



## AccountMate Software That Fits

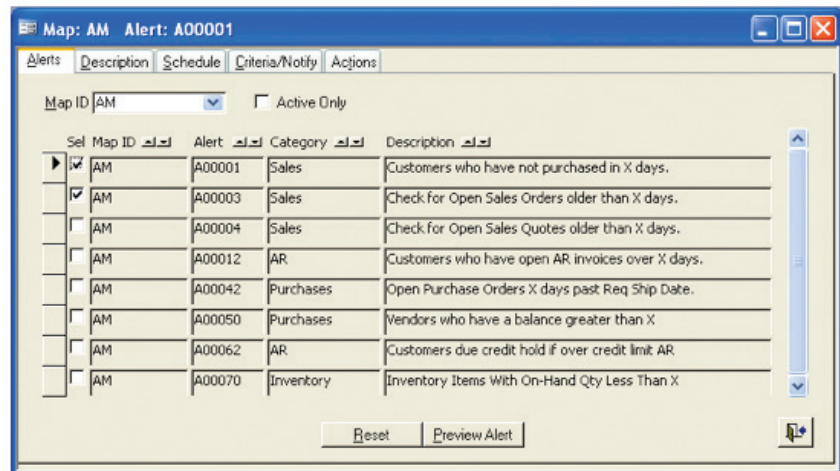
AccountMate is real-time, customizable financial and business management software designed to address the needs of small to medium-sized businesses. It takes advantage of the speed of client/server technology and the latest productivity-enhancing tools in Microsoft's suite of products to help you better manage your business.

This leading-edge application combines the full functionality of our award-winning AccountMate system with the power of Microsoft's SQL Server. It offers AccountMate users enhanced investment protection for the long haul with superior scalability, up-time performance, stronger data security and easier integration with other software applications.

## Info-Alert for AccountMate Data Monitoring, Alerts and Actions

### Automated functions keeping an eye on important business data

- Automatically identify issues before they become problems
- Catch data entry errors while there is still time to correct them
- Find exceptions in your data that you should know about
- Automatically send dunning messages, invoices or statements
- Update CRM systems or other databases with alert information
- Increase productivity without working harder



Set various notification options, output to fax, email or report.

Quickly put Info-Alert to work by selecting from pre-defined alerts and actions.

Simply set criteria and schedule events to run as needed.

### Alerts

Info-Alert scans your data looking for conditions or criteria you have asked it to look for like purchases that have not been received, orders with a low gross margin, an important item needs to be reordered, etc. Once identified, you and anyone else that needs to be aware of this condition will be alerted by email, fax or printed report.

### Actions

Info-Alert can automatically send dunning messages, order acknowledgements, invoices and other customer related messages that you configure. It can also request status of late shipments from your vendors, requests for product quotes and other actions you require.

### Events

Events can be configured to create and send files as email attachments, update customer credit hold flags, move suspect orders to another batch, update CRM data, and other unattended functions.

## Alert and Action Examples:

- Customers with open A/R invoices over x days
- Open orders older than x days
- Open Purchase Orders that have not been received
- Customers over their credit limit
- Orders with a gross margin less than x
- Items below their order point
- Employees x days past their hire date
- Customers who have not purchased in x days
- Send electronic Invoices
- Email or Fax customer dunning notices
- Send order acknowledgements
- Request P/O delivery status from vendors

- Check order entry to verify margins
- Place customers on credit hold when over limit
- Generate and email Excel sheets
- GL Accounts within x% of budget

## Optional Tool Kit (see screens below)

- Use the optional "Tool Kit" module to connect Info-Alert to other databases and spreadsheets generating custom alerts and actions. Tool Kit can also be used to create new or edit existing alert logic.
- Use the schedule function to let Info-Alert know how often each alert should be reviewed.
- Use actions and events to create files, update data and configure output to vendors and customers.

The image displays three overlapping screenshots from the AccountMate software interface, each with a callout box explaining a feature.

**Top Screenshot: Schedule Function**  
 This window shows the 'Schedule' tab for an alert. It includes options for 'Schedule Frequency' (Daily, Weekly, Monthly, One Time Only, Always) and 'Daily frequency' (Occurs once after, Occurs every). A callout box states: "Use the schedule function to let Info-Alert know how often each alert should be reviewed."

**Middle Screenshot: Notification Configuration**  
 This window shows the configuration for notification recipients. It includes sections for 'E-Mail IDs For Notification', 'Report ID', and 'Event ID'. Each section has a list of items and checkboxes for 'Alert', 'Attach', and 'Action'. A callout box states: "Enter an unlimited number of email or report ID's for notification."

**Bottom Screenshot: Configure Actions**  
 This window shows the configuration for actions. It includes fields for 'Map ID', 'Alert ID', 'Action ID', and 'Description'. It also has sections for 'File Options' (Create Excel, Create ASCII, Create Access, Email Existing File, None) and 'Individual Output' (Email Individual, Fax Individual). A callout box states: "Use Actions and Events to create files, update data and configure output to vendors and customers."

## AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA  
 800-877-8896 | 707-774-7500 | www.accountmate.com

## Software That Fits