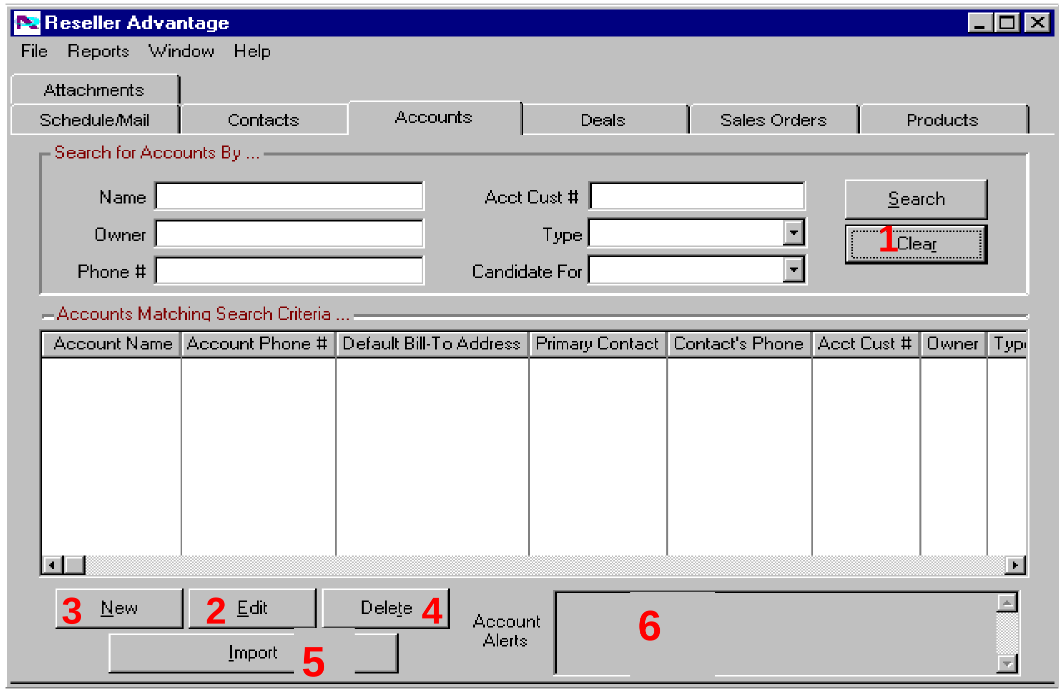
Account Management

Account Search Screen

An Account in Reseller is defined as either ***a person or a company, from which the payments are made***. In other words, when a Contact calls and places an order from you and his company is the actual purchaser; the company is the Account. But, if this same Contact wanted to buy something for personal use and pays for it himself, he is then the Account. Reseller Advantage gives you the flexibility of creating deals for either.



1. Searching for an Account

Searching for Accounts is just like searching for deals or contacts. Enter your search criteria and click **Search**. To clear these fields and start over, click **Clear**.

If you do not enter any search criteria you will be asked to confirm the viewing of all accounts. If the total number of accounts found is greater than your format limit you are asked if you would like to narrow your search.

2. Editing Account Information

To view or change account information, search for and select an Account then click **Edit**, or double click on the selected account. If you are not the owner or not part of the group that owns the account you will only be allowed to view, not change the information or delete the account. The Account Processing Screen opens displaying the selected account. View or edit the account information.

3. Adding a New Account

To add a new Account, click **New**. The Account Processing Screen opens, enter the new account's information.

4. Deleting an Account

The system can be set so that only account administrators can delete accounts. If this is not set then you may delete accounts if you are the owner. Search for and select account, then click **Delete**.

