

Boardroom Solutions Inc

July 1, 2016

Going AMmobile

September Core
product Training –
Free?

Enhancement
Requests

Technical Tips

Subscription Information

Going AMmobile

Dear AccountMate Clients,

AMmobile is a native iPad application with a real-time interface to your AccountMate system and has broad functionality. Specifically noting how, for customer maintenance you can: manage customers, including addresses and contacts; view existing quotes, orders and invoices; and map customer addresses with turn-by-turn directions. For transactional functionality, you can: enter new quotes and sales orders - even specifying shipped quantities when entering orders and accepting credit card payments, then e-mailing copies of the orders and receipts. For inventory management, you can: view unit and multi-level pricing; view on-order, on-hand, booked and available quantities for each warehouse, even see details of the on-order and booked quantities.

The product has continued to improve with functionality added including the abilities to: create and manage tasks; create and manage leads & prospects; add/view/manage attachments on customers, inventory item, and transactions; view sales trends; view the AccountMate Executive Summary; and much more. View a complete functionality [here](http://www.ammobile.net/features/) < add link <http://www.ammobile.net/features/> >, and complete pricing [here](http://www.ammobile.net/pricing/) < add link <http://www.ammobile.net/pricing/> >.

AMmobile revolutionized how users interact with their AccountMate accounting and financial management systems, and has now matured into a product that's revolutionized entire businesses. Contact us to arrange a demo and discuss how we can revolutionize your business!

Regards,

Anna DeGeer
Boardroom Solutions Inc.
www.boardroomsolutionsinc.com
403-225-2474
858-232-8247

September 14-16 Product Training - You May Be Eligible to Attend for Free

AccountMate's Lifecycle Maintenance Plan includes the newly added benefit of one free admission per year (regularly \$2,000) to a product training class at AccountMate's headquarters in northern California. The upcoming End User Core Product Training on September 14-16 (Wednesday-Friday) is classroom training intended for first-time AccountMate users and existing users who need to brush up on the latest features. In addition to learning about the AccountMate/SQL V9 installation and implementation, attendees will also get familiar with the core financial modules' key features.

See the course description [here](#). <add link
http://www.accountmate.com/education/training_all.asp >

If You Could Change Something About AccountMate, What Would It Be?

AccountMate has a great tradition of incorporating a large number of new features and product enhancement requests from users into their new releases. Which makes a whole lot of sense when you think about it.

You can submit enhancement requests anytime via **Help > Enhancement Request** in your system. Or email them to us and we'll submit them on your behalf.

This year, **September 30 is the cut-off date** for wishlist enhancement requests to be received for consideration in the "Preview and Product Enhancement Prioritization" voting process. This process occurs at the SYNERGY 2016 conference in October, which is attended by AccountMate vertical solution providers and business partners.

There's no limit to the number of requests you can submit, so let yourself feel empowered to share your ideas and help shape the AccountMate you use every day. Anytime you catch yourself saying, "I sure wish there was an option here to do it this other way instead," or "Hmm, now there's a cool idea for a new feature that would be awfully handy," capture that thought and send it on in.

Technical Tips

Versions: AM9 for SQL, Express, and LAN
AM8 for SQL, Express, and LAN
AM7 for LAN

Modules: PO, IC

Q: *Is it possible to add a new bin record to the MAIN warehouse though the Inventory Control (IC) module is not activated? If yes, how can I do so?*

A: *Yes; AccountMate allows you to add a bin record to the MAIN warehouse record though the IC module is not activated. You can use any of the Create Purchase Order functions (e.g., **Create Purchase Order by Vendor**) to do it. Simply click the underlined Warehouse field label in the **Create Purchase Order by Vendor ► Information** tab. The same procedure also applies to the other Create Purchase Order functions.*

■ ■ ■

Versions: AM9 for SQL and Express
AM8 for SQL, Express, and LAN
AM7 for LAN

Modules: AR and BR

Q: *I just started using the Bank Reconciliation module. When I attempt to reconcile my bank account I don't see any deposits to reconcile. What did I miss?*

A: *In order to see deposits in the Bank Reconciliation Module you must create deposit records for your cash receipts in the Account Receivable Module.*

■ ■ ■

Versions: AM9 for SQL and Express
AM8 for SQL and Express

Modules: SO, AR, PO, IC, MI, RA

TIP: The **Inventory Maintenance ► Settings (1) ► Minimum Price Type** area will be enabled if the Pricing Control module is activated in the AccountMate Administrator program. Once enabled, you can choose among the **Percentage Above Cost, Fixed Amt Above Cost or Fixed Amount** type to set the minimum price of an inventory item.



Versions:

AM 9 for SQL and Express
AM 8 for SQL, Express and LAN
AM 7 for LAN

Module: AR

Q: How do I assign a single customer number to handle payments for several related companies?

A: The AccountMate National Account Management feature will provide the capability to assign a "parent" customer number that will serve as the "pay-or" for invoices created for customers to which the "parent" customer number is assigned. Assign the desired Parent Account # value in the **Customer Maintenance > Settings tab > National Account Management Area > Parent Account #** field.

Subscription Information

If there is someone else in your office who would like to receive this NewsLine, please email subscriptions@boardroomsolutionsinc.com

If you would like to discontinue your subscription to this NewsLine, please let us know via email.

Anna DeGeer
Boardroom Solutions Inc.
www.boardroomsolutionsinc.com
403-225-2474