



Software That Fits

Client

FACE—Resources,
Training & Action on
Alcohol Issues
Clare, Michigan

Type of Business

National Non-Profit Organization

Number of Locations: 1

Number of Employees: 8

**AccountMate Users
on System:** 8

AccountMate Modules:

- Accounts Payable
- Accounts Receivable
- Bank Reconciliation
- Customer Relationship Manager (CRM)
- General Ledger
- Kitting
- Purchase Order
- Sales Order
- System Manager

3rd Party Applications in Operation:

- F9 Report Writer

Non-Profit Able to 'Deliver the Message' to More Customers

Operating since 1989, FACE Resources, Training & Action on Alcohol Issues is a national non-profit organization that supports sensible alcohol policies and practices through the development of messages, collateral, strategies and trainings designed to create public awareness and action on alcohol issues.

FACE had successfully been using the AccountMate LAN accounting system since 2003. They had been leveraging the flexibility of AccountMate and the expertise of their AccountMate reseller, Technical Edge, to make several changes to their technology system since their establishment.

While satisfied with their AccountMate accounting product there was an obvious business need for the additional Customer Relationship Management (CRM) functionality.

The Challenge

FACE was looking for a full-featured CRM package that would integrate with their accounting software. Specifically, they needed to keep track of prospects and do in-depth analysis of their current customers' history of purchases. They were not keen on switching from their AccountMate LAN product but recognized that they were in a position of needing of an integrated CRM option.

The Solution

In October 2005 on the advice of their local consultant Technical Edge, FACE upgraded their current AccountMate LAN product to AccountMate SQL and installed the integrated INFOtrac Customer Relationship module.

FACE employees were already accustomed to the LAN version of AccountMate. With this familiarity, there was relatively little re-training required during the SQL upgrade process.

The Results

Tight Integration of INFOtrac CRM with the AccountMate SQL accounting system and the skillful modifications made by Technical Edge allowed FACE to gain substantially better control of their customer information system. Access to this information provided the greatest level of service to their nation-wide customers and a means to promote and deliver the best product options. Several custom reports in INFOtrac for AccountMate provide detailed analysis of sales history for customer purchases. FACE is currently using these reports to promote/market new products to customers who might not be familiar with their entire product line.

FACE currently tracks over 3000 customers and prospects. Mass mailings set up through INFOtrac enable FACE to send out flyers to customers who have purchased a specific product line in the past.

Through this CRM integration, FACE can now link their customers from particular states or organizations together with one another. This equates to a better way for FACE to market products more effectively.

FACE is now in a better position to manage their customer database information, routinely champion the products they have available, and track inventory to maximize their employees' efficiency and increase customer satisfaction.

About the Customer

Since 1989, FACE has expanded its reach to become a national non-profit organization that promotes sensible alcohol policies and practices. They conduct work in three areas:

1. Provide research-based public information resources that include films, television and radio public service announcements, billboards, theater ads, PowerPoint presentations and a variety of print products (posters, brochures, bookmarks, camera-ready art).
2. Provide face-to-face and online training. The training is designed to identify contributing factors related to alcohol problems and then determine actions to reduce those problems.
3. FACE works with collaborating partners at the local, state and national level to reduce alcohol problems. They document examples of community actions that result in positive change and make these stories available to others.

More information is available on FACE at www.faceproject.org

About Technical Edge, Inc.

Technical Edge, Inc. has been growing successfully in the Michigan area since 1985. Technical Edge specializes in networking, computer consulting, analysis, programming, training, and support. Their team of employees has extensive experience in the computer industry. In October 2005, Technical Edge was awarded the distinctive AccountMate Elite Business Partner status.

Technical Edge also uses AccountMate and INFOtrac CRM to run their office. For them, one of the biggest advantages of implementing INFOtrac has been the shared calendar. Per Jenean Kleinedler, President, "For the 20 years we've been in business, we've had a wipe-off schedule board on a wall in our office. As of early August, we took the wipe-off board down and are using the shared calendar options for scheduling ourselves." They also value having all documents (i.e. Word, Excel, .pdf) related to a customer linked together in one program so there is no more searching to find documents and then the documents can be opened with one keystroke.

About AccountMate

Founded in 1984, AccountMate develops and markets fully modifiable business accounting software. Systems range from single user versions to those that support hundreds of users simultaneously. AccountMate software is distributed exclusively through a worldwide channel of Authorized Solution Providers. AccountMate can be reached at (800) 877-8896 or at www.accountmate.com

AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com

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