AccountMate

AccountMate's Customer Inventory Manager module lets you integrate your business more closely with your customers helping you achieve higher levels of customer satisfaction and better customer retention. Most customers find it easier to use their own inventory part numbers, descriptions and units-of- measurement when placing orders and when receiving and being billed for products and services. Using this module, you can easily cross-reference item numbers, descriptions and units-of-measurement to those of your customers. It even allows you to set customer contract prices. This module integrates seamlessly with AccountMate's Accounts Receivable and Sales Order modules.

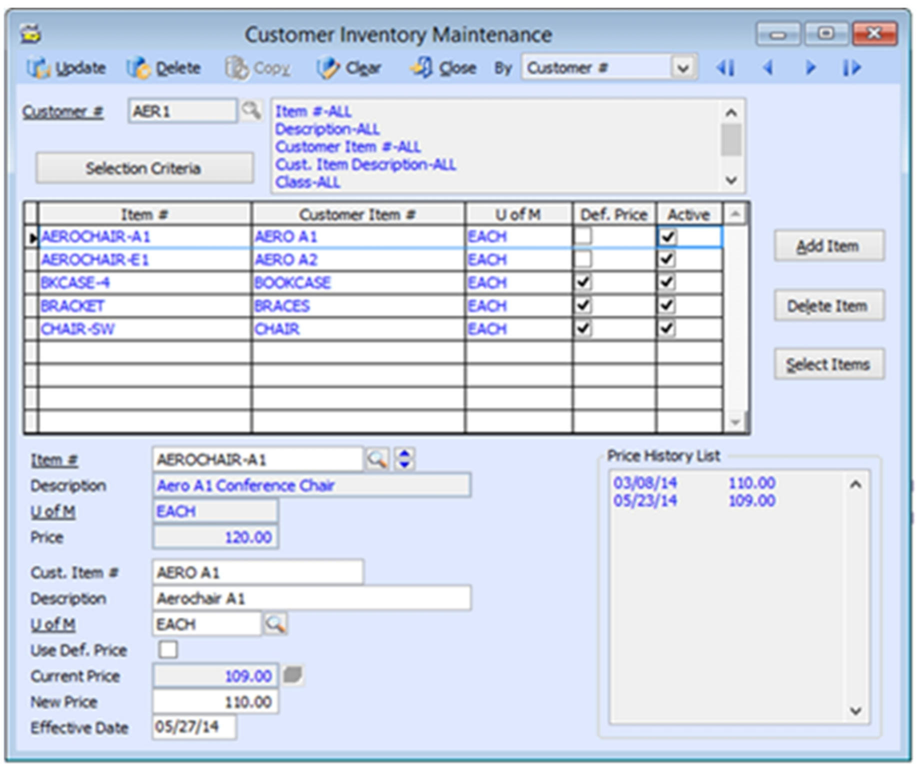
AccountMate 10 for SQL or Express
Customer Inventory Manager Module

Instant Access to Customer Inventory Information

You can make a list of inventory items frequently purchased by your customers. You can set the system to display this list when you look up items for the customer instead of the company's full inventory item list. This speeds up the ordering process and gives you an edge in delivering superior customer service.

Cross-Reference the Customer's Part Numbers to Your Own Item Numbers

You can keep a record of your customer's part numbers and cross-reference them to your own. You can use this information to locate the inventory items that match the customer part numbers that appear on the customer's purchase order.



Customer Inventory Maintenance

Customer-Specific Contract Prices

Each customer can be assigned a distinct contract price for each inventory item. You can set the system to use this price when selling the item to the customer in lieu of any other prices set up for that item.

Use Selection Criteria to Update Customer Inventory Records

You can filter the records that will appear in the Customer Inventory Maintenance screen by configuring a selection criteria. Records can be filtered by item number, description, customer item number, customer item description, item class, product line and inventory type. Only the records that meet the selection criteria will appear in the grid for you to update. This makes it easier to update the customer inventory records for a selected group of items and helps minimize data entry mistakes.

Automatically Update Prices

You can input new customer contract prices ahead of time and set the system to put them into effect on a predefined date. This helps ensure that your salespeople are using up-to-date prices when taking customer orders. Price updates can either be performed immediately or they can be set to run daily, weekly or monthly on a recurring schedule. The ability to schedule contract price updates is only available when using AccountMate with the SQL Server Standard or Enterprise Editions.

Pricing History

The Customer Inventory Manager module keeps a record of each customer’s contract pricing history which you can view on the screen or by generating a report. You can compare a customer's historical contract prices against the current contract price and other pricing schemes that apply to the same items. This can be very useful when setting future contract prices.

Show Customer Item Data on Transaction Documents

Customer item numbers, descriptions and units-of-measurement can be printed on sales orders and invoices to allow your customers to match the details on these documents with their own purchase orders and internal reports.

Customer Inventory Listing

You can view a list of customer inventory items, showing both their inventory numbers and yours, along with each customer’s contract pricing history and any future contract price updates that have
been scheduled.

Integration with Sales Order and Accounts Receivable Modules

Integration with the Sales Order and Accounts Receivable modules allows you to use a customer’s inventory numbers in transactions, from order entry to shipment and invoicing. It also allows you to use contract prices in customer orders and invoices.

Other Features

- Option to use customer item numbers to locate an inventory item record
- Special customer item number lookup lists the customer’s inventory numbers only

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