



## AccountMate Software That Fits

AccountMate's Contact Manager module is a full-featured contact management program that helps professionals manage the total business cycle more effectively and efficiently.

The Contact Manager module fully optimizes Microsoft Office to provide a complete, automated contact management system that offers an all-in-one solution for managing multiple contacts.

This module is fully integrated with the accounting modules to avoid duplicate data entry and provide consistent data throughout the entire system.

## AccountMate 7 for SQL or Express Contact Manager Module

### Track Detailed Contact Activity

Use the Activity tab to enter and track more detailed information about customer contacts. This feature includes the ability to set up activity records to represent prospect sign-up, contract negotiation, customer complaints and all other types of cases that may arise from contacts with a customer or prospect. You can break down each activity into different stages (i.e. presales call, close sale, problem reporting or case resolution) to more accurately track the progress of these cases. Assign access rights to view or update these activity entries to the different users set up for the company.

Information	User-Def'd (1-24)	User-Def'd (25-48)	More Information	Additional Contacts	Analysis	Activity
Customer #	ACC1		Company	Access Communications, Inc.	Filter #	
Address	3398 Lincoln Ave Bldg. A		Recall	06/01/2007 08:48:11 A	Create	08/05/06
City	San Rafael		Action	Follow up payment - 2nd Call		
State	CA	Zip 94901	Last Call	05/31/2007 10:52:43 A		
Country	USA		Action	Follow up payment - 1st Call		
First	Mona		Ind / Terr	COMMUNICAT WEST		00 : 04 : 36
Last	Rice		Date/Time Stamp	Zoom In	Create SQ	
Dear				05/31/07 10:52 AM : Follow up payment for Inv# 25346. Client says to expect the check by today.		
Title	Manager			08/05/06 03:24 PM : New account. Set terms but need to track payment performance in the first year.		
Phone	415-258-0900					
Fax	415-256-8000					
E-mail	monar@access.com					
Website	www.access.com					
Slon #	SARA					

Contact File—Information Tab

### Enhanced Contact Management

You can quickly contact a customer or prospect, enter and review the salient points of each contact, track your communications in the order in which they occurred and perform mass mailing and/or e-mail distribution to customers and prospects. There are integrated electronic mail capabilities that utilize any of the popular Microsoft mail systems, such as Microsoft Exchange or Microsoft Office and support direct e-mail communication with contacts and customers. The system also supports automatic modem-dialing so you can call customers and prospects directly from inside the AccountMate program.

### 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.

## User-Defined Fields

Up to 48 user-defined fields can be added to contact records. Contact Manager is easily customizable by defining field names, type (character, date, logic or numeric), width and number of decimal places.

## 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 defining your own filters using data fields that come standard with AccountMate or the user-defined fields that have been 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. This allows for easy retrieval of 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, a sales quote or an order can be created directly from the contact screen and it can be faxed immediately. You are also able to 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, Sales Order backorder data, open credits or balances due without having to leave Contact Manager.

When integrated with the Accounts Receivable module, you can view invoice and payment transactions recorded through the Accounts Receivable module and 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
- Set up customer alias to facilitate grouping of related customer records
- Maintain customer e-mail and web addresses

### **AccountMate Software Corporation**

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA  
800-877-8896 | 707-774-7500 | [www.accountmate.com](http://www.accountmate.com)

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