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AccountMate®

Growing Medical Supplier Identifies Best Sales Leads By Using AccountMate CRM

PETALUMA, CA (August 20, 2008) —

Since 1980, Davis Medical Electronics, Inc. has distributed new and refurbished medical equipment, supplies and service throughout the United States. With two locations, the company runs a lean, successful, customer oriented operation.

Their success is built on four founding principles: attention to details, distributing quality products, establishing long-term customer relationships and understanding how to make medical practices profitable. "We give our customers a level of service and support that they can't find with any other medical equipment suppliers," says Brian Hibbits, IT Director at Davis Medical.

Although they had used AccountMate Software to run their core business unit for the last two decades, the company had tracked their sales leads and customer follow-ups in Excel. Naturally, this process was labor intensive and difficult to manage as more sales representatives joined the company. In 2006, Davis Medical strategically developed their internet business and outgrew their current client management system. "We quickly realized that an enhanced client and lead tracking solution was needed to manage existing customers and post-sales marketing," says Hibbits.

Davis Medical specifically was looking for a Customer Relationship Management (CRM) solution that would manage company workflow, track and assign new leads, and automate the business process on customer follow-up. Capturing, qualifying and marketing to new prospects was essential to their business. At the same time, the company needed to upgrade their accounting system and wanted a financial business solution that

would integrate their lead management requirements.

To accommodate their growing business, Davis Medical upgraded their accounting system to AccountMate for SQL, which provides the essential business backbone they were looking for. INFOtrac for AccountMate, AccountMate's CRM solution, provided a complete business solution by seamlessly integrating lead management processes and financial accounting functions.

Prior to the INFOtrac installation, Davis Medical maintained customer information in three separate places. One database managed the service department, one database supported accounting functions and another database handled new prospects. Managing these sets of customer information was time consuming and inefficient. Using INFOtrac for AccountMate, Davis Medical was able to consolidate three separate sets of data into one. Now, they have a real time CRM solution with every interaction entered for their prospects, customers and contacts in one centralized place.

With one view, employees now have quick access to current and historical client information and "can support customers more effectively," adds Hibbits. Employees have immediate access to their clients' complete history for service, accounting and sales information cross-functionally. By sharing all pertinent real-time information, INFOtrac for AccountMate helps Davis Medical to standardize their internal sales and service process, simplify company-wide communications and provide exceptional customer service.

Using INFOtrac for AccountMate, Davis Medical has the ability to track, forecast and manage their company's sales activity. Every sales opportunity is captured and funneled directly to the sales representative. By automating sales forecasting, the company can track leads from all marketing efforts, determine the probability of which leads will convert to sales and establish the correct inventory requirements. INFOtrac for AccountMate is synched up with outside sales, so the salespeople in multiple locations have current product, pricing and customer information.

By integrating INFOtrac for AccountMate, Davis Medical Electronics, Inc. has reached their goal of increasing the level of customer service and support. By centralizing all real-time, pertinent customer information, any employee can support the customer in the same manner to which they were accustomed. So now, problems associated with company growth are seamless to the customer. "INFOtrac for AccountMate is an excellent tool for managing sales leads and it's something that will be able to scale with our company as we continue to grow," says Hibbits.

About AccountMate Software Corporation

Founded in 1984, AccountMate develops and markets fully modifiable business accounting software. Systems range from single user versions to those that support over 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.

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