5. Importing Customer information

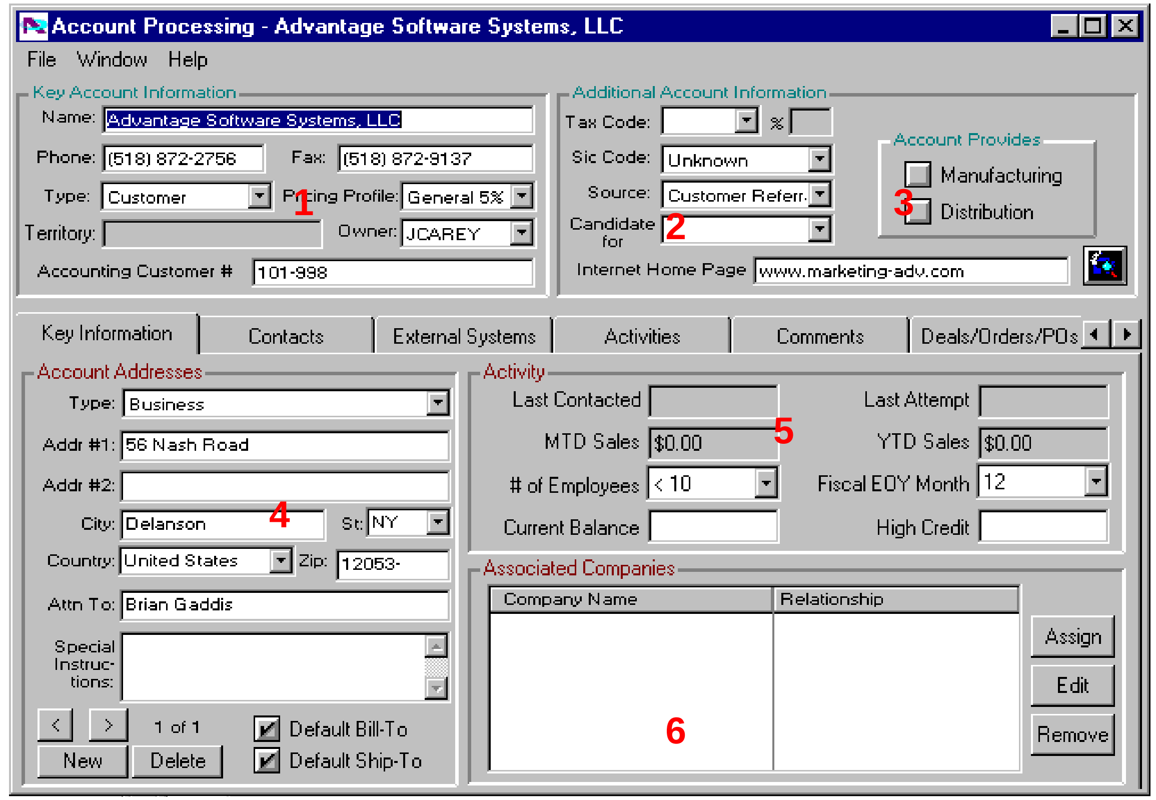
Since most companies have customer master files, Reseller ADVantage supports the importing of existing Account data. To initiate this process click **Import,** it will allow you to select an ASCII comma delimited file containing the accounts to import.

6. Account Alerts

When you click on an account's name, any account alerts are displayed here.

Account Processing Screen

The Account Processing Screen is the window to all current and past information about all of your accounts. It contains a top section that is always visible which includes basic account information, and a lower tabbed section for viewing and processing additional account information.



1. Key Account Information - Containing the legal company name, phone and fax numbers, the type of company (either Customer, Prospect or Suspect), pricing profile (used for discounting), the user ID of the owner of this account, the Accounting Customer Number, and Sales Territory, which is automatically selected based on the company's default bill-to address Zip Code.

2. Additional Information - This area is used to designate the tax code (*relates to a %*), sic code (*type of Business*), source (*how referred*) and candidate for (*what customer needs*).

3. Account Provides - This is an area used to designate this account as a manufacturer and/or distributor that you purchase products from.

Key Information Tab

4. Account Addresses - Business, Bill to, Ship to, Invoice to, Home, and Location address spaces are all provided. Different address types can be added by your system administrator.

5. Activity - From here you can view the latest account activity, Last Contacted date, Last Attempt at contact, MTD Sales, YTD Sales, # of Employees, Fiscal EOY Month, Current Balance and High Credit.

6. Associated Companies - Lists all companies that are associated to this account, such as parent company, Bill-to company, etc.. With **Assign, Edit** and **Remove** you can maintain and view associated company information.

Contacts Tab

1. Contacts

A listing of all of the contacts that work for this company.

Set as Key allows you to set a selected contact as the main key contact,

Assign Division Contact allows you to set division key contacts. (A division must be selected in the drop down box.)

Assign, **Edit** and **Remove,** allow you to view and maintain the company contacts.

2. Contacts Hierarchy

Allows you to view how contacts fit into the structure of a company either by department or by a hierarchical org chart.

