AccountMate's Contact Manager (CM) module is a full-featured contact management program that helps you manage your business cycle more effectively and efficiently. It fully optimizes Microsoft Office to provide a complete and automated contact management system that offers an all-in-one solution for managing multiple contacts.

CM stores all vital business and financial data about contacts and customers including names, addresses, phone numbers, e-mail addresses and websites as well as notes and contact history. It allows you to sort and categorize contacts. It integrates with Microsoft Word; provides contact filters, mail merge, e-mail and reporting functions; and performs mass search and replacement of contact and customer data.

This module is fully integrated with AccountMate's Sales Order (SO) and Accounts Receivable (AR) modules to avoid duplicate data entry and provide up-to-date customer information at the touch of a button.

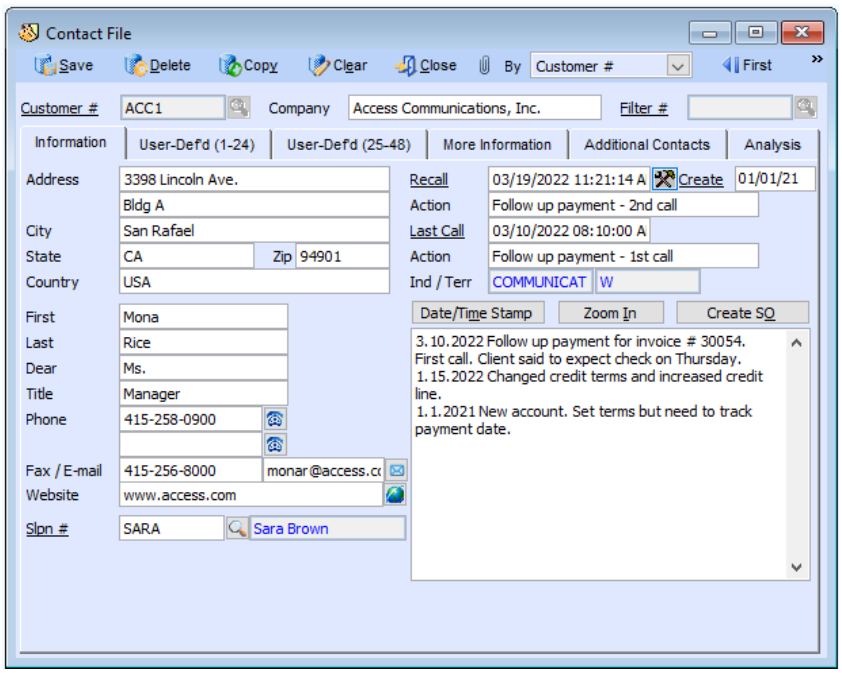
AccountMate 12 for LAN
Contact Manager Module

Enhanced Contact Management

Users can quickly contact a customer or prospect, enter and review the salient points of each contact, track communications in the order in which they occurred and perform mass mailing and/or e-mail distribution to customers and prospects. Integrated e-mail capabilities that utilize any of the popular Microsoft mail systems (i.e. Microsoft Exchange or Microsoft Office) support direct communication with contacts and customers.

Complete Contact Record Information

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



Contact File - Information Tab

User-Defined Fields

Up to 48 user-defined fields can be added to contact records. Users can define each field name, type (character, date, logic or numeric), width and number of decimal places. They can also add the Lookup feature to each character-type field.

Attach Files to Records

Users can attach files (e.g. documents, spreadsheets, PDFs, etc.) to the contact and customer records. These attachments can serve as supporting documents or references that can be retrieved, updated or purged at the user's convenience. Files attached to customer records are accessible not only in the CM module but also in the SO and AR modules.

Easy-to-Use Contact Management Database

Users can search and retrieve contact records by company name, contact name, zip code, telephone number, recall date, and salesperson number. You may also use any of a wide variety of other search filters. They can fine tune the search by setting up filters using data fields that are standard with AccountMate or the user-defined fields. They can also 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

AccountMate seamlessly integrates with Microsoft Word for easy mail merge and correspondence. Users can retrieve documents and labels created in Microsoft Word to customize and print them from within Contact Manager.

Integration with Sales Order and Accounts Receivable Modules

When integrated with the Sales Order module, users can create a sales quote or an order directly from the contact screen and fax it “on the fly". From the contact screen, users have instant access to the customer’s accumulated-to-date (ATD) sales, SO backorder, open credit amount and balance due, and drill down to their respective details.

When integrated with the Accounts Receivable module, users can view invoice and payment transactions recorded using the AR module; and summarize, compare and graph monthly invoice transactions for any customer.

Other Features

When integrated with the Accounts Receivable module, users can view invoice and payment transactions recorded using

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

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