MYOB EXO CRM Module

The MYOB EXO CRM Module is a customer relationship management (CRM) tool that is fully integrated with EXO Business. EXO CRM provides complete visibility and control over your end to end sales workflow and will help you manage customer interactions.

Full integration with EXO Business, means that all prospect and customer information from activities, tasks, emails and quotes through to sales histories are available through one centralised database – EXO CRM. Such comprehensive integration eliminates the need for any double-handling, inconsistencies or re-keying that inevitably arises through the use of multiple systems.

Flexible customisation allows you to set varying levels of access for users who require administrative rights as opposed to a user who simply needs access to customer information and to create quotes.
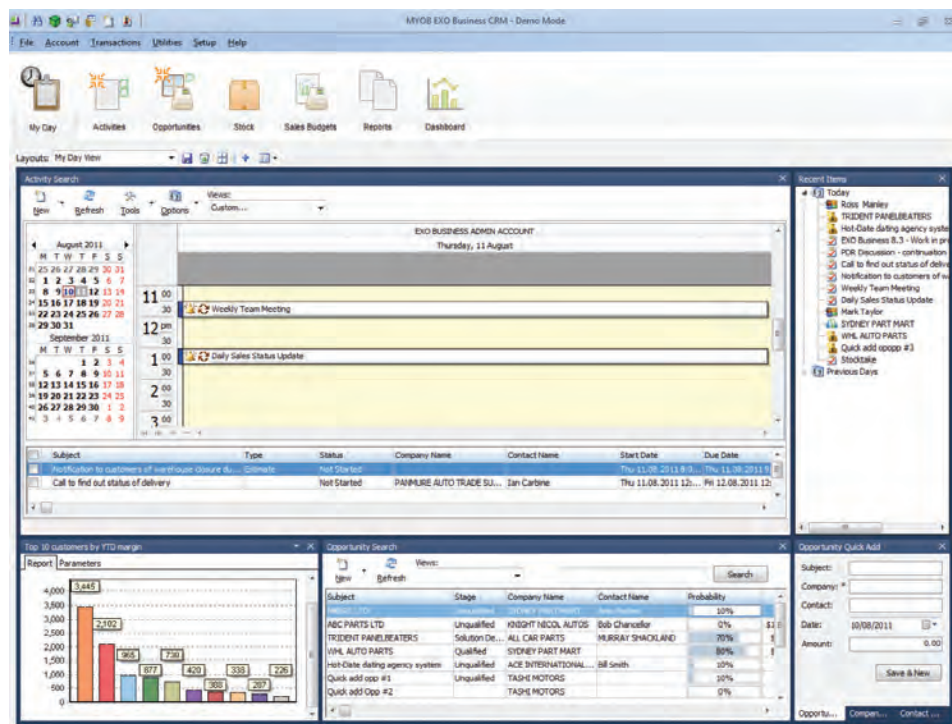

Figure 1 – My Day

EXO CRM has many key features that will enhance the operational efficiency of your business:

> Access to real-time, accurate customer information including opportunities, orders and pricing arrangements – anywhere, any time with thanks to live integration with EXO Business

> Comprehensive management of contacts including prospects and customers

> My Day tool – a customisable space that allows you to view all your activities including tasks, opportunities, pipeline, orders and sales performance

> Fully customisable tracking of sales performance

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

EXO
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Full integration with EXO Business

There are many benefits of EXO CRM being integrated with the EXO Business system:

> It enables a complete view of each prospect or customer across your entire organisation

> Provides you with live stock levels, anywhere, anytime – ensuring that customers can always be quoted accurately on stock availability and delivery timelines

> Current pricing is available when creating quotations to ensure that any pre-existing pricing agreements with customers are respected

> Data is live, not duplicated which ultimately means a reduction in error rate through the elimination of manual input or re-keying of data
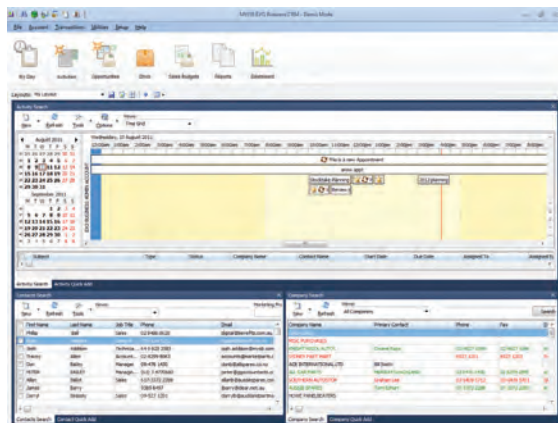

Figure 2 – Activities

Contact management

In EXO CRM you can view all interactions relating to each contact including activities, opportunities, orders and invoices. This information can also be shared across your company to promote a comprehensive, quality customer experience. And, as EXO CRM is integrated with Outlook®, you can have details from your contacts, tasks and appointments from EXO CRM available in Outlook®.

