

MYOB Exo

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# Customer Management



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# MYOB Exo

Providing greater insight into all areas of your operations, along with giving you more control and has the flexibility to grow with your business, MYOB Exo Business and MYOB Exo Employer Services can help run your business like never before.

**MYOB Exo provides the flexibility to build an entire business management solution that meets all your individual business needs. Here's how:**

- + Easy accounting and GL functions
- + Multiple locations / divisions / branches support
- + Management dashboards
- + Fully integrated Customer Relationship Management (CRM)
- + Advanced stock and foreign currency management

- + Extensive landed cost and shipment tracking
- + Integrated job and project costing functionality
- + Payroll, time and attendance and human resource management
- + Consolidation of financial transactions for all entries
- + Comprehensive and customisable accounting process flows and corresponding checklists.

# Customer Relationship Management (CRM)

A customer relationship management (CRM) tool to better manage sales and customer interactions.

MYOB Exo Business CRM manages all prospect and customer information derived from activities, tasks, emails, quotes and sales, in one centralised system, then allows you to use this information to build your business.

Eliminate the costly need of double-handling, inconsistencies or re-keying that arises using multiple systems. Plus, set varying levels of user access for higher security of data and information.

## Key features and benefits:

### Marketing campaign capability

Users can manage their marketing campaigns as a complete end to end process including tracking campaign costs and return on investment.

### Re-usable contact lists

Lists can be created using any segmentation requirements for use in marketing communications or bulk contact needs such as calling overdue debtors.

### Social CRM features

Social media integration capabilities deliver a true 360-degree view of your customers and prospects while enabling you to better engage with key stakeholders in a compelling manner.

### Live integration with Exo Finance

Enables access to real-time, accurate customer information including opportunities, orders and pricing arrangements – anywhere, any time.

### Contact management

A comprehensive view of all clients and prospects interactions with the company including their transaction history with a company.

### My Day tool

A customisable space that allows you to view all your activities including tasks, opportunities, pipeline, orders and sales performance.

### Sales performance analysis

Fully customisable tracking of sales performance.

### Real-time stock management

Offers live, accurate and up-to-date information, allowing for rapid response times to customer queries.

### Sales budgets

Ability to set realistic, and accurate sales budgets using historical sales data.

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# OnTheGo Mobile App

MYOB Exo OnTheGo is an application that has been designed specifically to meet the needs of the salesperson or account managers.

Staff can use the MYOB Exo OnTheGo application to securely connect and access the on-premise business information, enabling them to better manage the entire quote and order process.

MYOB Exo OnTheGo empowers sales teams to quickly make and convey key decisions, optimising the order process. Customers will receive their orders quicker with fewer mistakes – improving satisfaction.

## Key features and benefits:

- + Specifically designed for sales teams
- + You can access client information OnTheGo
- + Friendly design and simple operation
- + Access a complete end-to-end sales process – create customers and contacts and enter or amend orders all at the client's door
- + View real-time item details and inventory status at any time and confidently commit to delivery times
- + View outstanding customer invoices and invoice details to assist in pro-active account management
- + Your business data is safe and secure with password / pin code login to the application, and communication with your Exo Business system secured using encryption
- + Compatible with MYOB Exo Business 8.3 or newer
- + Pain free setup by downloading the app from the app store then configure it to MYOB Exo Business and you're away.

# We've been helping all kinds of retailers like Nood think bigger

These success stories make for rewarding reading, so invest in a few minutes to discover how we helped companies like yours.

## Background

New Objects of Desire (nood) sells furniture and homeware through 15 stores across New Zealand and a growing e-commerce website. It prides itself on offering a range of on-trend items, along with fantastic sales and offers for its customers. Loyalty member customers (“Noodists”) get even better deals on the four promotional “Noodist Days” that nood offers four times a year.

## The Problem

Nood has flourished by keeping a close eye on the performance of individual stores. Each store holds more than 7,000 units of stock at any time, with an equivalent amount stored in the company's warehouse. Exo delivers live information about inventory levels and the revenue stream from POS terminals at all the stores, and from the webstore. Customisation carried out by Focus enables data from Exo to be uploaded into Excel.

## The Solution

A daily sales report is generated from MYOB Exo into Excel and emailed across the company to show daily and month to date figures; then on Sunday another report is generated for the week and year to date.

MYOB Exo is central to nood's warehouse operations as well. Stock item definitions drive pick sheets for central warehouse, helping the team to know what to pick first (to meet pickup times), and which freight service to book different products on. The freight companies are linked to the warehouse via EDI.

## The Outcome

Nood orders well in advance for seasonal buying and can create pricing for sales at a very quick turnaround. The speed at which items can be on sale at specified times and dates is a major competitive advantage. The transparency of Exo, with a published database schema for most tables and the ability for authorised users to connect directly to view and update data, allow for quick updates and reporting with full trading history. “It's easy for me to get data for any report I want to compile, and the monthly report is all automated,” Blair says. “I have a 75-page monthly report that is generated in minutes.”

To find out more about MYOB Exo,  
talk to your MYOB Exo partner.

[myob.com/exo](https://myob.com/exo)

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success