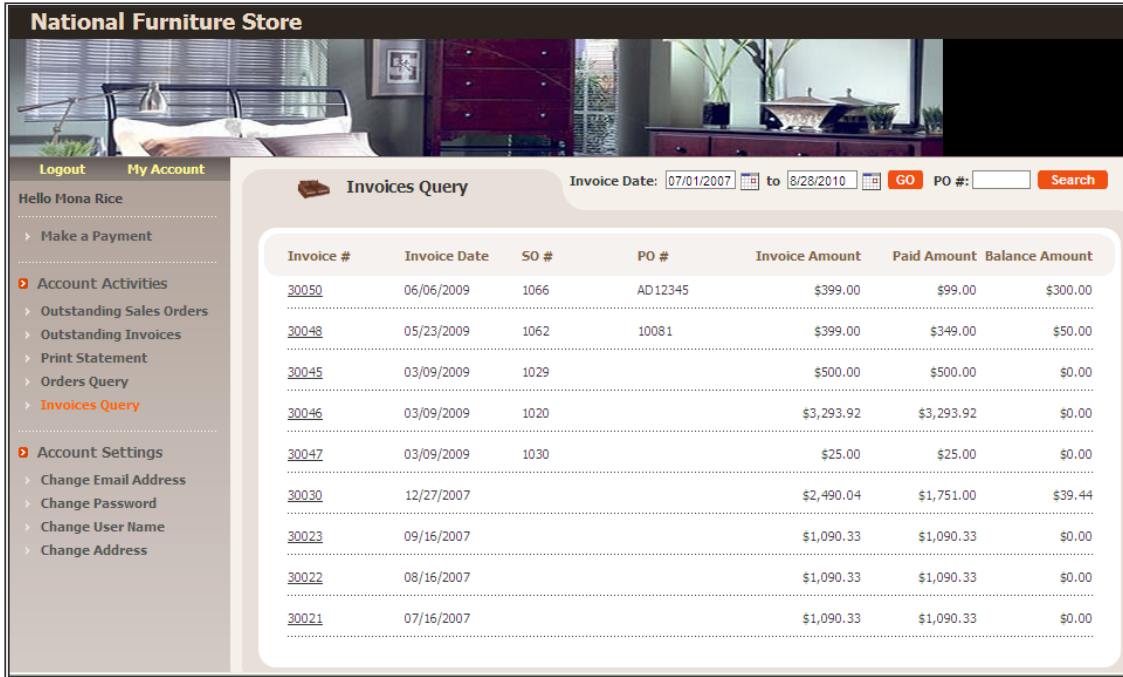


AppFinity Customer Portal for AccountMate SQL

FACT SHEET

AppFinity **Customer Portal for AccountMate SQL** opens a self-service access to your customers, allowing them to view detailed order history, check order status, review outstanding billings and make payments, print statements and update their profiles round the clock.



National Furniture Store

Logout My Account

Hello Mona Rice

- Make a Payment
- Account Activities
 - Outstanding Sales Orders
 - Outstanding Invoices
 - Print Statement
 - Orders Query
 - Invoices Query**
- Account Settings
 - Change Email Address
 - Change Password
 - Change User Name
 - Change Address

Invoices Query Invoice Date: 07/01/2007 to 08/28/2010 GO PO #: Search

Invoice #	Invoice Date	SO #	PO #	Invoice Amount	Paid Amount	Balance Amount
30050	06/06/2009	1066	AD12345	\$399.00	\$99.00	\$300.00
30048	05/23/2009	1062	10081	\$399.00	\$349.00	\$50.00
30045	03/09/2009	1029		\$500.00	\$500.00	\$0.00
30046	03/09/2009	1020		\$3,293.92	\$3,293.92	\$0.00
30047	03/09/2009	1030		\$25.00	\$25.00	\$0.00
30030	12/27/2007			\$2,490.04	\$1,751.00	\$39.44
30023	09/16/2007			\$1,090.33	\$1,090.33	\$0.00
30022	08/16/2007			\$1,090.33	\$1,090.33	\$0.00
30021	07/16/2007			\$1,090.33	\$1,090.33	\$0.00

