

## Customer relationship management with ACCTivate!



ACCTivate! is more than  
a simple CRM system  
- it's a full relationship  
management system

Find customer  
information quickly

Record & track various  
customer issues

Track customer orders

Store multiple  
ship-to addresses  
& contacts

ACCTivate! provides powerful tools to enter, organize and retrieve customer information.

Not only does ACCTivate! provide the ability to quickly lookup a customer when they call, but also allows all the information about that customer to be easily accessed at any time.

This means that you can talk to your customer confidently knowing that you have all the facts without having to promise to "research it and call back."

Moreover, you can instantly lookup their last order, see the last products purchased, examine open invoices, track orders, review credit history, view all previous conversations and commitments, comment on product availability, track shipment progress and more.

### What is it?

ACCTivate! stores basic information for each customer, such as company name, address, emails, notes, phone and fax. ACCTivate! also gives you a substantially deeper amount of information than just that.

### Customer information

- > Store multiple ship-to addresses for each customer
- > Instantly check credit status - live
- > Find customers in the system by customer ID, company name, contact name, phone, address, city, state, zip code, sales person and more than 30 ways total
- > Quickly see the history of sales orders, invoices, RMAs and credit memos for each customer, along with a history of purchased products
- > Store an unlimited number of contacts for each customer. Each contact has their own phone, fax, email, and other numbers

### Business activity tracking

- > Use the Business Activity Management feature to give your CRM a boost to be a full relationship management system
- > Track sales leads and contacts
- > Record customer service calls

- > Review RMAs
- > Record and deliver quotes
- > Track lost business and more

### ACCTivate! note fields

- > ACCTivate! stores and tracks information through a wide variety of notes
- > Use pop-up notes that are displayed when the customer is selected in a sales order
- > Store a permanent note that will stick with the customer for good
- > Enter dated notes of any length that can be assigned for follow-up by any ACCTivate! user
- > Record special shipping or other instructions for each customer ship-to address

### CRM in ACCTivate!

You worked hard to earn your customer's business. With the built-in CRM features in ACCTivate! you not only can have peace-of-mind that your customers are secure in your system, but you also know that you have their information at your fingertips whenever you need it.