



AccountMate 6.0

Contact Manger

AccountMate 6.0's Contact Manager is a full-featured contact management software program that helps professionals manage the total business cycle more productively and efficiently. Contact Manager fully optimizes Microsoft BackOffice to provide a complete, automated contact management system that offers an all-in-one solution for managing multiple contacts.

Contact Manager stores all vital business and financial data about contacts and customers (including names, addresses, phone numbers and e-mail addresses), along with notes and contact history; sorts and categorizes contacts; integrates with Microsoft Word; includes an enhanced report designer; provides contact filters, mail merge, e-mail and report functions; offers automatic dialing and e-mail addressing features; and performs mass search and replacement of contact and customer data. When Contact Manager is integrated with AccountMate's Sales Order module, you have a complete order-entry system that provides current customer information at the touch of a button.

ACCOUNTMATE 6.0 CONTACT MANAGER FEATURES

Complete Contact Record Information

Each contact record includes date/time stamped contact notes, plus the contact name, title, company, address, fax and phone numbers, e-mail address, last and next call date, last and next action, industry and territory.

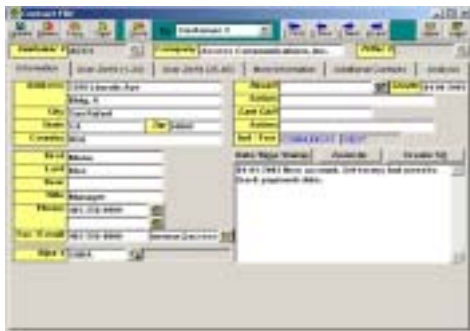


Figure 1. Contact File

Enhanced Contact Management

Contact records allow you to quickly contact a customer or prospective customer, enter and review the salient points of each contact with a customer or prospect, track your communications with the customer in the order in which they occurred, and perform mass mailings and e-mail distributions to customers and prospects.

48 User-Defined Fields

Up to 48 user-defined fields can be added to contact records. You can define each field's name, type (character, date, logic or numeric), width and decimal places, and add the Lookup feature to the field. This makes Contact Manager extremely customizable.

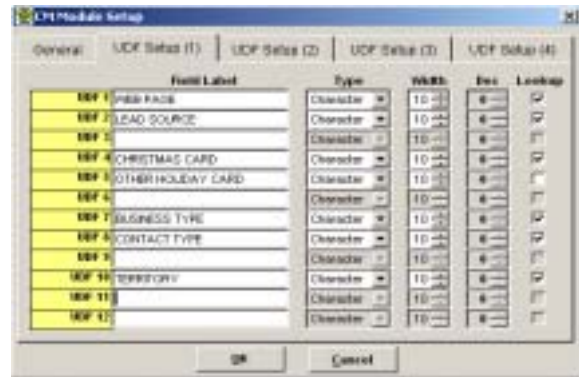


Figure 2. Contact Manager Module Setup

Easy-to-use Contact Management Database

Search and retrieve contact records by company name, contact name, zip code, telephone number, recall date, salesperson number or by using any of a wide variety of other search filters.

Seamless Integration with Word

The Contact Manager database is completely integrated with Microsoft Word for easy mail merge and correspondence.

Analyze Customer's Monthly Invoice Transactions

When Contact Manager is linked to AccountMate's Accounts Receivable through the Sales Order module, you can list invoice and payment transactions entered through the AR module, as well as summarize, compare and graph monthly invoice transactions for any customer.

Complete Order Entry System

When integrated with AccountMate's Sales Order module, you can create a sales quote or order directly from the contact screen and fax it "on the fly." In addition, you can drill down from the contact screen into sub-levels of detail to gain instant access to actual sales orders, or you can use the tab key to quickly examine critical financial information such as sales-to-date, open-order data, or balances due, all without having to leave Contact Manager.



Figure 3. Contact File

Other Features

- A pop-up calendar
- A record count function that can filter most fields for specialized sorting
- Integrated electronic mail that utilizes any of the popular Microsoft mail systems, such as Microsoft Exchange or Microsoft PostOffice, for direct e-mail communication with contacts and customers
- Automatic modem-dialing to call customers and prospective customers
- The ability to generate transactions analysis by customer or inventory item
- The ability to enter chronological notes about each contact activity
- On-screen display of the date and time of your last contact with a customer or prospect, as well as the scheduled time of a follow-up call or other action items
- The ability to call up documents and labels created in Microsoft Word, and to customize and print them from within Contact Manager
- An express button that brings up the Create Sales Order screen
- A Mass Search and Replace function that enables you to replace the contents of one or more fields for all customers who match selected search criteria