

## Tracking eCRM Coupons in Mgmt SE

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Not every customer solicited through CRM will present the shop with the coupon(s) sent, but the mailing did it's job. People may call or drop by asking about their 112,500 mi. service. That doesn't happen all by itself! If you want to know how many did present coupons at time of service, read on. Let's take a look at two separate aspects to using the CRM coupons. The following is based on generalities as I don't know how your coupons are specifically built. 1. Usage of the CRM Coupons - why couldn't these be stored as either reduced price Canned Jobs or as a generically applied item? (LOFDISC set at -\$5.00, etc) 2. Tracking of the CRM Coupons - 5.7 software added a **Source** field on the order screen that can store references to each coupon (or anything else you can dream up; search the forum for some great ideas). These are flagged on the posted invoice to feed a new Source report. TIP: To add new entries for Source, go to the Order screen and

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