

What is CRM & why would any business need it?

CRM is an acronym for Contact Relationship Management.

All the information relating to a customer forms the basis of a customer relationship package including information in your accounting system, email correspondence and other documents.

Today CRM is the term generally used to reference CRM software, this however is merely the tip of the iceberg. At its heart, CRM is much more than a technology product; CRM is about process – it is about how a business deals with its customers. A good CRM solution builds value by opening up vital communication channels and creating a common client-focused knowledgebase.



Overall, by effectively integrating your marketing, sales, and customer service functions, a good CRM system makes it easier for everyone inside your company to work together and share critical information that all comes together to keep your customers satisfied and loyal.

How can businesses benefit from CRM?

Provide a higher level of service.

By knowing more about your customers' needs your business is equipped with the knowledge required to respond to queries in a timely and professional manner.

Provide the right product to the right customer.

By keeping track of your customer's preferences you are given the advantage of knowing, or at least anticipating, what they want out of a given product or service.

Keep everyone in the business on the same page.

Having information stored in one centralized place means your business can take ownership of your employee's customer knowledge. This means your business will not suffer if an employee is out for the day or leaves the organisation.

Measure business performance accurately.

If everyone in your business is doing their job correctly and they're feeding the business's CRM database with the correct information then managers and business analysts can tap into an invaluable resource to analyse and report on how the business is performing. For example, you can analyse the rate of lead-to-customer conversions, why some prospects opt for a competitor's product, or how quick your staff responds to customer's enquiries.



Front to back office integration, 360° customer visibility and seamless data consistency throughout the business.

The new MYOB EXO addon for the ACT! Customer and Contact Manager offers larger organisations a more comprehensive workflow solution for streamlining sales, marketing and accounting information.

The Xact Link for MYOB EXO enables the front-office to back-office workflow that small to medium business owners have been asking for, using everyday business software they are familiar with – no need for expensive corporate solutions.

ACT! plus the MYOB EXO addon combines sales and marketing data about your prospects and customers with important account information – *live*. No synchronisation, no delays. The result is a centralised database that offers a complete view of your contacts, activities, sales opportunities and overall business performance.

Such intuitive integration eliminates errors, delays, manual intervention and additional paperwork typically associated with multiple databases, allowing your staff to focus on what is important – building relationships and getting results.

How your business can benefit

Eliminate dual entry of records. Immediately populate ACT! with established records from accounts using the Import Wizard, then create and update MYOB EXO contacts from existing ACT! records with the click of a button.

Streamline business processes and improve workflow between the sales team (front office) and the accounting team (back office) to enable your business to become more efficient and more responsive to your customers.

Close more sales and better serve your customers. By combining sales history and purchase preferences in one place you can get a better view of your customers preferences and requirements.

Give your marketing more meaning. Using the MYOB EXO link to ensure all your contacts are in one place means you can ensure all your contacts are reached. Plus, combining financial data from MYOB EXO with non-financial data from ACT! means you can implement highly targeted campaigns.

The Xact Link for ACT! and MYOB EXO is an ACT! plug-in.

When installed the link operates as a tab within the contact details view in ACT!

Update MYOB EXO account details directly from within ACT!

View live account summary details and customise the view to show relevant MYOB EXO fields

View current stock list and pricing according to relevant price rules when you raise or modify an opportunity or quote in ACT!

View MYOB EXO Quotes, invoices and Payments from within ACT!

SeqNo	StockCode	Description	Qty	Price	Discount	Total	BatchCode	AnalysisCode
178	ANTROLL01	ANTIROLL BARS	5	308.4	0	1542		

Define user permissions with the Access Control feature

Try it for yourself

Talk to us to book a fully guided walk-through of ACT! and the MYOB EXO link OR Check out our online demo and see ACT! and MYOB EXO working together for yourself.

To book, visit our website:
www.xactsoftware.co.nz/demo

Key features of the Xact Link

1. Link one or multiple ACT! contacts to a debtor contact in MYOB EXO
2. Import existing MYOB EXO debtor contacts into ACT!
3. Create and update debtor accounts and debtor contacts from within ACT!
4. View account summary statistics and choose which MYOB EXO fields to display
5. View quotes, orders, invoices and payments from ACT!
6. Raise and edit quotes from ACT!
7. View line item stock details such as selling price, stock quantity and narratives on a per line item basis
8. Access the MYOB EXO stock list from the ACT! Opportunities view
9. Convert an ACT! Opportunity to a MYOB EXO Quote
10. Email or print any type of Order or Opportunity using highly customisable templates
11. Works with MYOB EXO pricing rules and policies
12. User access model to determine which features are available to each user

Product Roadmap:

Future development for the product is listed below; please note this is subject to change:

- Detailed view of Aged Receivables
- Full access to transactional process
- Item sales history
- Reporting functionality