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Headline News

Best Software reported record revenue for the 2003 business year. Total revenue was \$424.7 million, and operating income was \$99.1 million, increases of four percent and 17 percent, respectively, over the same period of the prior year.

ACT!, Best Software's best-selling contact management solution, has been awarded the "Willy Award" for Best SOHO CRM solution by SellMoreNow.com. "Willy" refers to the character, Willy Loman, in the Arthur Miller play *Death of a Salesman*.

Congratulations to Best Software on a successful year!

Point Of Sale

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for more info!

Providing Exceptional Customer Service

Winning new customers is a good thing, right? Of course it is. However, an even more crucial element in your company's success is keeping the customers you have. By some estimates, it can cost up to ten times more to acquire a new customer than it does to keep an existing one. Customer retention is crucial for any business to remain competitive in the marketplace. In fact, recent business studies show that increasing customer retention rates by just 5% can lead to a 25%-95% increase in profits!

Just what does it take to retain customers? What builds loyalty in your customer base? Certainly quality products are a major consideration. But equally as important is the customer service you provide. Customers want to buy from a company that offers the products they need backed by exceptional service. BusinessWorks Gold is rich with the features and functionality to support your commitment to exceptional service. In this article we'll highlight some of those features.

Make It Easy

Are you making it as easy as possible for customers to do business with you? Do you have a toll-free phone number? A Web site? Are your business hours convenient for your non-local customers? Consider offering expanded warranties or money-back guarantees if that is what your customers want. BusinessWorks Gold is an

excellent tool to support your efforts. The efficient Order Entry Module makes it easy to provide your customers with quotes, and later to quickly convert those quotes to orders and invoices. With information at your fingertips you will be able to answer customer questions about account balances, overdue in-



Quality products and excellent customer service are what it takes to keep your customers happy and loyal.

voices, and purchase history. Add the Statement Printing and Reprint Invoices tasks to your shortcut bar. Then, while you are on the phone with a customer, you can generate a statement or reprint an invoice and send it to your customer by email, all without leaving your desk.

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Compliments of:

Best
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Customer Service Continued

Make It Fast

In this era of on-line ordering and overnight delivery, you must strive to get your products into your customers' hands as quickly as possible. Half of this equation involves having the appropriate quantities in stock at all times. The **Inventory Module**, with its purchasing component, will help ensure you can meet demand. The other half involves quickly getting the product out the door and on its way to your customer. In a previous issue of **info* we featured **StarShip** and the **StarShip Link to BusinessWorks**. **StarShip** can help streamline the entire shipping process and add efficiencies that save both time and money. Not only does **StarShip** calculate the freight charges and produce bar-coded shipping labels, it can even shop for the lowest rates to your customers' shipping destination. If you ship your products using any major carrier, **StarShip** can make this process faster and more convenient.

Know Your Customers

The **Accounts Receivable Module** lets you define up to five custom fields that you can use to track information about your customers. If you are not yet utilizing these fields, please consider doing so—they can provide valuable insights into your business. Create a Referral Source field to enable you to target your marketing budget where it's most effective. For example, you could discover that you won 25 new customers and \$50,000 of new business from your fall trade show. Create another field for Region, allowing you to analyze from where you are drawing your customer base. These custom fields can be included in **Custom Reports**, **Custom Exports**, **Custom Worksheets**, and **Custom Forms** enabling you to perform detailed analysis about who is buying from you. Such knowledge translates to power—the power to make insightful business decisions.

BusinessWorks Gold does an excellent job of retaining customer purchase history. Use this history to your advantage. In our Order Entry article (page 3) we highlight the **Part History Inquiry** available when entering an order that provides a quick history of the customer's item purchase history. The **Accounts Receivable Customer History Report** provides a snapshot

of a customer's month-to-date and year-to-date sales, adjustments, average days to pay, and finance charges. Reviewing this report makes it is easy to identify a sales trend such as a significant monthly decline. By analyzing your customers' buying habits, you are in a better position to offer them more of what they need, when they need it—which equates to excellent customer service.

