



Customer Accounts Management

Overview

Managing customer accounts is crucial to your business. We feel it is important for you not to miss out on any customer activity. We've provided the options to assist you with not only successfully running your receivables department, but also assist you in storing important information. The extensive profile is extremely beneficial for your marketing efforts and includes valuable contact information and an extensive note option.

Features

- Extensive account profiling
- Customer notes and categories
- Map integration for profile address
- Account notes and categories
- Reprint all customer sales invoices
- Unlimited purchase history
- Unlimited contact information
- Receivables management
- Generate finance charges
- Search for a customer by account number, name, phone number and location
- View or add customer owned equipment with the integrated solution
- Include invoice with statement
- Email or print statements in one easy step
- Statement Manager provides complete management of your statements including email and the capability to resend statements to your customers
- Marketing Manager provides you ease of communication with your prospects and customers to grow your business. Easily create templates for various marketing efforts
- Auditing
- Customized statements
- Customer purchase report
- Easily receive customer payments
- Display a breakout of customer balances
- Multiple ship-to addresses
- Past Due Balance Report (30, 60, 90 Day)
- Multiple contact information for each account
- Maintain ship to information
- Multiple custom retail pricing per customer available
- Year-To-Date sales totals
- Open item by individual customer