



# Make sales simple with Accredo

Four ways Accredo's integrated accounting functionality can simplify the sales process

# Make sales simple with Accredo

Sales are the lifeblood of all growing organisations. But as every New Zealand SME knows keeping them pumping is not that simple. Any number of external factors – new competitors, economic slowdowns, supplier issues – can negatively impact your sales success. For that reason it is vital to have tight oversight over elements of the sales cycle that you control.



Accredo is an accounting solution that helps support your sales efforts by making your everyday business easier to undertake. It gives you the flexibility to customise your sales and invoicing processes, so they work best for you and – more importantly – for each of your customers.

## **Automate, facilitate...celebrate**

Accredo facilitates sales success by providing mobile functionality and automation tools that make it easy for you to keep customers satisfied, while reducing time-consuming drudgery. Accredo's sales functionality helps eliminate the potential for human errors – mistakes that can be the difference between a one-off sale to a disgruntled customer or profitable repeat business to a satisfied one.

Think of your sales process as a timeline. By reducing that timeline and streamlining your entire procedure for processing, invoicing, and collecting payment for an order, you'll speed up cash flow, cut costs, and serve your customers better in the long run.

If your accounting system is efficient, it will let you do business on the spot. And that is a recipe for success. Whether it's creating quotes, querying inventory to see if items are in stock, ensuring your customer gets the deal they are entitled to, or customising information on an invoice, Accredo can do it all.

# 1 Go mobile for instant customer satisfaction



We know the quicker and more accurately you serve your customer the greater chance you have of sales success. You shouldn't have to take an order back to the office or wait for someone else to enter data before you can process the sale. A streamlined sales process is a successful one and that is how we have designed our mobile invoicing app.

**Do it on the spot:** Available on Android and iOS platforms our mobile sales app lets you enter transactions on the move in real time, so you can invoice on the spot wherever the need dictates. Raise invoices, quotes, duplicate invoices and credits – you can do it all right in front of the customer from your mobile device.

The top 25% of SMEs are seeing big gains from mobile. They're recording twice the revenue growth and up to eight times more jobs are being created.

**Empower your mobile workforce:** When your sales rep visits a retailer to restock items, for example, he or she can create an itemised invoice and email it to the retailer immediately. Time saved, and job done. You gain better business efficiency, remove double handling and shorten the order-to-fulfilment timeline.

**Access inventory remotely:** Product availability is of utmost importance when it comes to a customer deciding to purchase. Our mobile sales app lets you query inventory remotely to check whether the items ordered are available.

If the items requested aren't in stock, you can backorder them on the spot – so your customer knows the order is in the system. Remote reordering can save a sale – and gives your customer an instant guarantee that the goods will be sent immediately they are available.

**Quote it as you go:** Producing fast, accurate quotes lets your potential customer see exactly what products and services fit their needs and provides cost certainty. Doing this accurately is difficult if you maintain price lists in spreadsheets. Accredo ensures you don't make mistakes – such as quoting incorrect prices or mismatching your terms and conditions. The pricing you see through the Accredo mobile sales app is always up to date. Don't leave money on the table due to sales reps not having the correct information at their fingertips.

## 2 Give every customer the right price

Being able to sell on the move is a powerful differentiator, but if your customer demands the best prices, you need to deliver – reliably and repeatedly. Accredo's special pricing rules ensure your customers get the deal you promised them, and still protect your bottom line.

**Automatic pricing:** Once a special pricing rule is added to the system, it is automatically applied every time data entered from a mobile device or web service meets the rule's criteria. If, for example, you have established a rule in Accredo to apply a specific discount once a customer orders above a certain threshold, that rule will be applied and the correct price will automatically appear on your invoice instantly.

**Details matter:** No more looking up price lists and manually applying discounts or relying on staff to remember what products are on special this week. Accredo handles all these granular sales activities for you, ensuring the invoice you produce on the spot is accurate, transparent and meets all your obligations to the customer.

**Delegate, but stay in charge:** Your staff need the freedom to make deals with customers, but you need to know you can keep their promises and make a profit. Accredo's powerful scripting tools apply minimum profit margins to users, customers, products. Do the same with delivery times, or add reminders about delivery requirements for certain customers, waiting times for out of stock items, or planned price changes.

**Tell your customers:** With Accredo you can filter your price list to include only contract prices or include prices for all the products your customer buys. Put in today's date and fire the list off in an email; put in next month's date to let customers know about upcoming specials; or put in last month's date to confirm prices on an invoice or statement.



