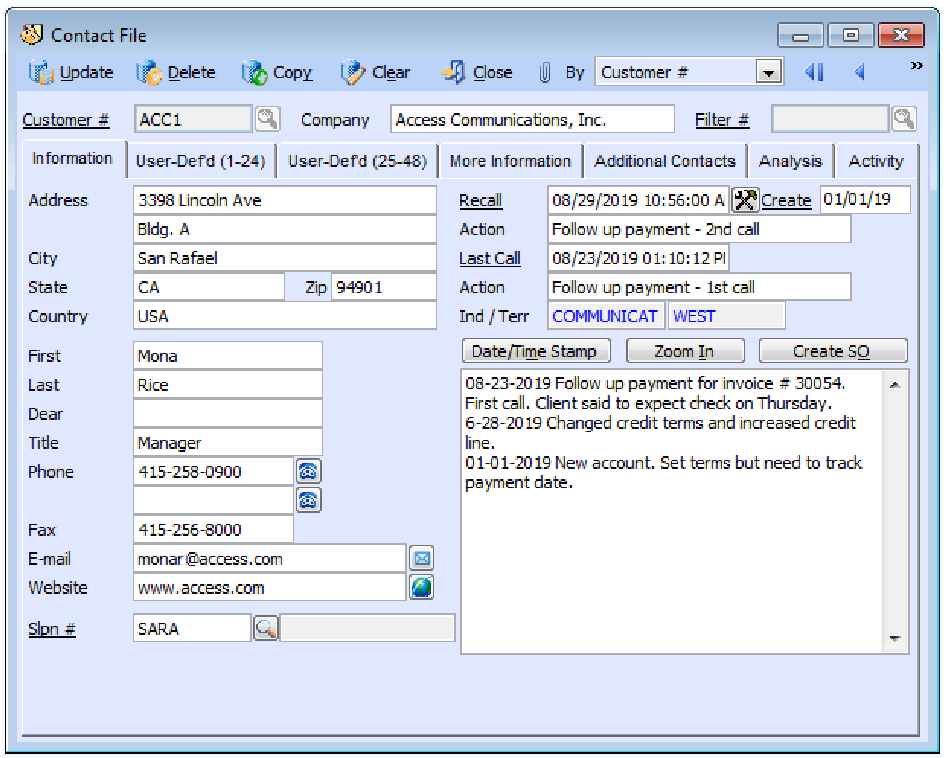
AccountMate

AccountMate's Contact Manager module is a full-featured contact management system that helps you manage interactions and work with your customers more effectively and efficiently. It works with the latest Microsoft Office products to provide a complete, automated system that offers an all-in-one solution for managing multiple customer contacts. This module is fully integrated with our accounting modules to avoid duplicate data entry and provide consistent data throughout the system.

AccountMate 12 for SQL or Express Contact Manager Module

Track Detailed Contact Activity

Use the Activity tab to record and track details about your interactions with the customer. You can create activity records to represent prospect sign-up, contract negotiation, customer complaints and anything else that may arise from being in contact with a customer or prospect. You can break down each activity into different stages (e.g. presales call, product demo, close sale, report problem or case resolution) to more accurately track the progress of these cases. You can also grant access rights to various AccountMate users who are allowed to view and/or update these activity entries.



Contact File – Information Tab

Enhanced Contact Management

You can quickly contact a customer or prospect, enter and review the salient points of each contact, track your communications in the order in which they occurred and perform mass mailing and/or e-mail distribution to customers and prospects. There are integrated email capabilities that utilize any of the popular Microsoft mail systems such as Microsoft Exchange or Microsoft Office and support direct e-mail communication with contacts and customers. The system also supports automatic modem-dialing so you can call customers and prospects directly from inside the AccountMate program.

Complete Information in Contact Records

Each record includes complete contact information: date/time stamped contact notes, contact name, title, company, address, fax and phone numbers, email address, last and next call dates, last and next action, industry and territory.

User-Defined Fields

You can add up to 48 user-defined fields to contact records. Contact Manager is easily customizable by assigning field names, type (character, date, logic or numeric), width and number of decimal places, if applicable, to each user-defined field.

Easy to Search Contact Management Database

Search and retrieve contact records by company name, contact name, zip code, telephone number, recall date, salesperson number or by using any of a wide variety of search filters. You can create your own search filters using the data fields that come standard with AccountMate and the user-defined fields that you added. Use the Mass Search and Replace function to quickly update data in one or more fields for all customers who meet the defined search criteria.

Seamless Integration with Microsoft Word

The Contact Manager module seamlessly integrates with Microsoft Word for easy mail merge and correspondence. This allows you to retrieve documents and labels created in Microsoft Word and customize and print them from within Contact Manager.

Integration with Sales order and Accounts Receivable Modules

When integrated with the Sales Order module, a sales quote or an order can be created directly from the Contact File screen and the document can be printed immediately thereafter. You can drill down from the Contact File screen to get instant access to sales order or sales quote details or quickly examine critical financial information such as accumulated-to-date (ATD) sales, SO backorders, open credits or outstanding balances without having to leave Contact Manager.

When integrated with the Accounts Receivable module, you can view invoice and payment transactions and summarize, compare or generate a graph representing the monthly transactions recorded for any customer.

Other Features

- A pop-up calendar
- A record count function that can filter most fields for specialized sorting
- Set up customer alias to facilitate grouping of related customer records
- Maintain customer email and web addresses.

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