

Activity Recap Email Solution



Increase Executional Productivity and Efficiency with Easy, Timely Collaboration

Features

- Maximize your team's efforts in the field with this great collaboration tool
- Automatically communicate key account execution with stakeholders to ensure nothing slips through the cracks
- Share Account Call notes and follow up tasks in an actionable manner
- Send email summaries of key account activity to management to inform of execution against strategic activity goals and objectives
- Automatically include all relevant Account and Activity data fields and comments for reference to make each communication actionable
- Summarize all GreatVines account activity by User, Brand, Territory or Distributor through the wizard to produce relevant communications quickly and easily

A screenshot of the GreatVines web application interface. At the top, there is a navigation bar with the GreatVines logo on the left, a search bar in the center, and a user profile dropdown on the right labeled "GreatVines Sales Rep". Below the navigation bar is a menu with items: Home, Chatter, Accounts, Contacts, Objectives, Activity Reports (highlighted), Dashboard Sales Rep, Authorizations, and Libraries. The main content area is titled "GreatVines Activity Reports" and contains a "GreatVines Activity Summary Report" section. This section has three buttons: "Run Report", "Create Template", and "Email". Below these buttons is a form with the instruction "Please select from the following options and click 'Run Report'". The form includes: "Report Type" set to "By User"; "Start Date" set to "10/1/2016" with a range selector "[11/30/2016]"; "End Date" set to "11/30/2016" with a range selector "[11/30/2016]"; "Select User" with two dropdowns, both showing "User" and "GreatVines Admin"; "Include Feedback" checked; "Include Activities" checked; "Record Type" set to "---All---"; and "Filter" set to "--None--".

BOTTOM LINE

Get more value out of your selling efforts by enabling your team to easily communicate in real-time with your 3-tier partners or internal management team. It is a great way to quickly and effectively review and take action on work-withs, team blitzes, crew-drives or market visits.

greatvines.com
888.547.4505



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Features (continued)

- Configure automatic emails to be sent daily, weekly or monthly
- Administrators may define custom Account filters and sorting criteria and schedule the custom reports to be emailed
- Email reports automatically include “Feedback” box for inline responses from stakeholders
- Friendly report format which summarizes activities related to Account visits

Account	Subject	Created By ID	Date of Call	Person Contacted
Hideout Lounge	Account Visit	GreatVines Admin	9/13/2016 1:16 PM	Ron Fleming
Comments	Met with Ron about the new vintage. Schedule winemaker dinner for November			

By the Glass	Label	Price	Listing	Start Date
	Jones Chardonnay	8.99	Bar Menu; Cocktail/BTG Menu; Wine List	10/1/2016

Order Commitment	Order Commit Number	Commitment Date	Shipment Date	Status	Cases	Item
	ORC-000000273	9/13/2016	10/5/2016	Pending	2	2008 Jones Chardonnay 750ml

Feedback

Account	Subject	Created By ID	Date of Call	Person Contacted
Hideout Lounge	Account Visit	GreatVines Admin	9/13/2016 11:51 AM	Cindy Sorenson
Comments	Met with Cindy about smoked Porter tap handle. I will reconnect in October right			

Handle	Label	Start Date	End Date
	Milk Stout	10/1/2016	12/31/2016

POS Placement	POS Item	Date Delivered
	Neon Sign	9/10/2016

Staff Training	Date	Label	People Trained	POS Details
	9/13/2016	Milk Stout	4	Left behind coasters and tshirts

Feedback

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