**"Accredo's Special Pricing module is second to none. We can customise pricing based on sales volumes, as well as a wide range of other criteria."**

GINA GOLDING  
SALES MANAGER  
PLASTER WAREHOUSE

# 3 Take control of your invoicing process

The secret to sales success is repeat business. One way of ensuring customers come back to you to purchase again and again is ensuring you have complete control over your invoicing, shipping and delivery processes.

**Give them what they want:** With Accredo's invoicing functionality you can produce invoices, quotations and packing slip documents exactly the way you want to, giving you the power to include all the information your customers demand to see on their documentation. Create detailed invoices for big customers or summarised ones for those who hate paperwork.

**Get paid on time:** Customers appreciate regular billing cycles, so once you have created your invoice, quotes, or packing slips you can send them off in batches at the end of each day, week or month. Use global narratives to quickly enter your payment terms, descriptions of work, and instructions or warnings.

Analysis undertaken by online payment service, Due.com, suggests these narratives help get your invoice paid up to twice as fast and that you are up to eight times more likely to be paid if you put a due date on your invoice.

**Turn it around fast:** Accredo makes it simple to complete the documentation that will ensure a successful sale. You can produce a quote from a template, accept the quote as an invoice, print the invoice as a packing slip, email the invoice to the customer, and print labels for packages quickly and easily all from the Accredo invoicing system.

**Deliver the goods:** Making a sale is great but delivering the goods is what keeps your customers coming back for more. Using Accredo's flexible address functionality you can quickly and efficiently deliver to the right place at the right time, every time. And on the shipper's grid, specify the courier or freight company used and the ticket number(s). If there is a problem, you can then click straight into their website to check the status of your parcels.

**Keep your finger on the pulse:** One way to improve cash flow is to not make one to a bad debtor. With Accredo you can apply credit limits to each customer, filter records regularly to find out who is behind with payments, then use Accredo's stop credit function to limit the damage.

82% of small business failures are due to issues with cash flow

# 4 Rev up your sales engine

Managing your customers successfully is key to future sales success. Knowing what they buy, when they want it and what other products or services they might also need, is essential to building a qualified sales funnel.

**Talk it up:** With Accredo you can analyse your invoicing data to improve customer contact and be more proactive about selling. Our powerful customer database allows you to track customer and sales information, and can be used to communicate proactively with your customers.

**Contact the right person:** Whether your reason for contact is sales or credit related, promotional or just social, Accredo allows you to quickly get in touch with the right person for every situation.

**Preserve your links:** Accredo makes it easy to keep track of communications and other information relating to individual customers – just create a hyperlink from the customer record to the file and you can quickly retrieve and view it at any time.

**Make it profitable for everyone:** Give sales people a stake in their reward by calculating commission as a percentage of either the total sale or the gross profit. Accredo makes it easy to monitor sales by sales person or area, and the built-in commission reporting options make monitoring and paying commission hassle-free.

**Save time with duplication:** Accredo's duplication tools not only save data re-entry time, they can be a useful tool for your sales team. Check items on previous invoices to obtain valuable feedback and generate repeat sales; duplicate invoices to retain correct product codes and other details. If prices change, automatically re-price before issuing and posting your invoice.



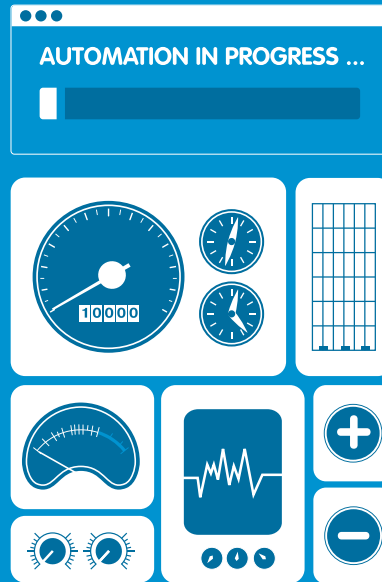
**"With Accredo I know by line item, by product and by company exactly what the sales turnover for our sales representatives is on a daily, weekly or monthly basis."**

JIM DAVIS  
MANAGING DIRECTOR  
PHARMABROKER

**Did you know that you are three times more likely to get paid if you add your company logo to your invoice?**

Analysis undertaken by online payment service, Due.com, of over 250,000 invoices sent in one year.

# GET COMPLETE CONTROL



Companies can  
reduce invoice  
handling costs by  
53% on average  
by going digital

Institute of Finance and  
Management

## Did you know?

Accredo provides you with integration to a service that automates data extraction from scanned, photographed and digital documents. The technology is powered by the artificial intelligence tools of Xtracta and integration is available and ready to use. The service extracts data from received documents, such as supplier invoices, and makes it available for importing into the core Accredo accounting solution – saving you time and money.

For more information about how Accredo can help your business please contact **Kevin Carberry**.

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**Accredo**   
taking care of business