Customer Management

MYOB Advanced Solutions

Contents

Advance your bigger business

MYOB Advanced Solutions are transforming the way larger Australian and New Zealand businesses work. This ncludes the MYOB Advanced Business and the Advanced Payroll suite. MYOB Advanced Business is an online business Enterprise Resource Management system (ERP) and MYOB Advanced Payroll is an online payroll system.

The Advanced Business and Payroll suites deliver an end-to-end business management system that provides ERP and payroll functionality on a single platform. The benefits of this unified system are realised when information flows between functions, reducing duplication of effort, manual data entry and real-time business insights.

MYOB Advanced Solutions will eliminate hardware costs, giving you a fully customisable platform for a convenient monthly price. And your online data is securely stored locally, giving you the flexibility and freedom to work the way you want.

Reporting & Dashboards

Monitor real-time trends in your organisation with comprehensive reporting tools that give you the confidence to accelerate your decision making.

Fully-integrated financial reporting

Make informed decisions faster with online reporting. Available in HTML, PDF, Excel and Word so you can quickly share your reports with others.
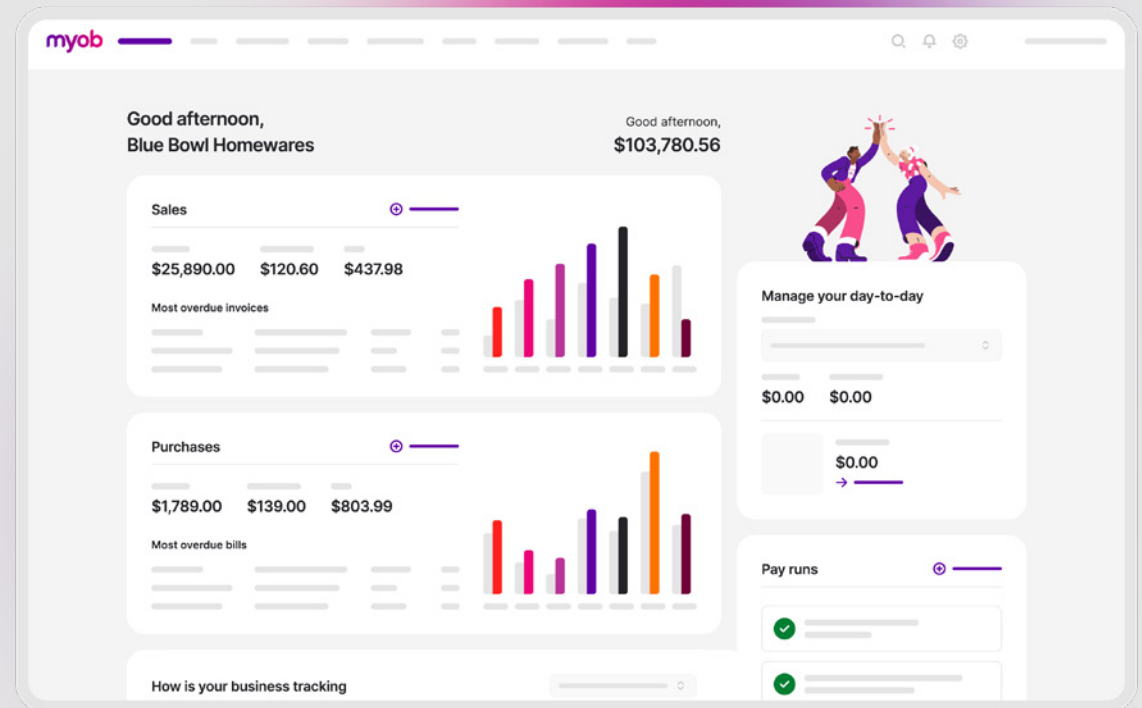
Interactive Dashboards

Displayed in an interactive visual format, dashboards provide you with customised views of key information in real time.

Personalised Reporting

Access customised views of information to suit your needs, with personally designed dashboards.

Instant Insight

Keep track of your progress with instant visibility over your KPI and score card dashboards.

Opportunity & Pipeline Management

Automate your sales process and improve the efficiency of your sales teams by providing them with the contacts, opportunities and activities that influence the sales decision.

Integrated Workflow

Streamline your order processing by automatically triggering status changes, updates, notifications and more.

Configurable Order Types

Make processing requirements easier with redefined order types and rules. Specify workflow scenarios and documents to be generated to keep your accounts receivable and inventory modules updated.

Flexible Promotion and Discounts

Enjoy the flexibility of managing complex pricing and discount policies with ease – even when they're in multiple currencies. Specify rules or allow the order management system to calculate and apply the best discounts combinations.

Integrated Marketing

Integrated Document management

Collate all your marketing materials in a central repository, including customer collateral, price lists, contract templates, email templates and more. You can even choose to apply access permissions at a document level to ensure security.

Lead and List management

Combine leads from your website, trade shows, purchased lists, or manual entry and automatically assign according to pre-set criteria. Duplicates can even be automatically noted and merged.

Email Marketing

Ensure your marketing collateral have consistent branding and messaging, with email templates that can be used to send newsletters, promotions, and other communications.

HubSpot integration

Enjoy automatic syncing and easy integration with the HubSpot system.

Service & Support Automation

Powerful Case Management

Take your customer to new heights. With real-time access to customer information directly from the CRM and ticketing system, and enhanced process workflows, you can ensure your team are constantly up-to-date.

Contract Management

Accelerate service support with customer cases linked directly to contracts and service plans. With service rates set per incident, hour, or prepaid, it's easy to ensure the proper support is provided and billed correctly.

Integrated Document Management

Control access to contracts, notes, emails and other communications all stored in an integrated content management system.

Want to hear about one of our MYOB Advanced Business success stories?

Invest a few minutes to discover how our CRM solutions has helped Martin Kellock Pots & Planters.

Background

Martin Kellock Pots & Planters has been in business for more than 20 years, supplying decorative pots and planters; initially to garden centres and more recently to the landscaping and design sectors, as well as large shopping centres. "We have thousands of items in stock at any time," explains Warehouse Manager, John Rose.

CRM needed for inventory control

Managing this large inventory became more of a challenge as Kellock's customer base grew. MYOB AccountRight wasn't equipped to handle the growing database of stock and customers; Kellock needed an integrated accounting, inventory management and CRM system.

A consultant was brought in to assess Kellock's business needs. Xero and Salesforce CRM were considered, but MYOB Advanced Business turned out to be the best solution.

The Solution

"MYOB Advanced Business had everything we wanted in one package," says John. "We saved on infrastructure costs and gained the peace of mind that comes from having a system fully delivered as a service."

Kellock now has visibility of all its orders available at a glance, and the benefits have also flowed on to its financial management. Remittances are sent by email, along with reminder notices for overdue invoices. This has saved large amounts of time and manual labour.

The Outcome

Inventory control and stock replenishment have been simplified by the elimination of manual tracking. Items can be moved between warehouses and invoices sent directly from wherever the goods are located. MYOB Advanced Business also enables the creation of mailing lists, so customers are always informed on what's available.

kellock
POTS & PLANTERS

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Get in touch with our team to talk more about MYOB Advanced Solutions.

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