

## Client

NexLAN, LLC  
nexlan.com

## Type of Business

AccountMate Business  
Partner and Vertical  
Solution Provider

*"Since INFOtrac for AccountMate centralizes access to all actions, documents, emails and user calendars through an XP-inspired interface, every staff member becomes an instant expert on communications with the client."*

– Kevin Stroud, CEO,  
NexLAN, LLC

## Providing Customer-centric Service

Every business is in the service industry. Whether you manufacture pens or provide health care, the relationships you build with vendors and customers are what drive your success.

### The Challenge

When AccountMate announced their partnership with INFOtrac, they presented their Business Partners with an opportunity to provide a CRM solution for their clients. As a Business Partner, NexLAN was encouraged to learn about INFOtrac's seamless integration with AccountMate and decided to test the waters before making an official recommendation to their clients.

### The Solution

NexLAN installed the INFOtrac for AccountMate module in-house and began utilizing it as they conducted their day-to-day business.

Two months after implementing INFOtrac for AccountMate internally, NexLAN is enthusiastically recommending it to their clients and to other AccountMate Business Partners. NexLAN has gained efficiencies with their internal processes as a result of using INFOtrac for AccountMate. They describe their processes as "dramatically improved".

### Action Tracking

INFOtrac for AccountMate's action tracking has boosted personal productivity as well as communication between staff members. Instead of managing the day with a long, unsortable list of Tasks in Microsoft Outlook or a rainbow of sticky notes, actions entered in INFOtrac for AccountMate are linked to a company and specific contact.

Once an action is completed, it is logged to History (still tied to the company) and the user is automatically prompted to create a follow-up action. No longer must an entirely new entry be created as a reminder to keep tabs on progress. The entire process is built-in.

Integrating email through Outlook has maximized the tracking of client communications. Tedious searching through "Sent Items" has been replaced by a glance at History.

### Supporting Current AccountMate Customers

NexLAN uses INFOtrac for AccountMate to keep tabs on client data, from support IDs to support plan renewal dates. From a single screen, the staff can identify the client's current build, the modules in place, source code modules, integrated third party applications, the states ordered with their last Payroll subscription and more. When viewing specific client records, only necessary fields are displayed. For example, NexLAN don't have their screens cluttered with blank fields for networking or ISP services.

While many CRM packages claim to link to the accounting system, INFOtrac's tight integration with AccountMate has palpable functionality and value. The two are linked seamlessly. An address update or contact change made in one system is instantaneously reflected in the other.

INFOtrac also links to AccountMate's real-time accounting data to provide the current account balance, terms and even produces a full customer statement—without ever logging into AccountMate. It's enough snapshot information to answer common client questions without having to navigate the extensive accounting data.

In cases where employees aren't required to enter or view actual accounting data from AccountMate, they can still have access to INFOtrac for AccountMate's contact management functionality. Additional seats are available for purchase.

## Managing New Leads

INFOtrac for AccountMate allows NexLAN to track progress when cultivating leads in the same place that activities are tracked for existing clients but without muddying up the accounting data. Once a prospect becomes a client, it's a matter of seconds to activate them in AccountMate.

Best of all, INFOtrac for AccountMate provides a powerful finder and extensive, customizable reporting functions. In a flash, any staff member can run a report of leads including "next action" details or provide a listing of all clients with past-due accounts.

## Internal Resources

The INFOcenter has quickly replaced NexLAN's menagerie of network folders. It provides a central location for corporate policies as well as AccountMate resources and vertical solution documentation. As a supplement, the Question/Answer knowledge base provides a searchable database of common troubleshooting questions and their resolutions.

## The Learning Curve

INFOtrac for AccountMate draws upon the functionality and processes of the Microsoft programs users already know including Outlook, Word and Excel. INFOtrac for AccountMate features an intuitive layout and supported by extensive help documentation that makes it simple to operate and customize – even before formal training. Questions that arise have been resolved in a timely manner with comprehensive answers.

## The Results

At first glance, INFOtrac for AccountMate appeared to be a competent CRM solution with good integration with AccountMate accounting data. It took only a few minutes of hands-on experience for the power of INFOtrac for AccountMate to become apparent. INFOtrac for AccountMate complements the AccountMate financial software application beautifully; not only for its power but for

its customization. Out of the box, the fields can be displayed "in your own language". The screen designer collects needed data, but keeps detailed information off of the main screen. Thanks to the powerful scripting tool, there are endless business process automation possibilities.

NexLAN has found that maintaining contact with their most valuable clients has improved significantly. Calls and contacts never "fall between the cracks" as sometimes happened with the assortment of manual and automated record keeping processes. In addition, with all communication being stored for each client in a single place, it's easy to answer clients' inquiries about prior quotations and contacts while they are on the phone. The net result is superior customer-centric service from everyone who is in contact with clients and prospective clients.

## About NexLAN

NexLAN is recognized as a leading technology partner in the Midwest, with a client list spanning Fortune 500 clients to locally owned small businesses. NexLAN is honored to have been recently selected as one of eleven Killer VARs selected by Accounting Technology for 2005 and has been recognized as the top AccountMate business partner in the Central U.S. Region for the past two years. NexLAN is a Microsoft Certified Partner and AccountMate value-added-reseller specializing in network support, mid-tier manufacturing/ accounting solutions and custom software development. For more information contact [www.nexlan.com](http://www.nexlan.com).

## About AccountMate

Founded in 1984, AccountMate develops and markets fully customizable business management software designed to meet the growing needs of small to medium-sized businesses. Systems range from single user versions to those that support over hundreds of users simultaneously. AccountMate software is available for local installations or cloud deployment. It is distributed exclusively through a worldwide channel of authorized solution providers. AccountMate can be reached at (800) 877-8896 or [www.accountmate.com](http://www.accountmate.com).

## AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA  
800-877-8896 | 707-774-7500 | [www.accountmate.com](http://www.accountmate.com)