BusinessWorks Gold Notes is an excellent location for keeping bits of important information such as customer birthdays, the customer's Web site address, directions to the customer's office, details of telephone conversations, shipping preferences, secondary contacts, etc. Remember, these notes are available from most locations—Order Entry for example; so encourage your staff to check these notes during each customer encounter.

Know Your Products

When a customer calls, they expect expertise on the other end of the line. Empower your sales representatives and customer service team with as much information as possible about the products and services you offer. Attach an image, product specifications, or a schematic to the item file. The **Inventory Control Module** provides the ability to attach an image file to a part. To associate other attachments, you will need the **Custom Office Module**. Create a substitute item list for each part to ensure that even if you are out of stock of a requested item, you can offer a comparable alternative. Utilize the **Low Stock Report** to ascertain on-hand versus on-order quantities and then make intelligent buying decisions. Run the **Margin Analysis Report** frequently to ensure you are charging an appropriate amount for items, or to help make the determination to discontinue an unprofitable item or product line. Get familiar with the **ABC Analysis Report**. This report identifies which parts are most crucial to your operation. Parts are listed from the highest year-to-date cost of goods sold to the lowest. Each part is then evaluated by determining its percent of the total value. You may want to set tighter inventory controls and procedures for the more expensive parts. Understanding which are your most profitable and costly parts

may not immediately seem like it is related to good customer service. However, such analysis is all part of the overall success of your organization—allowing you to stay competitive in your marketplace and remain a reliable and viable partner to your customers.

Stay In Touch

Letting your customers know you're thinking of them keeps your company's services at the top of their mind. Use the **Custom Office Mail Merge** or **Instant Correspondence** features to create a letter or email to a group of customers or one specific customer. Build a library of documents to send at certain milestones in your customer relationships—a new customer welcome letter, credit terms awarded, credit limit increased, invoice past terms, announcement of a new sales rep, etc. When you introduce a new product, send buyers of similar products an email announcement. The **Mail Merge** function makes it easy and convenient to communicate proactively with your customer base. Use it creatively to promote your business in a professional manner—send a New Year's Greeting, announce a change in support hours, introduce a new employee, or promote a sale.

Offer Choices

We all want choices. One customer may prefer to receive invoices in the mail, another via fax, and a third may prefer email. **BusinessWorks Gold** makes it easy to offer these choices to your customers.

Do you have customers that prefer to pay by credit card? **BusinessWorks Gold** provides dedicated fields to hold customers' credit card information, making it convenient to offer this payment option.

One proven method for increasing customer retention is providing exceptional customer service. Good customer service is not the solely the job of the sales staff—everyone in your organization needs to join the commitment to excellence. Consider the suggestions here and incorporate your own ideas.

Let us know how we can be of assistance. ☆

Order Entry Makes Selling Job One

Sailor's Supply Company is getting by—just getting by. They write out customer orders by hand on three-part forms, send one copy to the warehouse and another to accounting. When they run out of stock of an item, that paper form sits around in somebody's in basket, waiting for the product to arrive—unless it gets lost or misplaced. Quotes get typed up in Word, calculator at the ready to factor in discounts and calculate tax. They have no way to know what parts are on order or on backorder. Does any of this sound like your company? If so, have you considered how adding a bit of automation could dramatically increase your productivity and even your profitability? **BusinessWorks Gold Order Entry** will automate your ordering and invoicing procedures while adding convenience and efficiency that lead to smooth sailing.

Powerful Features

Order Entry has the same look and feel of **Accounts Receivable**, making it easy for users to master the entry of quotes, orders, and invoices. Quickly create custom quotes for your customers including part numbers, non-stock items, and labor charges, then either print and fax them, or email them directly from within **BusinessWorks Gold**. When a new customer calls, enter their information on-the-fly from within **Order Entry**, saving you the hassle of opening up a separate **Maintain Customers** window. **Invoice Entry** performs credit limit and on-hold checking to alert you if your customer has exceeded their credit limit or has been placed on credit hold. Need to include a note in the lines section meant for internal eyes only? Choose **Hidden Comments** when you don't want the comments to appear on printed forms. When you are ready to invoice and ship orders, you can either invoice each order individually, or create many invoices automatically, based on the series of sales orders you select.