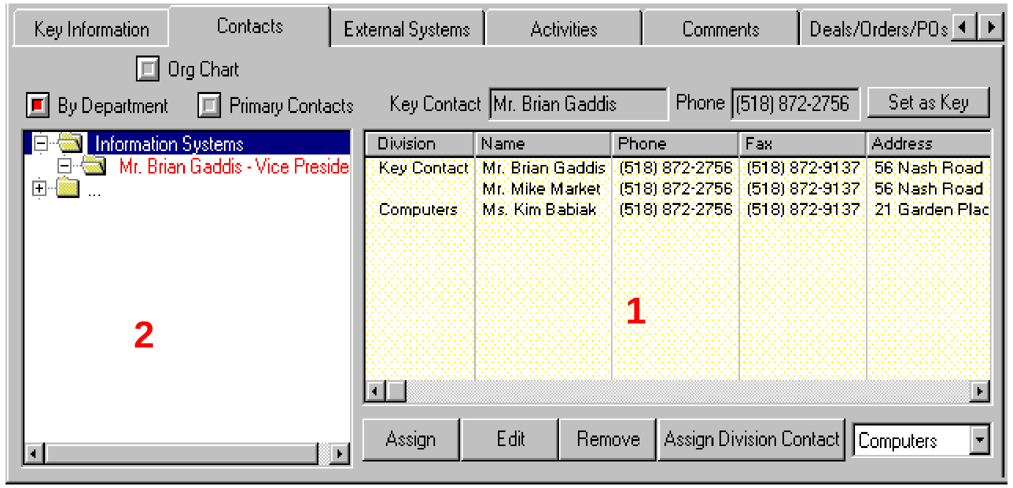
External Systems Tab

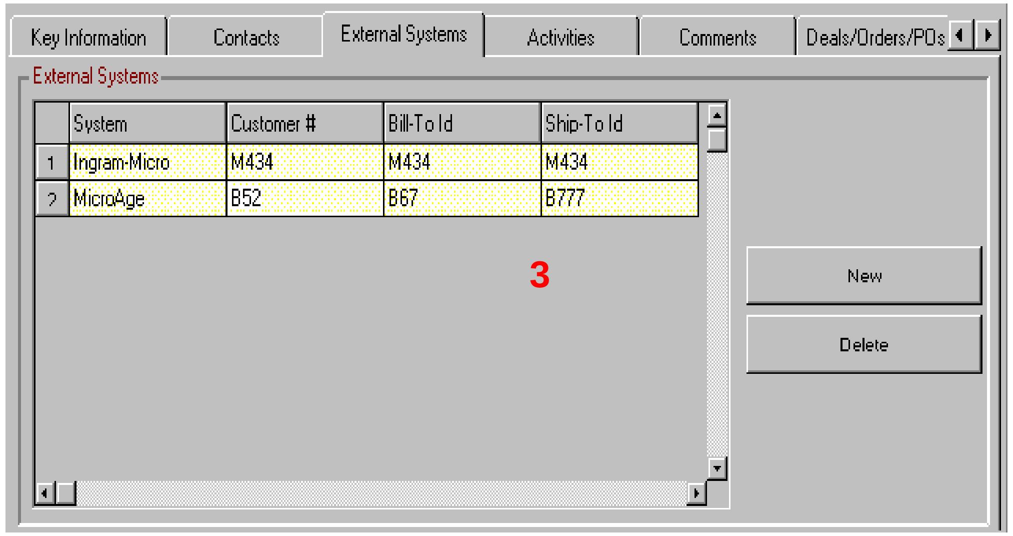
3. External Systems

Each Account is known to other external systems by different id's. You have the ability to specify 3 different id's. A Customer id, a Bill-to Id and a Ship-to Id. If you have user administration security this tab will be displayed.

To add New a system, click **New,** and a new entry will appear in the list box.

To Delete a system, click on the system you want to delete and then click **Delete**. You will be asked to confirm the deletion.

