

Meeting the challenges of a  
global business community

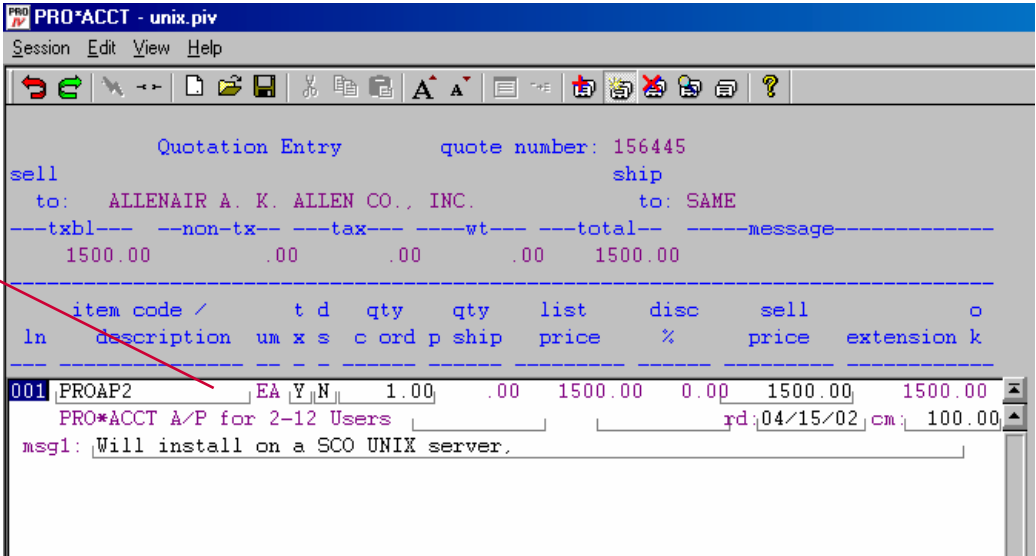
# PRO\*ACCT

Easily separate  
current cus-  
tomers from  
prospective  
customers and  
identify and  
manage hot  
leads.

The screenshot shows the PRO\*ACCT software interface. The title bar reads "PRO\*ACCT - unix.piv". The menu bar includes "Session", "Edit", "View", and "Help". The toolbar contains various icons for file operations and editing. The main window displays a "Quotation Entry" form for quote number 156445. The form is divided into several sections: Customer Information (cust code: ALLENAIR, name: A. K. ALLEN CO., INC., address: 255 EAST SECOND STREET, MINEOLA, NY 11501), Shipping Information (ship to: SAME, address fields, city, state, zip, contact), Quotation Details (quo date: 01/22/02, po no: 156-5959 B0, terms: NET 30, req ship: 04/15/02, fob loc, ship via: UPS Ground, ship terms), Salesperson Information (salesprsn 1: GET GARY TAYLOR, salesprsn 2: DON Don Schramm, salesprsn 3), Pricing (pricing table #, lst upd, total: 12.00), and Remarks (Decision expected by early February, 02). The interface uses a monospaced font and a light gray background.

- ◆ Automatically transfer a prospective customer to current customer status when a quote becomes an order.
- ◆ Manage prospective customer contacts with the combination of the tickler and comment systems. Set a new contact date and the system sends you a reminder message to contact that prospective customer on that date. Detailed comments can be maintained for each contact.
- ◆ Flexible document merging enables you to print labels and form letters to prospective customers or produce a list of all prospective customers in a single category.

Quickly provide a quote for current or prospective customers without committing or allocating inventory.



**KEY FEATURES**

- ◆ Printing labels and mail merge.
- ◆ Printing sales quotes to printer or to MSWord or Wordperfect file.
- ◆ Prospective customer quick lookup.
- ◆ Prospective customer tracking.
- ◆ Sales lead rating of prospective customers.
- ◆ Sales lead tracking with automatic tickling.
- ◆ Sales quotation production.
- ◆ Sales quote confirmation creates sales order, committing invoices.
- ◆ Sales quotes copying from existing to new ones.
- ◆ Task tickler quick look up.
- ◆ Tickler system also connected to tasks list.
- ◆ Unlimited comments.

**REPORTS**

- ◆ Active Leads Report.
- ◆ Open Sales Quotes Report.
- ◆ Prospective Customer Labels.
- ◆ Prospective Customer Listing.
- ◆ Prospective Customer Mail Merge.