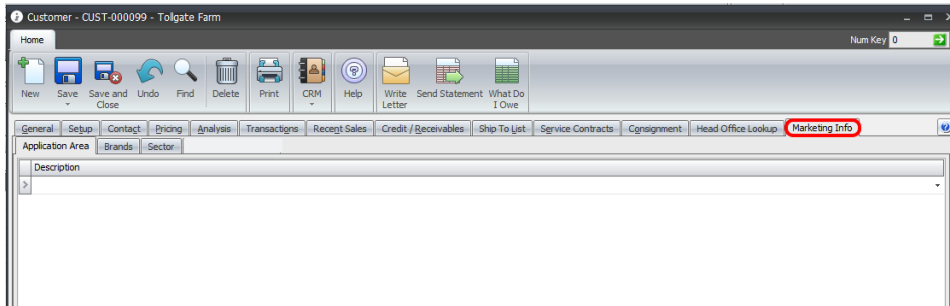




## Marketing Information Plug-In

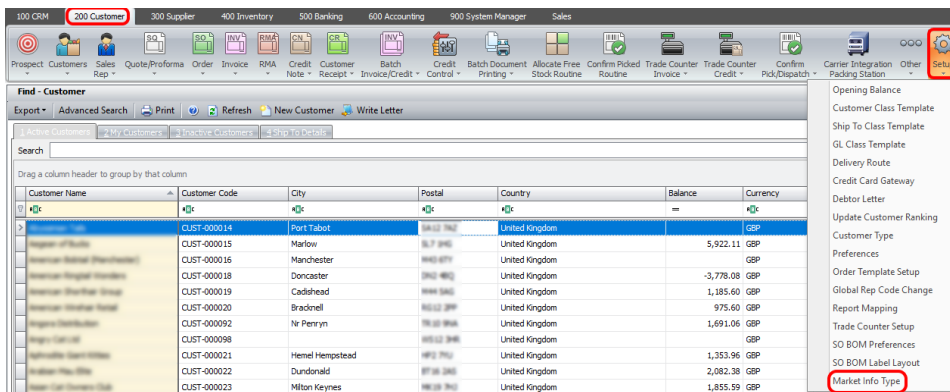
This plug-in offers you the flexibility to store additional information about your customers and prospects.

Once installed, an additional tab, 'Marketing info', becomes available within the Customer and Prospect Record:



As standard the Application Area, Brands and Sector tabs are created as default.

The Marketing Information Type set up is found within the Customer Module > SetUp > Market Info Type



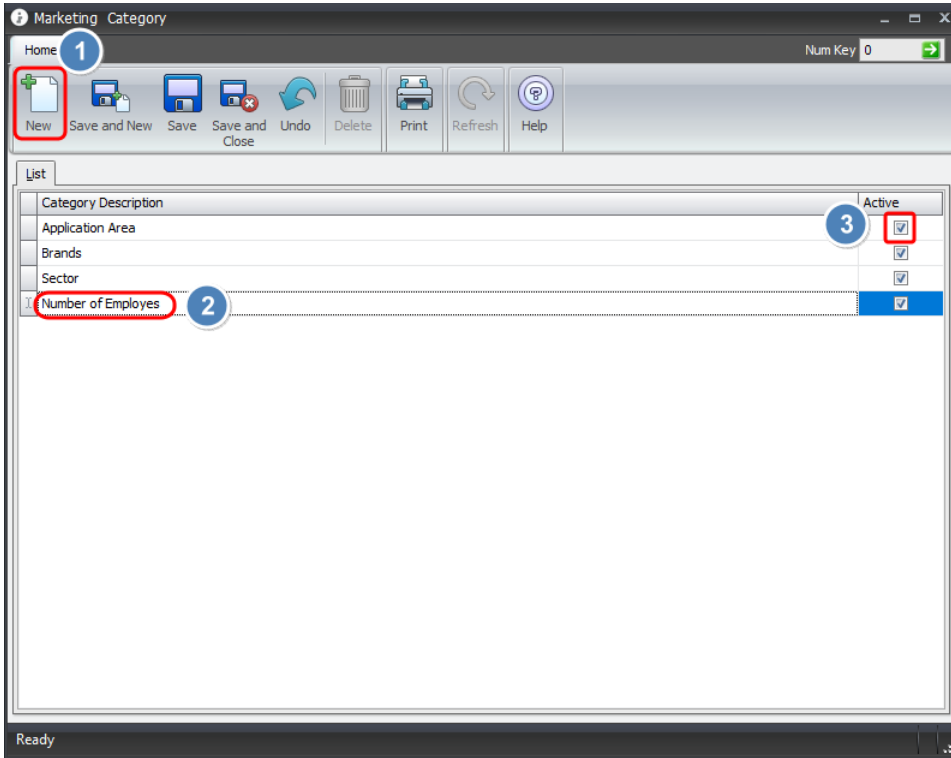
Click on the 'Market Info Category' button to create additional categories (tabs):