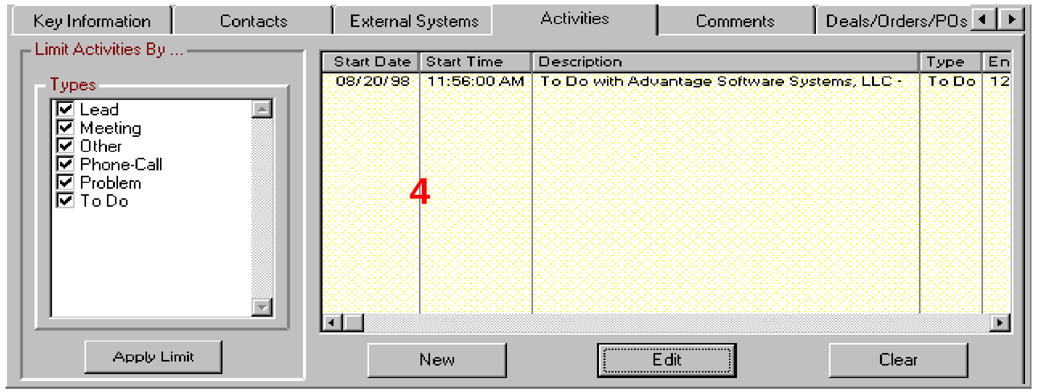




Activities Tab

4. Activities

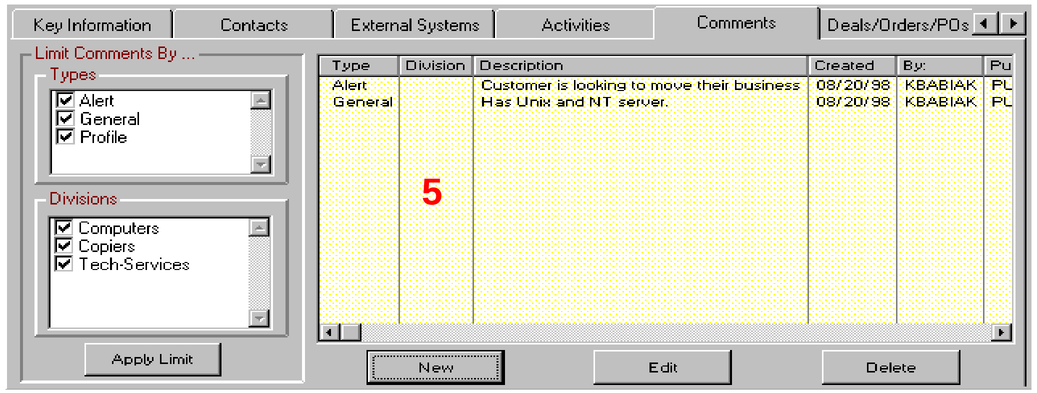
A listing of all of the activities for this company are listed here, regardless of who is involved or where it happened. This will keep everyone up to date on the activities planned and completed (depending on their access rights). Leads and Problems are maintained from here.



Comments Tab

5. Comments

The comments area displays a list of every comment made about this company. Alerts and Company Profiles are included here. Only one profile per division can be created and only the division sales rep can create or change it.



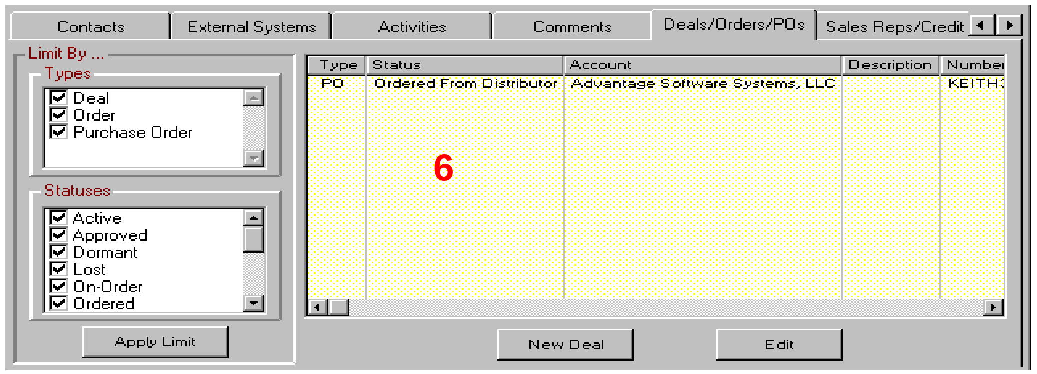
Deals/Orders/PO's Tab

6. Deal, Order, and Purchase Order Information

This displays one line about every current and past deal, order and purchase order with this company. (double clicking on it will open it in the Deal, Order or Purchase Order Workbook where complete details are available).

To start a new deal, click **New Deal.** The Deal Workbook opens with the Account entered.

*You can limit the contents of the Activities, Comments and Deals list by selecting the types, divisions and status's you want to see and clicking **Apply Limit**.*



Sales Reps/Credit Tab

7. Division Sales Reps

An account can have only one key sales rep but different sales reps may be assigned based on what expertise they have so if an account is looking for a particular product or service the correct rep can be found.

To add a sales rep, click **Assign,** and a new entry will appear in the list box.

To remove a system, select the Sales Rep you want to remove and then click **Remove**. You will be asked to confirm the removal.

8. Credit

This displays the customer's primary line of credit showing amounts, approvals and dates.