Key Benefits

- Provides a shared view of data between company and customers for greater transparency.
- Self-service access to your customers to manage their accounts.
- Automated payment processing lessens clerical errors.
- Reduces unnecessary administrative and overhead costs.
- Helps you keep up with increasing sales volume while minimizing costs.
- Online, real-time integration with AccountMate SQL.

www.appfinity.com

With the Customer Portal, you can empower your customers by providing them complete access to up-to-date and accurate information. It is a cost-effective solution that eliminates countless phone calls to verify the status of sales orders. By enabling your customers to make payments in the system, it will lessen time-consuming paperwork to reconcile accounting discrepancies resulting from incorrect billings and payment applications. The added convenience at your customers' fingertips and the reliable automated payment entry processing result to an improved customer relationship, a sure win-win for both your business and your customers.

AppFinity Customer Portal and AccountMate SQL systems are linked to each other thereby enabling the transferral of a multitude of information from Customer Portal to AccountMate, and vice versa. The synchronization is automatically done, in real time. There is no need to manually import or export data ensuring accuracy of transferred data.

Key Features

Update Profile

In the 'Account Settings' menu, customers can make changes to their personal information and change their Email address, account username and password in the Customer Portal, billing and shipping addresses.

View Orders And Invoices History

The 'Account Activities' menu provides your customers with a snapshot of their accounts. On this menu, they can check their outstanding sales orders and invoices, view full order history for previous orders, and preview their statements. For each sales order, the system provides details on the shipped amounts and amounts on backorder.

Make Payments Online

The 'Make a Payment' function enables your customers to pay online. They can view their outstanding invoices and pay any amount or the full balance using a credit card. With an online credit card payment gateway installed, the payment will be deposited to the company's bank within one business day.

The Customer Portal also extends your billing and collection facilities by providing your customers with updated balances of their accounts online and in real time. This enables customers to review their accounts anytime and spot any possible discrepancies sooner. With this capability, your accounting department can avoid the time and expense of generating and mailing hard-copy statements to your customers. The customer can click on the 'SO #' or 'Invoice #' link to print/preview the entire sales order or invoice.

Invoice #	Invoice Date	SO #	PO #	Invoice Amount	Paid Amount	Balance Amount
30050	06/06/2009	1066	AD12345	\$399.00	\$99.00	\$300.00
30048	05/23/2009	1062	10081	\$399.00	\$349.00	\$50.00
30030	12/27/2007			\$2,490.04	\$1,751.00	\$39.44
30003	01/31/2007	1003		\$2,788.14	\$458.90	\$2,400.00

Contact Us

Sales and Free Consulting Inquiries

Phone: 415.668.1100
e-mail: sales@appfinity.com

General Information

e-mail: info@appfinity.com
www.appfinity.com

Make a Payment

Credit Card Type: ▼

Card Holder Name:

Credit Card #:

Security Code:

Receive Payment Report Email Address:

Expiration Date: ▼

Note:

Invoice #	Invoice Date	Due Date	P.O. #	Invoice Amount	Balance Due	Payment
30048	05/23/2009	06/22/2009	10081	\$798.00	\$50.00	<input type="text" value="50.00"/>
30050	06/06/2009	07/06/2009	AD12345	\$798.00	\$300.00	<input type="text" value="300.00"/>
30003	01/31/2007	03/02/2007		\$5,195.00	\$2,400.00	<input type="text" value="0.00"/>
30030	12/27/2007	01/26/2008		\$4,970.00	\$39.44	<input type="text" value="0.00"/>
					\$2,789.44	Total: \$350.00

Visit our website at www.appfinity.com to get more information about the AppFinity Customer Portal System. To view a self-running demo, go to the **Online Demos** page of our website.