



EXO ClientConnect factsheet

MYOB EXO ClientConnect

CRM software for sales teams that operates within Microsoft Outlook®

The smarter way to access all your critical sales and contact information through Microsoft Outlook.



MYOB EXO ClientConnect is a powerful multi-user contact and sales management tool for medium-sized businesses looking for a CRM system for use within Microsoft Outlook. Effective team collaboration means your sales team can work together by sharing contact and opportunity data, plus you can integrate with your existing MYOB software* including MYOB EXO Business.

No need to learn another program

If you know Microsoft Outlook, you know MYOB EXO ClientConnect. MYOB EXO ClientConnect works within Microsoft Outlook, so it simply becomes a feature addition of your email program. Manage features from the Dashboard, conveniently located in your Outlook Folder List.

Advanced contact management

Organise and manage customers from one central location - including updating of contact and company records, history of contact information, activity tracking and sales automation.

Advanced user permissions

MYOB EXO ClientConnect allows you to establish a hierarchy so each manager can see the data for the teams they supervise, while executives can see an overall view of the whole company.

Sales automation and workflow

Sales automation and workflow helps your sales people to follow a consistent process to close more sales. Create drip marketing campaigns and send prebuilt email templates or assign tasks to specific individuals.

Customisable reporting

By using Management Dashboard, managers can review, in real time, their sales pipeline and forecasts. MYOB EXO ClientConnect also features 40+ predefined reports to track sales activities and key metrics that can also be customised to your own requirements.

Group Email Wizard

MYOB EXO ClientConnect lets you send personalised emails to groups of contacts and sales opportunities. Automate emails and appointments for improved customer communication and targeted marketing.

Remote Access

Access MYOB EXO ClientConnect data via your regular computer, through Terminal Server, or VPN or simply work offline and MYOB EXO ClientConnect will automatically re-synch when you return to the office.

Integration with MYOB business management software*

MYOB EXO ClientConnect allows you to create quotes and synchronise contacts with your existing MYOB software through Outlook. It also integrates with MYOB EXO Business allowing for synching of debtor, creditor, non-accounts and contact data.

Generate quotes in MYOB EXO ClientConnect which are then available in your MYOB software when you next log in. Quotes can then be easily converted to orders and invoices eliminating the need to rekey sales quotes into your accounting system.



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Subscription licence software

MYOB EXO ClientConnect is available by subscription only. Subscription licences provide a cost effective way to keep up to date with MYOB EXO ClientConnect, without the need to purchase ongoing upgrades.

As part of your 12 month subscription, you receive upgrades as they are released and can be assured that you have the necessary technical support should you require it. To continue using your software after 12 months, simply renew your subscription licence.

More information

Australia

Call 1300 555 110

Visit myob.com.au/exo

Email exo@myob.com.au

New Zealand

Call 0800 696 239

Visit myob.co.nz/exo

Email exo@myob.co.nz

*Australia: Integrates with MYOB Accounting (v18 and above), MYOB Accounting v18.5 (and above), MYOB Premier 12.5 (and above), MYOB Premier Enterprise 6.5 (and above) and MYOB EXO Business 7.2 (and above).

New Zealand: Integrates with MYOB Accounting (v18 and above), MYOB Accounting v18 (and above), MYOB Premier 12 (and above), MYOB Premier Enterprise 6 (and above) and MYOB EXO Business 7.2 (and above).

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