Informative Reports

More than one dozen informative reports put crucial information at your fingertips. **Picking Tickets** will assist you in collecting inventory parts prior to shipping, and **Packing Lists** can be included with the shipment to your customers. You can even email a PDF copy of the Packing List to your customer, effectively providing an advance shipping notice. A **Back Order Fill Report** details which parts are now available

and which orders contain parts that can now be shipped (either fully or partially) due to receipt of parts into inventory. The **Gross Profit Report** lets you review sales and profit information on an invoice-by-invoice basis, including gross profit and profit margin. You can produce a commission report by including only paid invoices and sorting by sales rep. The **Sales Analysis Report** offers similar data, but the data is sorted by inventory part, which allow you to quickly identify sales and profit information on a part-by-part basis.

Ship To Addresses

If they haven't yet, sooner or later your customers will request that you ship their order to an address different from their billing address. The **Order Entry** module enables you to enter and



Let the power of **Order Entry** help you to quickly turn orders into shipments.

maintain up to 500 separate shipping addresses for each customer. Select the correct address during order entry, or choose to enter a one-time shipping address that is not saved for future use.

Partial Shipments

Using **Order Entry**, you are able to partially ship an order, leaving the remaining items backordered on the open order. This feature lets you ship parts faster, resulting in happier customers and an increased cash flow as now you can invoice for the parts you are able to ship.

Kits Add Convenience

When a customer buys a cruising guidebook, Sailor's Supply Company offers a free chart to go with it. **Order Entry Kits** offer the perfect mechanism for this type of offer. If you sell two or more items grouped together, you'll find

the kit feature in **Order Entry** a real time saver. Although similar to **Inventory Control's** Subassemblies, on-hand quantity is not maintained for kits, and each item in the kit appears on quotes, orders, and invoices as a separate line item with a separate quantity. In other words, you do not build kits like you build subassemblies. Kits are simply collections of parts, which are typically sold together, often with special pricing. Setting up predefined kits helps to ensure accuracy—there's less to enter, so there's less opportunity for error.

Inventory Interface

Inventory is not required to operate **Order Entry**; you may continue to sell **Standard Items** maintained in the **Accounts Receivable** module. However, **Inventory** does add tremendous functionality and should be considered as part of your complete distribution solution.

Users can inquire into part information with the click of a button when entering **Quotes**, **Orders**, and **Invoices**. The **Part Information Screen** presents pertinent information such as: committed, backordered, available, on-hand, and on-order quantities, ship weight, substitute parts, and even an image of the part.

Before implementing **Order Entry**, Sailor's Supply might have lost a sale when a customer ordered an out-of-stock item. Now, entry clerks are presented with a list of substitutions for out-of-stock items and can easily select these substitute parts while processing quotes, orders, and invoices. Customers appreciate the extra care this shows, and it means orders get shipped and invoiced today!

A convenient **Part History** button appears once you enter a part number on an **Order**, **Quote**, or **Invoice**. Press it to display the customer's purchase history of the item. You will see the invoice number, date, quantity, price, discount, and the sales rep. This provides an excellent reference when your customer asks, "How many of these did I buy last time?"

If you've been *just getting by*—entering invoices in **Accounts Receivable**, resolve to improve the service you offer your customers and increase the efficiency involved in getting your products out the door. **Order Entry** is both powerful and easy to use, give us a call for further information. ☆



Spotlight On BusinessWorks Point Of Sale



Small retailers often struggle to find a viable point-of-sale solution that meets both the needs of the front office and those of the back office. BusinessWorks Gold is the ideal back office solution for many small and mid-sized businesses that rely on its powerful accounting and inventory control features. **Attitude Positive** has married that power with its comprehensive, yet easy-to-use, retail point-of-sale solution—**AccuPOS Retail**. The result is a solution for small retailers that offers features you might only expect to find in much more expensive solutions.

