Whats New in Salesmatrix V3

Salesmatrix v3 builds on the strengths of Salesmatrix version 2. The wealth of feedback provided by Salesmatrix users over the past 3 years, has resulted in a product that is more powerful, easier to use and provides more useful business knowledge than ever before.

The following lists the key feature enhancements incorporated into Salesmatrix version 3. It does not cover minor bug fixes or subtle changes to improve functionality.

1. No limit to grid Columns
   In version 2 of Salesmatrix, users were limited to views of up to 250 columns. Values from columns greater than the 250-column limit were lumped into a column called sundry items. Now it is possible to see columns up to a limit of 2million. Of course, this is dependant on memory resources in the users machine, but Salesmatrix v3 has been tested on grids of greater than 2 million cells (e.g. 2000 columns by 1000 rows)

2. Updated XP standard interface
   New style icons have been introduced and the interface has been altered in subtle ways to give users
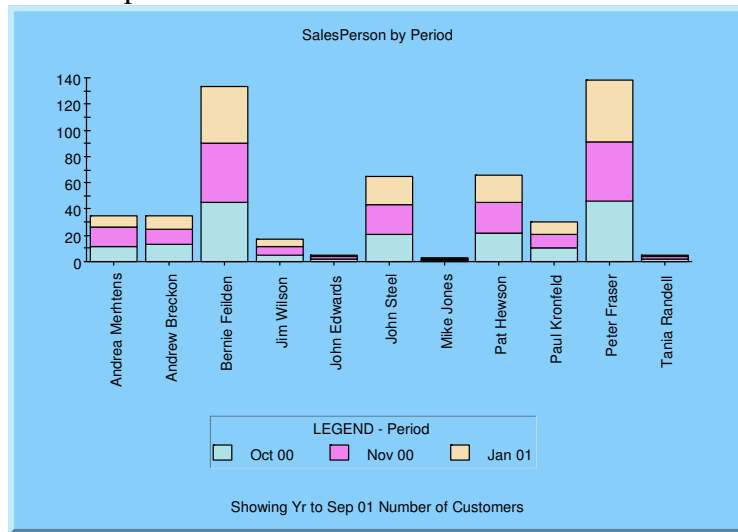

   a more modern software experience. See attached screen shots.

3. New Graphics module

SalesPerson by Period

LEGEND - Period
☐ Oct 00   ▇ Nov 00   ☐ Jan 01

Showing Yr to Sep 01 Number of Customers

A powerful graphics module has been added to Salesmatrix to facilitate the graphing of any column or row in the Salesmatrix grid. Surrounding rows/columns can also be graphed for comparative purposes with a few mouse clicks. Output can be easily saved to disk, copied to other windows applications or sent to print.

4. Quadrants mode

The customer aspect has been extended from 2 categories to 5. The quadrant mode allows the

Customer Quadrant View

Region by Retention for all Salesman
Showing Feb 2005 Year Number of Customers ▾

Region	Total	Gained	Re-gained	Retained - Increased	Retained - Decreased	Lost
Central NI	22	0	1	20	1	0
Chch	9	0	0	7	2	0
Hawkes Bay	27	0	0	23	4	0
North Auckland	17	0	0	15	2	0
Northern SI	12	0	0	6	5	1
Otago Sthland	13	0	2	3	6	1
South Auckland	23	0	2	17	4	0
Special Accounts	59	1	16	30	5	5
Unknown	23	0	1	16	4	0
Wellington	34	0	3	22	8	0
GRAND TOTAL	239	1	25	159	41	7

Views | Salesman

Region
  by Retention
  by Chains
  by Loyalty
  by CrossSell
Retention
Chains
Loyalty
CrossSell

customers aspect to be evaluated in category-by-category views. For example if the data is imported showing customers in regional and business type categories, after running a retention assessment, customer retention can be viewed in quadrant mode by region or business type.

Alternatively if you want to do textbook quadrant analysis of your customer base; e.g. key customers the business needs (relies on) versus customers who rely on our business, the category and quadrant tools easily allow this.

The drill down on each cell in quadrant mode shows all four aspects of the cell – Products, Customers, Sales channel and Period.

5. Simpler importing interface

The importing interface has been simplified to make the process easier and less confusing to first time users.

