

MYOB ClientConnect Plus

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

MYOB ClientConnect Plus provides an easy-to-use CRM solution that's ideal for sole traders and small businesses looking for a comprehensive contact and sales management tool for use within Microsoft Outlook®. Automate workflow activities, create customisable reports and integrate with your existing MYOB software*.



No need to learn another program

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

Email marketing

Create email marketing campaigns and attach documents and PDF files to emails. Emails are sent automatically to prospects and reminders are automatically generated for follow ups. Develop marketing campaigns for each of your target customers.

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

Sales automation

Set up pre-designed emails, tasks or appointment for specific contacts with the Sales Automation tool. Automatically send 30, 60 or 90 day follow up emails to customers.

Integrate with existing MYOB software

Reduce the need for double entry of quoting data; work faster with fewer mistakes. Generate quotes in MYOB ClientConnect Plus which are then available in your MYOB software* when you next log in. Quotes can then be easily converted to orders and invoices.

MYOB ClientConnect Plus seamlessly synchronises contacts with your existing MYOB software* through Outlook. No need to jump from program to program or deal with poor syncing schemes.

Customise sales reporting

Customise reports to fit your specific business requirements. Define your own Sales Stages. Create activity reports and sales funnel reports.

Set automatic 30, 60, or 90 day calendar or task reminders to stay on top of prospects.

Create and manage sales opportunities and contacts

Create and track all sales opportunities from your Outlook inbox. MYOB ClientConnect Plus creates contacts if they don't already exist in Outlook Contacts. You can simply create and manage contacts as you've already been doing. Easily capture, track and find all correspondence with contacts. Sort contacts or groups by categories or groups for more effective targeting.

Keep date and time stamp notes for contacts, companies and sales opportunities. Import contact lists from Microsoft Excel®.

Share sales opportunities

Share contact and opportunity information with your sales team when logged into a network. Review sales team pipeline and all notes, emails and access files associated with opportunities.



ClientConnect Plus 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.

Subscription licence software

MYOB ClientConnect Plus is available by subscription only. Subscription licences provide a cost effective way to keep up to date with MYOB ClientConnect Plus, 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.

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.

Need a team based solution?

MYOB EXO ClientConnect is a multi-user version tool for team environments. It has all the features of MYOB ClientConnect Plus, with the added benefit of optional integration with MYOB EXO Business.

For more information

Australia

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

New Zealand

Visit myob.co.nz/product/clientconnectplus 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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