



# INFOtrac SQL and INFOtrac SQL Mobile Customer Relationship Management

## Product Description

INFOtrac is a Customer Relationship Management (CRM) solution that manages and reports on every interaction entered for a prospect, client, supplier, contact, or branch office. It is available for unlimited number of users and increased scalability. It will even schedule the next appropriate interaction—enabling exceptional account management and customer service. With just a glance, you can view all the past interactions with each contact providing the ability to track activity, issues and interactions with all your clients. It will even manage your meetings, phone calls, e-mail and daily tasks.

Contact information is easily searchable and manageable so you can access required records quickly in order to generate reports, mail merges or other customer service/management relate activities. INFOtrac works with programs like Microsoft Office so data can be merged and utilized in other programs to create custom mailings, mass e-mails, reports or other necessary business documents.

INFOtrac also provides for superior customization. Fields and screens can be customized to the way your business work flows. Contacts can also be grouped and segregated into different categories, creating a flexible reporting system. Contact lists for mass e-mails can be created “on-the-fly” to insure quick and easy communication between you and your customers.

INFOtrac SQL inherits key accounting data form AccountMate, also giving you access to it from INFOtrac SQL Mobile.

### Includes:

- **Key CRM (Customer Relationship Management) functionality**
- **Key SFA (Sales Force Automation) functionality**
- **Both the Quotation module and the Order module** (via AccountMate) allow for INFOtrac SQL to post a quote to AccountMate software system as a quote. Only INFOtrac SQL quotes are posted into AccountMate.
- **Opportunity Management** module provides the ability to track and manage prospective sales with a dashboard view of all business in the sales pipeline.
- **Remote Synchronization** option allows users world-wide to run INFOtrac SQL on their desktop or notebook computers without having to be connected to the Internet.
- **Mobile Apps** for INFOtrac SQL Mobile are available in the Apple App and Google Play stores. It takes advantage of your mobile device’s native functions for email, phone, mapping, and more.

## Company Profile

For over 15 years, INFOtrac has met the Customer Relationship Management (CRM) needs of small and mid-sized companies throughout the world. INFOtrac offers the type of functionality found in enterprise-wide solutions, scaled to affordably meet the needs of smaller organizations, and corporate departments that specialize in exclusive business processes.

## KEY FEATURES

- Quick access to current information on clients and contacts creates a knowledgeable workforce
- Immediate access to your clients’ complete history provides exceptional customer service and client retention
- Automatic management of your meetings, phone calls, e-mails and tasks saves time and money
- Perceptive reporting and analysis of pertinent, real time information provides insight into business operations and identifies growth opportunities
- Real-time access to INFOtrac and AccountMate data on any iOS or Android mobile device

## PRODUCT COMPATIBILITY

AccountMate SQL and Express versions 9 - current

## CONTACT

Contact your local AccountMate Solution Provider or get information on a solution provider in your area by emailing [sales@accountmate.com](mailto:sales@accountmate.com) or [www.accountmate.com](http://www.accountmate.com)

## PRODUCT LINKS

[Product Information](#)  
[Product Webinar](#)  
[Remote Synchronization](#)  
[INFOtrac SQL Mobile](#)  
AccountMate Case Studies:  
[NexLAN](#)  
[Preferred Credit](#)  
[Dixie Iron Works](#)  
[EnvirOx LLC](#)