6. **Enhanced tracking for dataset properties and issue tracking**
   *A new option in the File menu allows users to see how and when the dataset was imported and any*
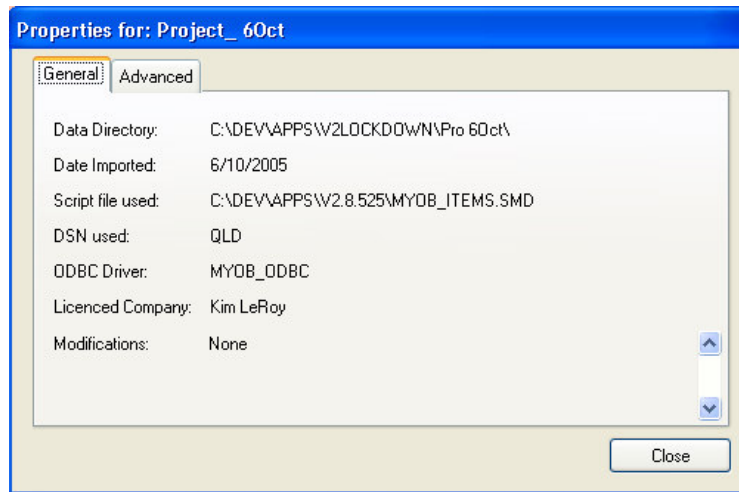
    modifications that have been made to the data since the import. The advanced tab shows the SQL used during the import assisting users who want to modify their current scripts, or check any perceived discrepancies in the dataset.
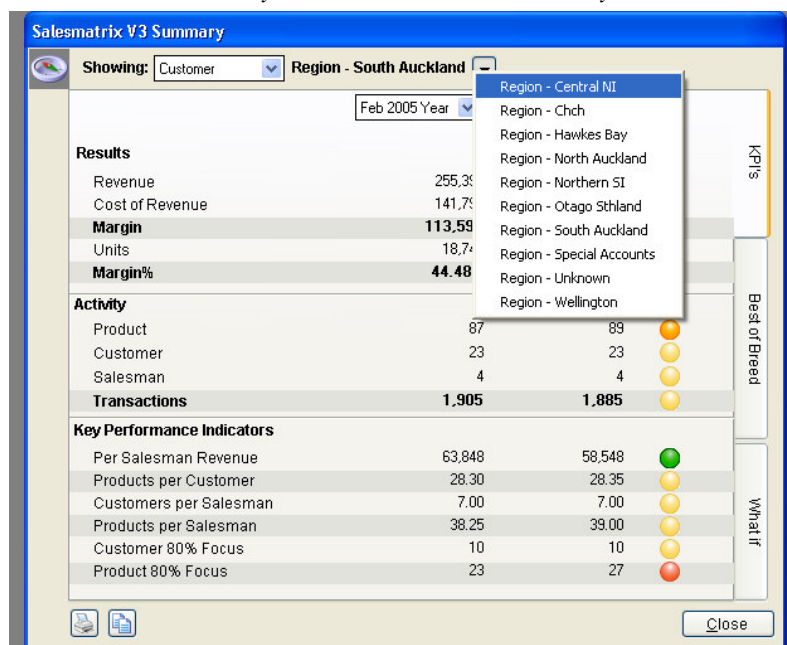
7. **PDF, RTF and MS Word output**
    All reports generated by Salesmatrix now have the option of being directly to PDF, RTF or MS
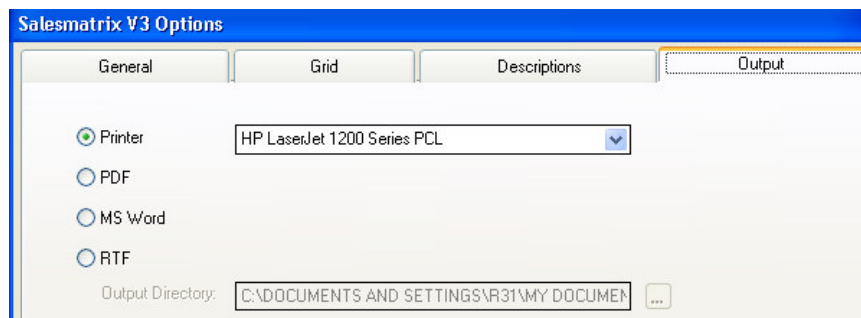
    Word. The users do not have to have a PDF writer installed – Salesmatrix v3 contains all the necessary routines.

8. **New dashboard summary with filters**
    The dashboard summary screen now contains the ability to view data using a filtering system. The

user is now able to view key data and KPI's by segment or individual aspect member. For example: one sales branch's performance, one chain of customer stores, or one supplier's items. The dashboard can also produce a summary report that can be directly used for a periodic sales report. New KPI's have been added to the interface

    a.   Revenue per sales channel
    b.   No. of Products purchased per customer
    c.   No. of Customers per sales channel
    d.   No. of Products sold per sales channel
    e.   No. of Customers and Products in the 80% focus

9.   Performance values on grid

New performance values have been added to the grid showing number of aspect items in each cell.

For example in Salesman by Period view, a user can now view the number of individual products a salesman sold in each period, and the number of customers he sold to. This is an extremely powerful new tool for analyzing the comparative performance of your sales team or your products in your market.

10.   Customizable traffic light colours

Something many users have requested – control over the colours of traffic lights. Users now have the

option for example of highlighting only the "Reds" or "Greens" of the traffic lights (pictured above), or changing the tones to suit the colour schemes of terminal server environment.

11.   New Licensing scheme

A new more secure licensing scheme has been introduced that will ultimately allow users to register and upgrade etc online.

12. Export of Dataset subsets

Possibly the most powerful new functionality. This option allows a user to create a filtered dataset

from an existing dataset. For example if the head office wants to send a Salesmatrix dataset to one supplier containing only that suppliers products, or send a dataset to one branch, sales team or salesman, this is now possible with a few click of the mouse – no scripting required!