



AccountMate Software That Fits

Your customers are your business. Providing superior service to them is one of the ways your company can succeed in a highly competitive marketplace. Having the complete picture of your customer at your fingertips is essential in providing the service they need and demand.

INFOtrac for AccountMate provides you with a real time, customizable Customer Relationship Management (CRM) solution. Not only can INFOtrac for AccountMate manage every interaction entered for a prospect, client, supplier, contact or branch office, it can also be used for sales force and business process automation. And since it is customizable, it fits the way your company does business.

Best of all, it integrates seamlessly with AccountMate SQL, Express or MSDE software to provide a complete business management solution.

AccountMate 7 for SQL or Express Customer Relationship Management

INFOtrac for AccountMate manages and reports on every interaction entered for a prospect, client, supplier, contact or branch office. It will even schedule the next appropriate interaction—enabling exceptional account management and customer service. With just a glance, you can view all the past interactions with each contact providing the ability to track activity, issues and interactions with all your clients. It will even manage your meetings, phone calls, e-mails and daily tasks.

Contact information is easily searchable and manageable so you can access required records quickly in order to generate reports, mail merges or other customer service/management related activities. INFOtrac for AccountMate works with programs such as Microsoft Office so data can be merged and utilized in other programs to create custom mailings, mass e-mails, reports or other necessary business documents.

INFOtrac for AccountMate also provides for superior customization. Fields and screens can be customized to the way your business work flows. Contacts can also be grouped and segregated into different categories, creating a flexible reporting system. Contact lists for mass e-mails can be created “on-the-fly” to insure quick and easy communication between you and your customers.

Forecast	Cycle steps	Results	Product Code
1:	<input checked="" type="checkbox"/> Lead Qualified	6/27/2006	5
2:	<input checked="" type="checkbox"/> Initial Meeting	6/27/2006	10
3:	<input checked="" type="checkbox"/> Identify Dec Proc/Buyer	6/27/2006	5
4:	<input checked="" type="checkbox"/> ID Competition	6/27/2006	5
5:	<input checked="" type="checkbox"/> Needs Analysis	6/27/2006	10
6:	<input checked="" type="checkbox"/> Presentation	6/27/2006	10
7:	<input checked="" type="checkbox"/> Proposal Snt to Dec Maker	7/14/2006	5
8:	<input checked="" type="checkbox"/> Follow Up Proposal	7/14/2006	10
9:	<input checked="" type="checkbox"/> Verbal Approval	7/20/2006	20
10:	<input checked="" type="checkbox"/> Signed Contract	7/20/2006	10
11:	<input type="checkbox"/> Deposit Received	__/__/	0
12:	<input type="checkbox"/> PO Issued	__/__/	0

Probability of close: 90%

Entered by:
BILL
27-Jun-2006

Changed by:
BILL
20-Jul-2006

Sales Cycle Steps

INFOtrac for AccountMate provides these CRM functions:

- Quick access to current information on clients and contacts creates a knowledgeable workforce
- Immediate access to your clients' complete history provides exceptional customer service and client retention
- Easy management of past, current and future interactions with your clients, employees and suppliers
- Automatic management of your meetings, phone calls, e-mails and tasks saves time and money
- Perceptive reporting and analysis of pertinent, real time information provides insight into business operations, and identifies growth opportunities
- Centralization of contacts, calendars and information keeps information consistent and up-to-date

- Ability to share all pertinent real-time information helps to improve customer relationships
- Calendaring and personal productivity tools to insure everyone is on the same schedule

Sales Force Automation

Using INFOtrac for AccountMate provides you with the ability to track, forecast and manage your company's sales activity and increase your company's productivity.

INFOtrac for AccountMate automates every step in the sales cycle and aids in the generation of new business—from lead generation and marketing management, to communication tools and the scheduling of appointments. Once opportunities have been recognized, INFOtrac for AccountMate enables team collaboration, the creation of quotes and opportunity forecasting.

You can create instantaneous reports on current sales activity and productivity to determine the strengths and weaknesses of your sales and marketing efforts. You can track leads from marketing efforts, determine which products are moving better than others and create customized and detailed reports of all these activities. Customers can be informed automatically about special promotions utilizing their favorite means of contact, through either the Internet, e-mail, telephone, mail or personal contact.

INFOtrac for AccountMate also provides synchronization with an outside sales force so your salespeople always have current product, pricing and customer information.

Integrated Quotation Module

INFOtrac for AccountMate offers an additional option Quotation Module that increases productivity of your sales force and your order entry staff. It ensures that quotations are accurate and up-to-date.

The Quotation Module takes inventory pricing and descriptions from the data in the accounting inventory file ensuring that this information is exactly the same as the information normally accessed in the Sales Order module.

Users of INFOtrac for AccountMate's Quotation Module generate quotes for clients, which are available for your order entry staff to convert to sales orders once the order is confirmed. This information does not need to be retyped or converted from an external format. The normal order process is continued seamlessly from the quotation through sales orders to invoicing.

This is the first quotation module which is completely integrated with the CRM system and the accounting system.

INFOtrac for AccountMate provides:

- Complete Sales Forecasting
- Sales Force Productivity Tools
- Lead Management
- Productivity & Profitability Analysis
- Marketing Campaign Management
- Telemarketing Follow Up Tools
- Win / Loss Sales Analysis
- Crystal-based Reports
- Price quotes

Superior Customization

INFOtrac for AccountMate is designed to be customizable so it follows your own business processes. Different departments and users have different needs. Utilizing the standard "Screen Designer" feature, an individual user can create information screens that are unique to their needs. The ability to design screens around their working needs provides a more innate workflow process, which provides workers the ability to get their work done more quickly and efficiently—boosting productivity.

Your Office is Worldwide INFOtrac for AccountMate provides the ability for an outside sales force, a branch office or workers on a business trip to stay in touch and share information with other users and the head office.

AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com

Software That Fits