

Tools to better manage and improve customer relationships.

Centralise all your customer data into one system

The information and task management tool helps you to better service your customers by consolidating all of your customer's critical information in one place, and displaying it in one simple screen.

Enhance customer service

Boost your customer service levels by setting up email communications such as thank you notes, keeping in touch messages and even birthday cards.

Track customer status and information

Improve turnaround times and generate more revenue by easily tracking customer project status and details, and viewing year-to-date revenue. You can view customer history and identify top customers.

More time for your customers

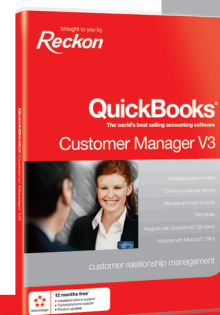
By launching pre-filled email and Microsoft® Word documents and any new transactions from the customer profile screen, you save time to allow for more interaction with your customers. Customise customer information using the print labels wizard before exporting data to review and print labels from Microsoft® Word.

QuickBooks QBⁱ series and Microsoft® Office integration & synchronisation

Save valuable time and money by importing customer data directly from Microsoft® Outlook, Outlook Express and QuickBooks. Also integrates with Microsoft® Word and Excel.

Easy to start-up and use

The simple to follow start-up wizard will have you up and running in about 30 minutes. Intuitive design, speedy navigation and help topics on every page make it incredibly easy to use.



QuickBooks® Customer Manager V3

System Requirements

- 350 MHz Intel Pentium (or equivalent) with 96 MB of RAM (1.0 GHz Intel Pentium IV or equivalent with 256 MB of RAM recommended)
- Windows 2000/XP/Vista™*
- 170 MB of disk space for Customer Manager installation
- 1 GB of disk space for QuickBooks QBi series installation**
- Internet Explorer 6.0 and 7.0 (requires 70 MB)
- At least 256 colour SVGA video
- 800 x 600 resolution with small fonts (1024 x 768 resolution recommended)
- Works with any printer supported by Windows 2000/XP/Vista™
- 8 x CD-ROM
- All online features/services require Internet access with at least a 56 Kbps modem (High speed Internet access recommended)

* Not available on 64 Bit Operating System

** QuickBooks QBⁱ series system requirements are higher than QuickBooks Customer Manager. Please ensure that you make a note of these prior to installing your software. The system requirements for QuickBooks QBⁱ series can be found in the QuickBooks QBⁱ series startup guide.

Integration Requirements

- Microsoft® .NET Framework CLR 1.1 (provided on CD, requires additional 23 MB of hard disk space)
- QuickBooks EasyStart, Accounting, Plus, Pro or Premier 2008/09 QBⁱ series and Quicken 2009
- Microsoft® Outlook 2000, 2002, 2003 and 2007
- Microsoft® Outlook Express 5.5 and 6.0
- Data from other applications may be imported using a CSV (comma separated value) or text format file