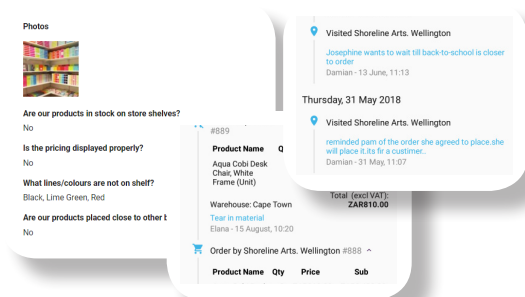




The Field Sales app

Customer History

Product Feature Focus



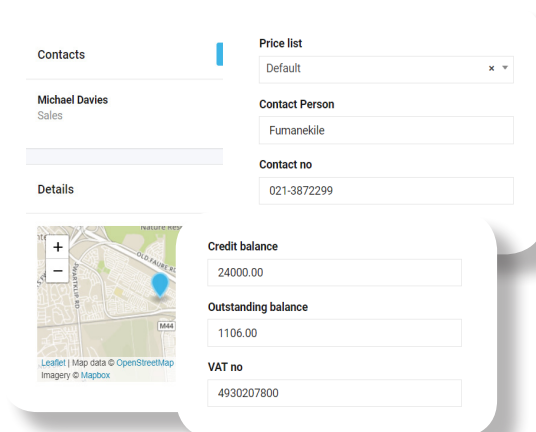
Know your customers

All customer details and history are in the palm of sales teams' hands, which means no more shifting through hand-written notes or searching for that email communication from months ago.

Customisable customer fields

You can add up to 250 customisable fields, such as:

- Contact information
- Visit frequency
- Sales rep/s associated to the customer
- Credit balances
- Amount outstanding
- Customer's industry
- Associated or nearest warehouse
- Pricelist associated to a customer



Watch sales soar.



Never walk in unprepared again

Complete customer visit history is available in one glance, which means sales teams can review the history of all interactions with the customer before starting a visit.

A more detailed overview available on:

- Sales Overview
- Tasks associated to a customer
- Upload files – such as contracts
- The last date a customer was visited
- How many orders, quotes and credit requests a customer has placed
- Surveys completed at the customer
- Forms completed at the customer
- Stocked products
- Top ordered products
- Products a customer has never ordered

New info can be added / edited at any time and then instantly synced so that customer data is kept up-to-date on every sales person's device and on the manager's web platform.

Get in touch

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