

MYOB ClientConnect

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

MYOB ClientConnect provides an easy-to-use CRM solution that's ideal for sole traders and small businesses looking for a contact and sales management tool for use within Microsoft Outlook®. Create and manage sales opportunities, organise documents and emails, and integrate with your existing MYOB software*.



No need to learn another program

If you know Microsoft Outlook, you know MYOB ClientConnect. MYOB 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.

Contact management

You can simply create and manage contacts as you've already been doing. Easily capture, track and find all correspondence with contacts. Sort contacts by categories or groups.

Organise documents and emails with ease

Organise contacts by categories or groups for more effective targeting. Track all incoming and outgoing emails to a contact, company or sales opportunity.

Send group emails to specified groups or categories. Quickly search all Outlook activities related to a contact, company or group of people.

ClientConnect Dashboard

Conveniently located in your Outlook Folder List. Simply create and manage tasks as you've already been doing.

Review daily tasks and appointments. See estimated revenue for 30, 60, 90 days. Get a quick overview of your sales pipeline.

Sales management

Create and track all sales opportunities from your Outlook inbox. MYOB ClientConnect creates contacts if they don't already exist in Outlook Contacts.

Create activity reports and sales funnel reports. Keep date and time stamp notes for contacts, companies and sales opportunities.

Integrate with existing MYOB software

MYOB ClientConnect seamlessly synchronises contacts with your existing MYOB software* through Outlook. No need to jump from program to program or deal with poor syncing schemes. Reduce the need for double entry of contact data; work faster with fewer mistakes.

Subscription licence software

MYOB ClientConnect is available by subscription only. Subscription licences provide a cost effective way to keep up to date with MYOB 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 you have the necessary technical support should you require it. To continue using your software after 12 months, simply renew your subscription licence.



Need advanced sales automation and reporting?

MYOB ClientConnect Plus is a comprehensive contact and sales management tool that adds powerful features like automated workflow activities, sales automation, additional filtering capabilities and customisable reports. You can generate quotes in MYOB ClientConnect Plus which are then available in your MYOB software* when you next log in.

Minimum System Requirements

- Windows® 2000, Windows XP, Windows Vista Microsoft Office XP, Microsoft Office 2003 or 2007 with Microsoft Outlook – latest service packs are recommended
- Pentium 1 GHz or higher
- 1 Gig RAM or higher
- 2 Gig of available hard disk space

Note that MYOB ClientConnect only works in the English version of Microsoft Windows.

For more information

Australia

Visit myob.com.au/product/clientconnect or call **1300 555 111**.

New Zealand

Visit myob.co.nz/product/clientconnect or call **0800 60 69 62**.

*Australia: MYOB Accounting (v18 and above), MYOB Accounting Plus (v18.5 and above), MYOB Premier (v12.5 and above) and MYOB Premier Enterprise (v6.5 and above).

New Zealand: MYOB Accounting (v18 and above), MYOB Accounting Plus (v18 and above), MYOB Premier (v12 and above) and MYOB Premier Enterprise (v6 and above).

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