Factsheet

Vecta Summary factsheet

Vecta - Key functionality Summarised

This document highlights the key features available within Vecta.

Vecta is an on-line Sales Analytics and CRM solution, secured within a Data Centre and accessible to authorised users over the public internet within a modern Browser environment. Sales analysis and customer data, provided to Kerridge Commercial Systems Ltd (KCS) in the specified format, is uploaded into Vecta by KCS on a pre-agreed frequency.

Key data typically uploaded includes select information about customers, products and sales. Once uploaded into Vecta, the data may then be accessed and analysed by authorised personnel. Although there is a degree of flexibility in the data fields that may be populated, key data that is usually uploaded on a customer's behalf includes:

- Company Analysis such as:
  - Account representative; Business type
  - Credit status
- Contact details
- Product details
- Sales transactional detail

Key features of Vecta include the ability to analyse uploaded data and to view defined exceptions to update contact, prospect and customer details. In addition, tasks and activities may be recorded.

Subject to security settings and authorisation, users may access a full or a subset of the available data and a number of functions:

Sales Analysis Enquiries

- View sales results by values, such as sales value, cost, margin, quantity sold.
- Create reports and enquiries from the available views on demand.
- Save enquiries as favourites and allocate to selected users or groups of user
- Alter view to display by any of the analysis values held in the database or for any available date range.
- Filter, with options to include/exclude, based upon any of the displayed analysis values
- Save enquiry results to Excel, .CSV, PDF or Word subject to user authorisation level

Alerts

- Ability to create custom alerts based upon the analysis values contained within the sales data, such as customer, product or salesperson performance or margin erosion.
- Filter alert based upon any of the analysis values, such as product group, customer or salesperson
- Proactively notify users of changes in data, such as customers who are not buying products historically purchased, customers buying products from Group A but not Group B or margins which are now reducing
- Display alert results within the Home and/or Customer Dashboard
- Generate customer list from the alert criteria or export results

Diary

- Appointments and tasks may be maintained and viewed within the diary. Optionally, tasks and appointments created within the diary may be synchronised with Exchange Server 10 and above or Office 365 Calendars
- The diary may be viewed as a list; by day, by week and by month. It is also possible to filter the views within the diary (i.e. specific activity types, users). Drag and drop facilities are provided to enable diary entries to be moved between dates/times.
- Link from diary entry through to associated customer

Tasks and Activities

- Tasks are used to record activities such as appointments, events or call log. Tasks may be active i.e. they require a specified action by a certain date/time, or may be used to record events that require no further action.
- Tasks may optionally be linked to a customer or contact
- Tasks may be created by an individual and allocated to themselves or to others
- Tasks may be created to represent regular recurring activities
- The list of outstanding tasks may be used as a call list
- Follow-on tasks may be created when updating or completing an existing task
- Filter and view tasks, subject to authorisation controls

Activity Enquiries

- View and filter activity by type, user, company, salesperson
- Create tasks directly from any activity enquiry being displayed by company

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Projects

- Ability to create and update a project.
- View progress on each project
- Link tasks to each project
- Move a project through the pre-defined workflow stages

Pipeline

- View and amend opportunities within the pipeline
- Record opportunities against both customers and prospects
- Maintain individual pipeline name and stages, probabilities can optionally be recorded against each stage
- Filter view of pipeline based on stage, owner or by due date and drill into opportunities within the pipeline

Opportunity and Project Enquiries

- Select required pipeline or project and view values, with display by, or drill down to opportunities and projects
- View opportunities by customer/salesperson
- View opportunities by stage
- View opportunities by product

Favourites

- Ability to save enquiries as user favourites
- Enable favourites to be shared with an individual(s) or group of users
- Create favourite categories to group a number of like favourite enquiries

User Preferences

- Although the security settings/workflow are defined by the Systems Administrator from the available options, a limited capability is provided for each user to set their own personal defaults.
- Default system language
- Preferred default task type
- Number of records that can be viewed within each enquiry page
- Filter to initially apply to the Home Dashboard items
- Columns to be displayed within Project Dashboard
- Activities that should synchronise by default with Exchange Server or Office 365 if in use

User Maintenance

- Enable the creation of users and maintenance of profile (typically an administration function)
- Update users database functionality access rights
- Create and update user data access rights
- Create user groups

Target Maintenance

- Maintain target data manually
- Import target data
- Multiple target sets may be maintained, together with the level of analysis for each e.g. product group, product, customer, territory

A range of standard dashboards are supplied with the product, with limited editing options, and applied to a user or a group. Dashboards also contain print options. These Dashboards include:

Home Dashboards

- Can be customised (typically as Admin function) from a selection of available display items to show:
- Factual sales information summaries
- Activity Summary
- Customer performance and variations on comparative periods
- Performance versus targets
- Actions due
- Exceptions or link sell opportunities as created within Vecta Alerts

Analysis Dashboard

- Accessed by choosing required analysis from available options
- Dashboard items display further levels of detail for the chosen analysis value
- Ability to run enquiry to expand on individual selected dashboard item content

Customer Dashboard

Once a customer is selected, a number of tab Sales Dashboards are available on the Dashboard:

- **Sales** – a summary view of transactional data relevant to the selected customer, with drill down through the data to imported analysis fields.
- **Details** – a customer record card, including name and address, contacts, analysis data loaded such as account manager, industry, credit status, outstanding balances.
- **Activity** – any tasks and activities recorded against the selected customer
- **Opportunities** – Add and maintain opportunities for the selected customer, with options to record values and monitor progress.
- **Projects** – Maintain projects for the selected customer, update and monitor progress
- **Documents** – Upload and view documents for the selected customer
- **Emails** – Store and view emails that have been uploaded to the selected customer. Emails to a contact with a unique email address held in Vecta may be forwarded or copied to a unique Vecta email address, these are then automatically saved within the Vecta customer email tab.
- **Images** – Upload and view images associated with the selected customer

About Kerridge Commercial Systems (KCS)

We provide specialist software, services and support to deliver fully integrated trading and business management solutions to distributive trades customers, large and small – wherever they are in the world. Immersed in the distributive trades for over 40 years, our technical experts are thought leaders in trading and management technology, and our innovative and flexible approach ensures our customers partner with us for the long-term.

Our mission is simple: to design and deliver high performance, integrated ERP solutions that enable our distributive trade customers to source effectively, stock efficiently, sell profitably and service competitively.

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