



AccountMate Software That Fits

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

Contact Manager stores all vital business and financial data about contacts and customers including names, addresses, phone numbers and e-mail addresses as well as notes and contact history. It allows you to sort and categorize contacts. In addition, it integrates with Microsoft Word, includes an enhanced report designer, provides contact filters, mail merge, e-mail and report functions and offers automatic dialing and e-mail addressing features. You can perform mass search and replacement of contact and customer data.

When integrated with AccountMate's Sales Order module, you have a complete order-entry system that displays updated customer information at the touch of a button.

AccountMate 7 for LAN Contact Manager Module

Complete Contact Record Information

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

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 electronic mail capabilities that utilize any of the popular Microsoft mail systems, such as Microsoft Exchange or Microsoft Office, support direct e-mail communication with contacts and customers. The system also supports automatic modem-dialing so users can call customers and prospects directly from inside the AccountMate program.

Contact File

Save Delete Copy Clear Close By Customer # First

Customer # ACC1 Company Access Communications, Inc. Filter #

Information User-Def'd (1-24) User-Def'd (25-48) More Information Additional Contacts Analysis

Address 3398 Lincoln Ave. Bldg A
City San Rafael
State CA Zip 94901
Country USA

Recall 06/06/2008 02:58:24 PM Create 01/01/07
Action Follow up payment - 2nd call
Last Call 05/30/2008 02:57:25 PM
Action Follow up payment - 1st call
Ind / Terr COMMUNICAT W 00:02:30

First Mona
Last Rice
Dear Ms.
Title Manager
Phone 415-258-0900
Fax / E-mail 415-256-8000 monar@access.com
Website www.access.com
Slip # SARA Sara Brown

Date/Time Stamp Zoom In Create SQ
05/30/08 02:57 PM : Follow up payment for inv# 25346 - first call. Client says to expect the check by end of day today.

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, and add the Lookup feature to the field. This makes Contact Manager readily customizable.

Easy-to-use 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 other search filters. Further enhance sorting abilities by setting up user-defined filters using data fields that are standard with AccountMate or the user-defined fields users created. Use the Mass Search and Replace function to quickly update data in one or more fields for all customers who qualify under the defined search criteria.

Seamless Integration with Microsoft Word

The Contact Manager database 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”. Users can also drill down from the contact screen to gain instant access to sales order details or quickly examine critical financial information such as sales-to-date, SO backorder data, open credits or balances due without having to leave Contact Manager.

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

Other Features

- A pop-up calendar
- A record count function that can filter most fields for specialized sorting
- The ability to generate transactions analysis by customer or inventory item
- Set up customer alias to facilitate grouping of related customer records
- Maintain customer web address

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