

# List Track

## Sales and Marketing Pack (List Track)

This optional license can be added for users of Project and Companies & People services. The main function of this additional service is to allow the tracking of companies and projects that the user has either phoned or mailed as part of their work.

The service gives the user five main benefits:

- Mark any company or project with a 'phoned' or 'mailed' indicator as the user works through each lead

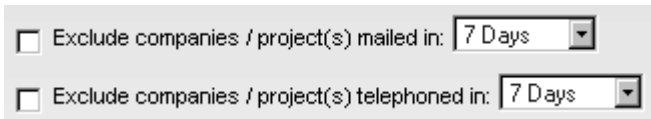
Mark as phoned (today)  
Mark as mailed (today)



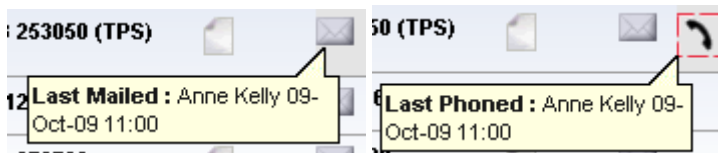
- Automatically mark companies as 'mailed' when using the Mail Merge feature



- Exclude companies or projects from new Mail Merge files using flexible cut-off dates for previous 'mailed' or 'phoned' indicators.



- See project or companies that other users have contacted.



- Find these contacted projects or companies using the Quick Search pages allowing follow-up.

Projects I have phoned  
Projects that others in my company have phoned  
Projects I have mailed  
Projects that others in my company have mailed

Users with the license will see additional columns for the 'mailed' and 'called' icons on project and company lists and detail pages. Additional actions to set and unset both 'mailed' and 'called' statuses are available from the dropdown Action menus on each of these pages.