

Taking Full Advantage of Accounting Software

By Jeff Stimpson

Users of mid-market accounting software frequently underutilize their apps. Here are some tricks and tips straight from the vendors.

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Even among those seasoned in using well-established apps it's estimated that typical users are utilizing only some 10 percent of their productivity tools, including their accounting software. The trick for vendors is to make their apps more complex, yet easier to use, confirms Scott Hays, Epicor senior manager, product marketing. "We find that misconceptions users have about what an enterprise solution can do for them presents an educational opportunity," Hays adds, "enabling us to open their eyes to the rich functionality the suite provides." Nonetheless, users both make mistakes and neglect to use apps to their fullest applicable potential.

Accountmate Software Corporation **accountmate.com**

Two underutilized modules are the Customer Inventory Manager and the Upsell modules. With the former, users sometimes don't realize that this module exists, so they lose out on being able to integrate their business more closely with their

customers' business. Upsell has only been out a few months, and word is just starting to get to users. This module allows a customer service employee to suggest available products that can be offered at the time of a phone call.

Regarding common mistakes, the company says sometimes customers don't realize that in addition to using their Revenue Codes to assign the expense account, they can actually use it in other ways: a company can link what they are doing in sales to track revenue centers and be able to present their income statement information by various levels; and in some instances, Revenue Codes can be linked

to a company's revenue process so that in the end a company can see who their customers are and sort them by revenue account and revenue code. Every week AccountMate also publishes AccountMate BP TechNews with "Tips of the Week" for resellers.

For enhancements, AccountMate for SQL added an integrated quotation module to its CRM module, and to the suite of the company's products was added an Upsell management module.