What Is AccuPOS Retail?

AccuPOS Retail is a graphical point of sale software solution, developed by Attitude Positive, for BusinessWorks Gold users who operate in a retail environment. AccuPOS Retail turns your computer workstation into a virtual cash register enabling users to collect sales information using a bar code scanner, touch screen, or manual entry. AccuPOS Retail offers built-in integration with BusinessWorks Gold Inventory Control, Accounts Receivable, Cash Management, and General Ledger modules, providing you with a complete retail accounting solution.

Interface To BusinessWorks Gold

AccuPOS Retail was designed to interface to BusinessWorks Gold, so the integration is straightforward and robust. You maintain items and customers in BusinessWorks Gold, and import that data into AccuPOS Retail on any schedule you desire. In the end-of-day file, AccuPOS Retail will report to BusinessWorks Gold what was sold, for how much, to whom, and adjust the inventory, update sales accounts, and post tendering totals to un-deposited funds. No additional interface modules, import routines, or custom programming are needed. AccuPOS Retail writes results directly into your BusinessWorks Gold data files. AccuPOS appropriately updates all Sales, Cost of Goods Sold, Sales Tax, Inventory, and Customer Account fields. The sales-related data transferred to BusinessWorks Gold depends upon whether or not a customer was referenced during the sale, and whether a customer paid with cash or on account. One summarized invoice is created for all cash transactions from the AccuPOS Retail Point Of Sale with no customer reference. Individual paid invoices are created for all cash transactions where a customer was referenced. Individual open invoices are created for all customer account transactions (i.e. paid on terms). Within the **Inventory Control Module**, AccuPOS Retail will: update totals of individual items sold and the sale amounts; adjust the inventory quantity on hand; and create the appropriate General Ledger postings based on the product lines of the parts sold

Features Of AccuPOS Retail

Your BusinessWorks Gold customers and items are available to you from within AccuPOS Retail, plus new customers can be added on-the-fly at the point of sale. Both cash and charge transactions on a customer account create invoices in BusinessWorks Gold, enabling you to run accurate sales reports.

AccuPOS Retail supports BusinessWorks Price Level pricing, so there's no need to worry about over or under charging your customers.

You can set up separate posting accounts for each tender type, such as check, Visa, or MasterCard adding a finer level of detail and making end of day reconciliation easier.



contact

Best Accounting Software Consulting, Inc.

5325 Topaz Avenue
Rocklin, CA 95677

(916) 624-7243
(916) 624-7244 fax

Email: jay@bestasc.com

Web: www.bestasc.com

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Security is well provided for within AccuPOS. Set up user groups (e.g. Clerk, Supervisor, Manager) and assign security levels to each group. Within the user groups, set up individual users and their passwords, and the number of idle minutes before a user is automatically logged out.

Optional Features

Add **Wasp Bar Code Labeler** software and you will have the ability to print bar coded item labels in a variety of formats from within AccuPOS Retail.

With the inclusion of **PCCharge Pro**, you can validate customers' credit card numbers instantly as part of your point-of-sale transaction. PCCharge supports virtually all the credit card processors in the country, so you can select the processor of your choice.

Hardware And System Requirements

AccuPOS Retail requires a PC with a Pentium III or higher, 128MB RAM, Microsoft Windows 2000 or XP. You also may want to include an electronic cash drawer, credit card reader, bar code scanner, customer display, programmable keyboard, receipt printer, and/or a touch-screen monitor. AccuPOS Retail is compatible with most point-of-sale hardware peripherals, but please check with us before you purchase to ensure compatibility. AccuPOS Retail and BusinessWorks Gold combine to offer an efficient and user-friendly solution for small retailers. Call us today for a demonstration of the power of this pair.

