

AccountMate 6.5 Customer Inventory Manager Module

With AccountMate's 6.5 Customer Inventory Manager you can integrate your business more closely with your customer's business, resulting in higher customer satisfaction. With AccountMate Customer Inventory Manager, you can easily cross-reference inventory item numbers, descriptions and units-of-measurement with your customers', as well as automatically updating prices. The Customer Inventory Manager integrates seamlessly with the AccountMate's Accounts Receivable and Sales Order modules.

Customer Inventory Manager Module

Instant Access to Customer Information

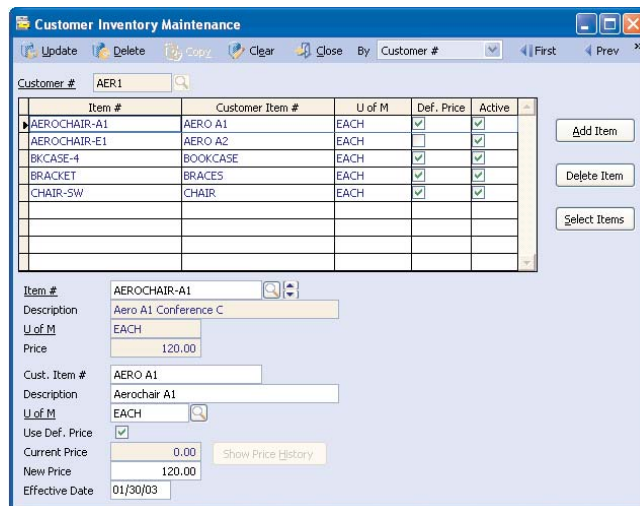
You have easy access to all inventory items that are cross-referenced with those of a particular customer. Listing your own and your customer's inventory numbers, inventory descriptions and units of measurement provides your company with an important edge in delivering superior customer service.

Cross-Reference a Range of Items

You can select and cross-reference items individually; or you may select a range of items to add to a customer's inventory record.

Pricing History

The Customer Inventory Manager module includes the ability to review pricing history. You can compare a customer's historical pricing with the current price and any future pricing plan. This is a useful tool when establishing new pricing policies with customers.



The screenshot shows the 'Customer Inventory Maintenance' window. At the top, there are menu options: Update, Delete, Copy, Clear, Close, and a dropdown for 'By Customer #'. Below this is a search bar for 'Customer #' with the value 'AER1'. The main area contains a table with columns: Item #, Customer Item #, U of M, Def. Price, and Active. The table lists several items like AEROCHAIR-A1, AEROCHAIR-E1, BKCASE-4, BRACKET, and CHAIR-SW. To the right of the table are buttons for 'Add Item', 'Delete Item', and 'Select Items'. Below the table, there are input fields for 'Item #', 'Description', 'U of M', 'Price', 'Cust. Item #', 'Description', 'U of M', 'Use Def. Price', 'Current Price', 'New Price', and 'Effective Date'. A 'Show Price History' button is also present.

Item #	Customer Item #	U of M	Def. Price	Active
AEROCHAIR-A1	AERO A1	EACH	✓	✓
AEROCHAIR-E1	AERO A2	EACH	✓	✓
BKCASE-4	BOOKCASE	EACH	✓	✓
BRACKET	BRACES	EACH	✓	✓
CHAIR-SW	CHAIR	EACH	✓	✓

Customer Inventory Maintenance Function

Customer-Specific Prices

Each customer can be assigned specific pricing for each inventory item that is so defined within the Customer Inventory Manager module.

Automatically Update Prices

You can automatically change prices for a specific customer on a predefined date. This ensures that you are providing the correct price when that customer places an order. Price updates can either be effective immediately, or they can be set to be updated daily, weekly or monthly; on a recurring schedule.

Customer Inventory Flagged On Transactions

When there is a customer with a Customer Inventory record, the "Item #" heading on transactions screens changes to "Customer Item #", providing a reminder to enter the customer's inventory item number.

The screenshot shows the 'Create Sales Order' window with the following data in the table:

Seq	Customer Item #	Description	Order Qty	Kit...	Unit Price	Disc %
10	AERO A1	Aerochair A1	25		140.00	5.00
20	AERO A2	Aerochair E2	5		500.00	3.00

Below the table, there are buttons for 'Add', 'Insert', 'Delete', and 'Detail...'. A summary section shows:

Item #	AEROCHAIR-A1	Warehouse	MAIN	Currency	USD
Description	Aero A1 Conference Chair	In-process	0	Subtotal	6,000.00
Specification	Beige	In-transit	0	Discount	250.00
Class / Prod Ln	CHAIR AERO	On-order	15	Freight	0.00
U of M / Weight	EACH 0.00	On-hand	66	Sales Tax	488.75
Unit Price	120.00	Booked	42	Adjustment	0.00
Special Price	/ / / /	Available	24	Total	6,238.75

Create Sales Order Function

Special Customer Item Number Lookup

The Lookup feature provides you with the ability to select from only the customer's inventory numbers.

Display Customer Item Data on Transaction Records

Customer item numbers, descriptions and units of measurement can be displayed on sales orders and invoices.

Customer Inventory Listing

You can view a customer's history, showing both their inventory numbers and yours, along with pricing history and any future pricing scheduled. You have the flexibility to use the customer's inventory numbers or your own, depending on what the customer desires.



AccountMate - Software That Fits

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