



Centralise all your customer data into one system

QuickBooks Customer Manager 2005/06 is an information and task management tool that will help you better serve your customers. It takes the pain out of tracking customer information in multiple systems because it consolidates all your client's critical information in one place and displays it on one, simple screen. When you click on a customer's name a complete overview of the customer interactions instantly appears: emails, phone calls, contact information, correspondence, recent QuickBooks transactions, linked documents, notes, to-do's, project information, and related contacts (like referrals or family members).



More time to give to your customers

By giving you more time to interact personally with your customers you can boost your service levels. QuickBooks Customer Manager helps you by launching pre-filled email and Microsoft® Word documents, as well as any new transactions directly from the customer profile screen. View year-to-date revenue or set up automated email communications such as thank you notes, keeping in touch messages, even birthday cards, so that you can improve your customer commitment.



Easy to follow start-up wizard and installation

Customer management has never been simpler - getting started is so QuickBooks.Easy. Import your data using the startup wizard and you can be up and running in about 30 minutes. QuickBooks Customer Manager features intuitive design and speedy navigation, as well as help topics on every screen. It is simple to use so you can make it part of your everyday business as quickly as possible.



Track customer status and information

Track the status of each customer from the first inquiry to the completed project or job. Information is now easy to file and find. With QuickBooks Customer Manager, everyone in the office can know exactly where a customer's project stands, with complete visibility to the projects history, contacts, tasks, appointments and even notes about the job. Get it running in your office to improve turnaround times and generate more revenue.



Outlook Express Integration & Synchronisation

The advanced integration and synchronisation features available in Customer Manager are now available for use with Microsoft Outlook Express. Save valuable time and money by importing your customer data directly from Outlook Express into Customer Manager. Enter any changes into Customer Manager and synchronise the updates into Outlook Express.



Export customer information to save you time

By exporting customer information from the Customer Manager Names List you can print mailing labels. Select and customise the information on the labels using the print labels wizard before exporting the data to review and print from Microsoft Word.



Multi user synchronisation

QuickBooks Customer Manager 2005/06 allows up to five installations to synchronise data via the "QuickBooks Customer Manager-to-QuickBooks Customer Manager Sync" feature. So you can share customer information among different computers in your business. Each user will need to buy and install a separate copy of QuickBooks Customer Manager software in order to use the QuickBooks Customer Manager-to-QuickBooks Customer Manager Sync feature.

QuickBooks® Customer Manager

2005/06



Shares data with Microsoft Outlook and QuickBooks 2005/06, and integrates with Word and Excel

Having customer data in multiple systems can lead to decreased levels of customer service, because customers have to wait while their information is located. QuickBooks Customer Manager integrates with QuickBooks Financial Software and Microsoft Outlook/Outlook Express to reduce duplicate data entry and give you a complete up to the minute view of your customers and suppliers; alternatively you can use QuickBooks Customer Manager as stand-alone software.

Other Features

- ✓ Store up to 10 different addresses, phone numbers, and email addresses per contact
- ✓ See pop-up alerts for important to-do's and appointments
- ✓ Attach files, such as letters, faxes, emails and spreadsheets to customer records
- ✓ Launch an email or Microsoft Word document directly from customer manager
- ✓ Integrate with QuickBooks and Microsoft Outlook so data doesn't need to be entered twice
- ✓ View customer history and identify top customers
- ✓ Set-up automated email communications
- ✓ Filter and sort contact lists, to-do lists, project lists or communication histories
- ✓ Customise an unlimited number of data fields, sort data, and store multiple forms of contact information
- ✓ Use the new global search option to search for any item within the Customer Manager database

If you are currently using QuickBooks Pro or Premier 2004 you will need to upgrade to QuickBooks 2005/06.

QuickBooks Customer Manager 2005/06 integrates with QuickBooks EasyStart, Accounting, Plus, Pro and Premier 2005/06

Want More?

QuickBooks Customer Manager works as a stand-alone solution or integrates with QuickBooks, Microsoft® Outlook and Microsoft® Outlook Express to make your business even more efficient. For up to 5-networked users, simply purchase a copy of QuickBooks Customer Manager for each user.

System Requirements

Processor:	IBM or compatible Pentium II 350 or comparable (Pentium III recommended)
Memory:	96 MB RAM (256 MB RAM recommended)
Operating System:	Windows 98/2000/XP
Hard Disk:	170 MB of disk space
Browser:	Internet Explorer 6.0 (provided with CD; requires 70 MB hard disk space)
CD-ROM Drive:	8X speed CD/DVD Drive
Monitor:	Super VGA (800x600) with 256 colours
Modem:	All online features/services require Internet access with at least a 56 Kbps modem (High speed Internet access recommended)
Framework:	Microsoft® .NET Framework CLR 1.1 (provided on CD; requires additional 23 MB of hard disk space)

Integration Requirements

- QuickBooks EasyStart, Accounting, Plus, Pro or QuickBooks Premier 2005/06.
- Microsoft Outlook 2000, 2002 and 2003.
- Microsoft Outlook Express 5.5 and 6.0
- Microsoft Office 2000 and XP
- Other application data may be imported using a CSV (comma separated value) or text format file.
- Additional software sold separately

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accounting software