My Day tool to prioritise activities

My Day is a customisable space to display all your days' activities including:

> Due tasks

> Due opportunities

> Pipeline

> Orders

> Sales performance

With such a visual representation in a single screen that displays all information relevant to your activities, your day is easier to manage.

Sales opportunity management

EXO CRM enables you to capture opportunity details, including assigning a key contact, the source and value of the lead, the anticipated close date and probability of the sale. And, since EXO CRM is fully integrated, the prices and stock levels you are quoting your clients will be accurate and up to date. You will also have visibility on any pricing arrangements in place, and any related prices lists for each customer.

Once a sale has been confirmed, users can easily convert the opportunity to an order or job* that can then be processed through to invoice within the EXO suite. This straight through processing eliminates the need for any double-handling and re-keying of data resulting in faster, more accurate invoicing.
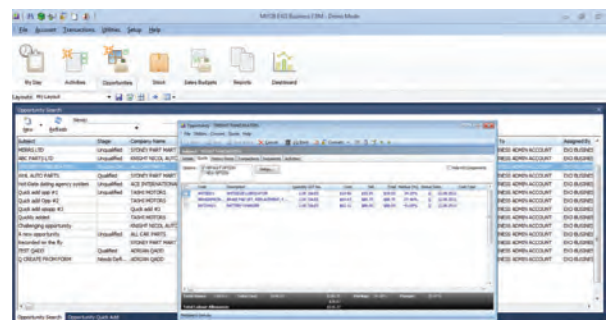

Figure 3 - Opportunity management

*only if EXO Job Costing module is installed

Real-time stock information

As EXO CRM is integrated with EXO Finance, the information that is fed through to the CRM interface is live. Which for stock, means you will always be accessing real-time information, allowing for rapid response times to customer queries.
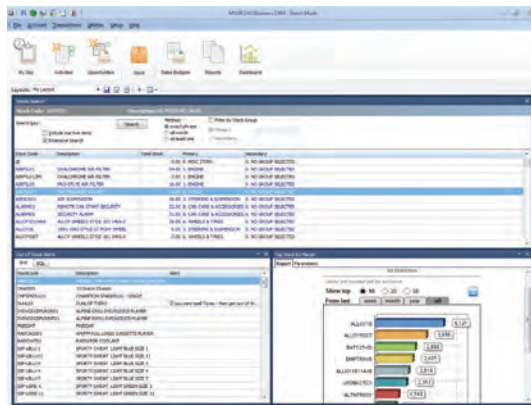

Figure 4 - Stock management

Sales vs. budgets

Sales performance tracking against budget is easy with EXO CRM, where you can slice and dice data as required to fully understand the driving forces of your results. In addition, since EXO CRM is fully integrated, you can utilise historical sales data as the basis for your budgeting giving you a reliable starting point to setting achievable sales budgets.

Additional customisable modules to enhance your business

If you are interested in a more customisable business management solution for your larger, more complex business and have some very specific requirements, we can help.

MYOB EXO Business contains a series of additional modules that can be purchased and customised to your requirements with the assistance of an MYOB Enterprise Solutions Partner at a very competitive rate.

Additional Modules to enhance your business system include:

> MYOB EXO Job Costing

> MYOB EXO Point of Sale

> MYOB EXO Intercompany

> MYOB EXO Fixed Assets

> MYOB EXO Payroll & Employer Services

A comprehensive business solution from MYOB

Take the hassle out of dealing with multiple software vendors and invest in end to end business management systems with MYOB that will work seamlessly together.

More information

To find out more or to organise a demonstration of MYOB EXO CRM Module, please contact MYOB Enterprise Solutions on the details below for details of your local MYOB Enterprise Solutions Partner.

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