Equipment Tab

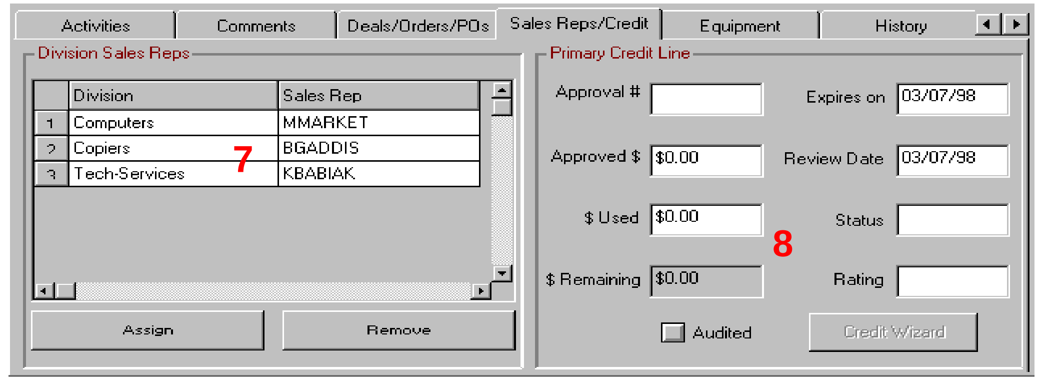
9. Equipment

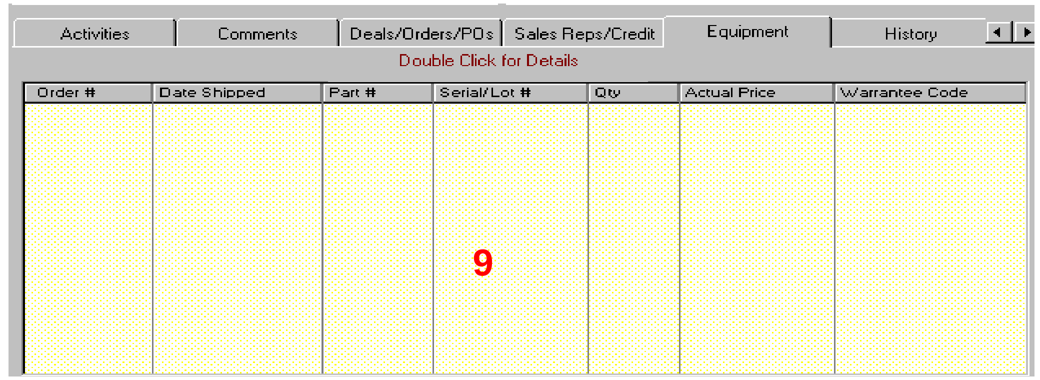
This displays all the equipment the account has purchased from your company and all warranty information.

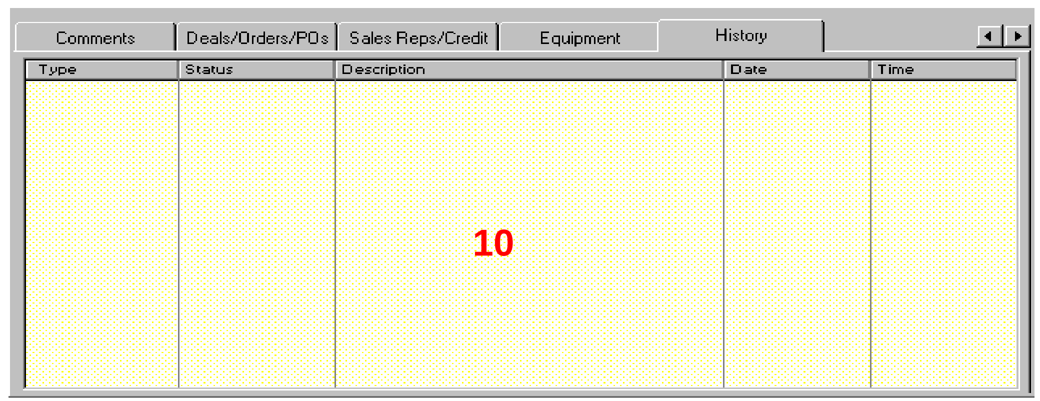
History Tab

10. History

Every key activity (created, name changed, activity completed, etc.) is recorded and will be displayed here. This will provide you with a detailed timeline of all account activities.







Reseller ADVantage®

Account Management Feedback Page

Concerns and Suggestions

From:
Company:

Date:

Please fax to (518) 872-9137