



AccountMate
SOFTWARE THAT FITS

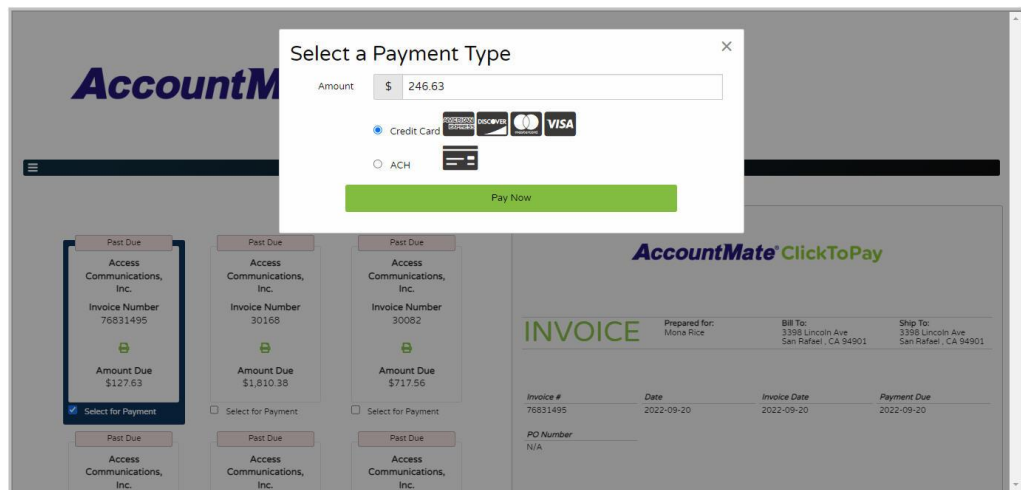
AccountMate's Upsell Management module provides tools you can use to help boost your sales. It allows you to maintain a list of accessories or upsell items that can be offered to customers who buy specific inventory items. You can view this list and select the upsell items when processing customer orders. You can also track upsell item sales for commission purposes. Even create a script or provide special instructions that your sales team can use as a guide when selling the upsell items.

The Upsell Management module integrates with AccountMate's Sales Order, Accounts Receivable, Inventory Control, and Inventory Specification modules to enhance your sales process.

AccountMate 14 for SQL or Express ClickToPay

Provide a Fast and Secure Way for Customers to Pay Online

With the ClickToPay feature, your customers now have a safe and convenient way to pay their invoices online. They can access the online payment portal by clicking the "Click here to pay online" link on the electronic invoices they receive. This takes them to a secure website where they can see a list of their outstanding invoices. They can select the specific invoices they want to pay and click a button. They will then be shown a screen where they can select their preferred payment option and enter their payment information. Customers never have to share their credit card/banking information with you, giving them peace of mind while giving you a quick and effortless way to get paid.



ClickToPay Online Payment Portal



Save Money with Level 3 Credit Card Processing

AccountMate's ClickToPay feature sends Level 3 data to credit card processors. Level 3 requires the most extensive data, which includes line-item details about the sales transaction that go beyond the minimum required for traditional credit card transactions. This type of credit card data leads to lower interchange rates and lower processing costs on Business-to-Business (B2B) and Business-to-Government (B2G) transactions. This results in a substantial reduction in credit card fees for ClickToPay users, which saves you money.

Set Up Pay Codes to Use in ClickToPay Transactions

Having the ClickToPay feature does not eliminate the option to process customer payments through traditional methods. Accordingly, users must configure pay codes for use with the ClickToPay transactions. These ClickToPay pay codes are used to generate electronic invoices that include a link to the payment portal. Customers can access the payment portal by clicking this link.

View and Pay Outstanding Invoices in One Secure Site

When an invoice assigned a ClickToPay pay code is created, its details are automatically uploaded to the payment portal. Customers can view all their outstanding ClickToPay invoices in the payment portal. They can choose one or multiple invoices to pay at any given time. Payments can be made via ACH or by credit/debit card. Visa, Mastercard, American Express, and Discover cards are all supported.

Perform Immediate or Scheduled Transaction Synchronization

Users can configure AccountMate to download payments made through the portal either immediately or according to a predefined schedule. During the download process, the software automatically synchronizes and updates the company's accounts receivable (AR) invoice balances and customer payments based on data entered through the payment portal. This eliminates the need to manually record customer payments made through the portal and reduces the risk of data entry errors.

Partnership with REPAY – a Trusted Name in Financial Technology and Payment Solutions

AccountMate has partnered with REPAY to provide our users with this service. Users must register each company separately with REPAY to use the ClickToPay feature. Upon registration, each company is provided with unique login credentials for uploading invoice details to and downloading payment details from the payment portal.

Seamlessly Integrates with AccountMate Sales Order and Accounts Receivable Modules

- Users can assign ClickToPay pay codes to sales quotes, sales orders, and AR invoices (i.e., regular, imported, and recurring AR invoices). They can also assign ClickToPay pay codes as the default for customer records.
- Provides the ability to copy the ClickToPay URL from the customer record and paste it into a web browser to directly access REPAY's ClickToPay portal.

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