



Key Features for the Credit Department

Automated Notifications

When customers are added to the system, your credit department is notified by E-mail.

When customers are approaching their credit limit, the credit department received an automated email so they can act *before* a customer is over their terms

Sales-reps are automatically notified if their customer short-pay's or is over their credit limit.

E-Commerce

We can also interface your system with Trans-credit and Dunn & Bradstreet. Your clients will be able to view their own credit information, unbilled shipments and POD's on your web site.

File Management

Credit department personnel have options to store MS Excel and Word documents with each customer's record so rate agreements, contracts, tariffs and other key information is stored right where its easiest to find them.

E-Statements

Your sales-reps will have the ability to send the customer accounts receivable aging, invoice or POD at the touch of a button.

Burst Email

You can send out word documents to selected customers. Keep your clients in the loop about your credit policies. This feature allows your reps to contact thousands of clients in minutes.



Key Features for the Credit Department

Instant reporting

The credit area is designed to facilitate good decisions. With YTD, last 365 and last 30 day totals and averages, it allows a credit manager to instantly understand what kind of activity and payment history a customer has generated.

Credit managers have options to E-mail and fax past due letters, balance due statements, scanned images of pod's and invoices.

Instant Reporting linked to Email & Faxing

In only a few keystrokes you can view, email or fax a variety of forms or reports. Amazingly, all of these functions only take a few seconds to select & process.

- Recent Activity
- Accounts Receivable Aging with links to pod & invoice
- Various Form Letters
- Memo's
- Recent Payments
- Sales Quotes
- Sales Charted in a Graph
- Insurance & Authority
- Credit Application
- Driving Directions
- Rate Agreement
- Customer Package