified as a lead. Either way, you can assign a follow-up date (suggested calculated date with over-ride option) for each lead or sale.





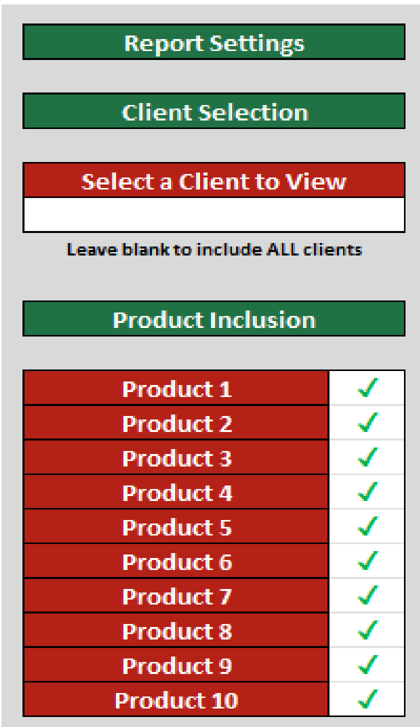
At any stage, if you are happy that your data is up to date, you can click on the report tab and see any of these graphs.

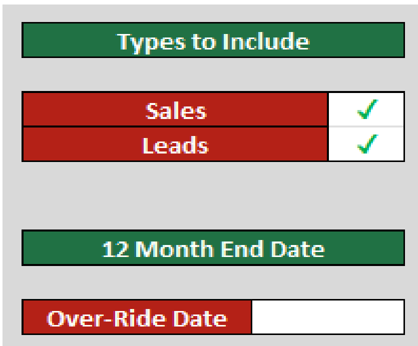
You can see the sales and leads per product (or category) based on their values. You can see the completed sales and upcoming lead follow-ups per month. You can also see the number of upcoming follow-ups per month (sales and leads).



You can also see a complete breakdown of sales and leads per product per month, for the last 12 months and 3 months into the future (potential sales). There are two graphs, one based on value, and the other based on the number of leads per category.

These show solid colours for sales, and transparent colours for leads, and are all colour co-ordinated and shown per month.





You have control over what data goes into the report.

You can select what products/categories to include. You can select what date range to use and also whether to include sales, leads, or both. You can even select a client, in order to view the data for that client only.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.
All the other links you may need for more information, or to purchase this product, are below.

In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£190

This product is created by:

SPREADSHEET SOLUTIONS
Creating business solutions through custom spreadsheets
www.spreadsheetsolutions.biz