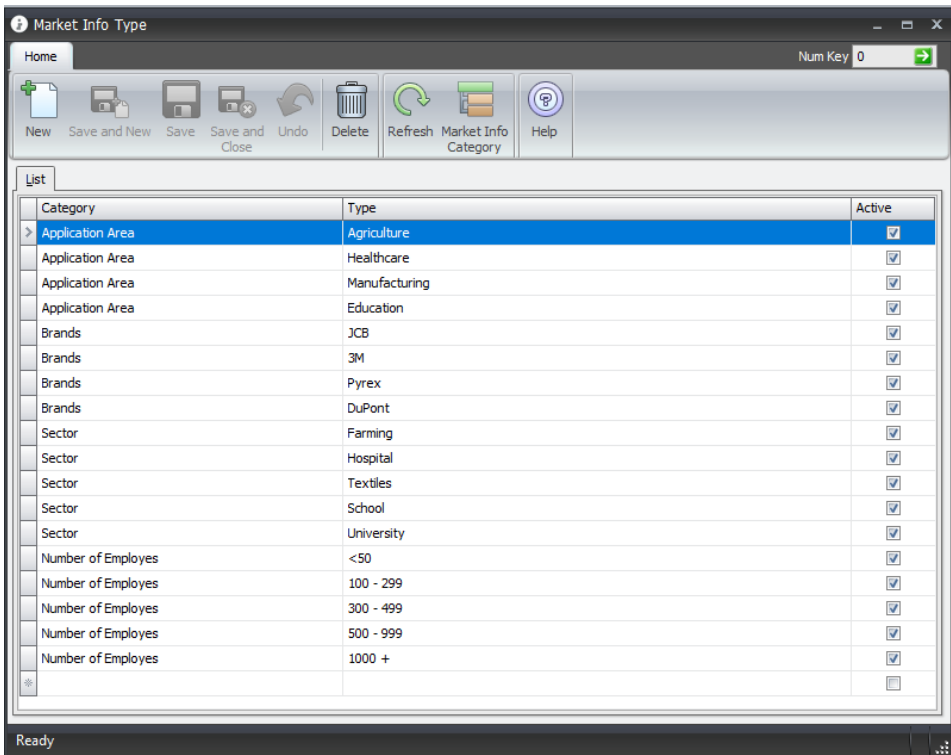


## Marketing Information Plug-In

1. To add a new category (tab) – click the 'New' button.
2. Type your description then Save and Close
3. Untick the Active box to make a category (tab) inactive – this will then be removed from the Customer Record



You can now create your list of Marketing Information.





## Marketing Information Plug-In

Click into the blank box below 'Category' and select from the dropdown list then free type in your 'Type' description – as shown in the image above.

These can then be assigned to your customers accordingly.

Open the customer record then:

1. Go to the Marketing Tab
2. Select the relevant Category Tab
3. Click on the dropdown and
4. Select the relevant Description

Remember to save your changes when exiting the customer record.

