



**AccountMate**  
SOFTWARE THAT FITS®

## Customer Relationship Management

Your customers are your business. Providing superior service to them is one of the ways your company can succeed in a highly competitive marketplace. Having the complete picture of your customer at your fingertips is essential in providing the service they need and demand. Being able to view when the last order was placed, support issues and supplier problems, - quickly and easily - gives your business an edge on your competitors.

INFOtrac for AccountMate can provide this invaluable customer service edge.

INFOtrac for AccountMate provides you with a real time, customizable Customer Relationship Management (CRM) solution. Not only can INFOtrac for AccountMate manage every interaction entered for a prospect, client, supplier, contact or branch office, it can also be used for sales force and business process automation. And since it is customizable, it fits the way your company does business.

*Best of all, it integrates seamlessly with AccountMate SQL or MSDE software to provide a complete business management solution.*

# INFOtrac for AccountMate®

## Customer Relationship Management

INFOtrac for AccountMate manages and reports on every interaction entered for a prospect, client, supplier, contact or branch office. It will even schedule the next appropriate interaction - enabling exceptional account management and customer service. With just a glance, you can view all the past interactions with each contact providing the ability to track activity, issues and interactions with all your clients. It will even manage your meetings, phone calls, e-mails and daily tasks.

Contact information is easily searchable and manageable so you can access required records quickly in order to generate reports, mail merges or other customer service/management related activities. INFOtrac for AccountMate works with programs like Microsoft Office so data can be merged and utilized in other programs to create custom mailings, mass e-mails, reports or other necessary business documents.

INFOtrac for AccountMate also provides for superior customization. Fields and screens can be customized to the way your business work flows. Contacts can also be grouped and segregated into different categories, creating a flexible reporting system. Contact lists for mass e-mails can be created "on-the-fly" to insure quick and easy communication between you and your customers.

INFOtrac for AccountMate provides these CRM functions:

- Quick access to current information on clients and contacts creates a knowledgeable workforce
- Immediate access to your clients' complete informational history provides exceptional customer service and retention
- Easy management of past, current and future interactions with your clients, employees and suppliers
- Automatic management of your meetings, phone calls, e-mails and tasks saves time and money
- Perceptive reporting and analysis of pertinent, real time information provides insight into business operations, and identifies growth opportunities
- Centralization of contacts, calendars and information keeps information consistent and up-to-date
- Ability to share all pertinent real-time information helps to improve customer relationships
- Calendaring and personal productivity tools to insure everyone is on the same schedule

### Sales Force Automation

Using INFOtrac for AccountMate provides you with the ability to track, forecast and manage your company's sales activity and increase your company's productivity.

INFOtrac for AccountMate automates every step in the sales cycle and aids in the generation of new business- from lead generation and marketing management, to communication tools and the scheduling of appointments. Once opportunities have been recognized, INFOtrac for AccountMate enables team collaboration, the creation of quotes and opportunity forecasting.

You can create instantaneous reports on current sales activity and productivity to determine the strengths and weaknesses of your sales and marketing efforts. You can track leads from marketing efforts, determine which products are moving better than others and create customized and detailed reports of all these activities. Customers can be informed automatically about special promotions utilizing their favorite means of contact, through either the Internet, e-mail, telephone, mail or personal contact.

INFOtrac for AccountMate also provides synchronization with an outside sales force so your salespeople always have current product, pricing and customer information.

INFOtrac for AccountMate provides:

- Complete Sales Forecasting
- Quotes
- Sales Force Productivity Tools
- Lead Management
- Productivity & Profitability Analysis
- Marketing Campaign Management
- Telemarketing Follow Up Tools
- Win / Loss Sales Analysis
- Crystal-based Reports

### Superior Customization

INFOtrac for AccountMate is designed to be customizable so it follows your own business processes. Different departments and users have different needs. Utilizing the standard "Screen Designer" feature, an individual user can create information screens that are unique to their needs. The ability to design screens around their working needs provides a more innate workflow process, which provides workers the ability to get their work done more quickly and efficiently - boosting productivity.

### Your Office is Worldwide

INFOtrac for AccountMate provides the ability for an outside sales force, a branch office or workers on a business trip to stay in touch and share information with other users and the head office.



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