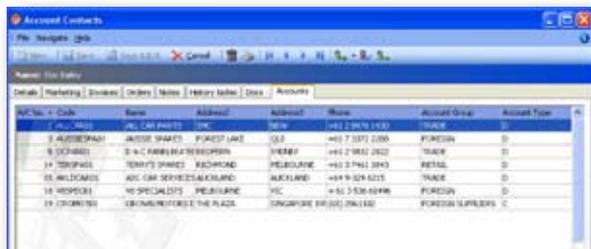# MYOB EXO Finance – Managing Relationships

Your business is built around relationships so MYOB EXO Finance allows you to store information on all the people your business interacts with from suppliers to customers to prospects to business advisors; it becomes the central hub to maintain all the relevant information.

Two levels of relationships

Within MYOB EXO Finance there are two levels at which to manage relationships, the business (accounts) & the individual (contacts). The business can be a customer, supplier, or what we refer to as a non-account. A non-account is a generic term for a business that you want to maintain a relationship with but have not yet engaged with at a transactional level. This may be a prospective customer, a potential supplier or it could be a business that you will never transaction with but need to maintain information so the relationship can be managed such as a business advisor. In addition to this you can then maintain information on individual contacts, these people can belong to a business or they can simply be a contact with no association. A business can have many contacts and a contact can have an association with many businesses.
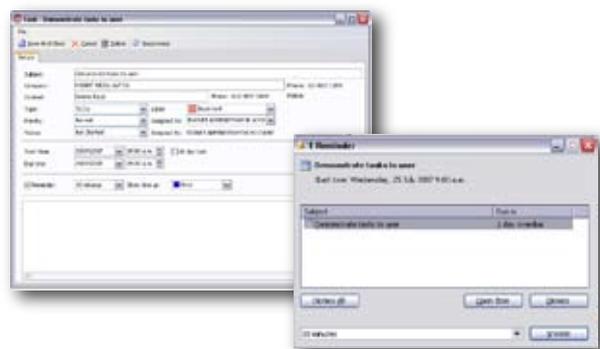

Tasks, scheduling & reminders

While maintaining information about your people is important, keeping track of your tasks & activities regarding interactions with customers are even more so. That's why MYOB EXO Finance comes standard with a task management system & scheduling tool.

Tasks can be created and assigned against a business or an individual (or both), it can then be assigned to a staff member and a due date set. The system then provides reminders via an alarm when the task becomes overdue.

Tasks can also be setup as recurring, priorities can be set & labels used to help categorises and identify tasks.
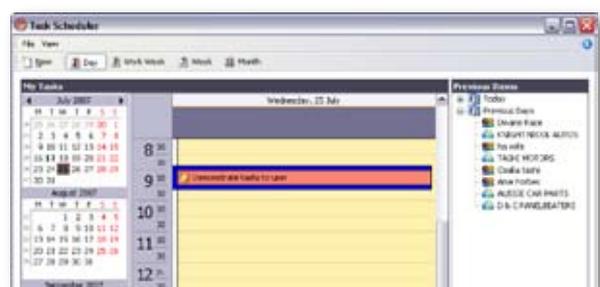
Managing your tasks can then be done from a familiar calendar interface. All your tasks will appear on the calendar view. This view can be set to show daily, weekly, monthly or custom durations depending on your requirements. Alternatively you can view your tasks from the customers master file.

Interfacing with MS Outlook

Users who also run Microsoft Outlook (with or without Exchange Server) may export or import tasks. A task in MYOB EXO Finance is mostly equivalent to an appointment in Outlook and should not be confused with Outlook's tasks.

Contact details can also be exported / synchronised with MS Outlook directly. In all case MYOB EXO Finance contact system must be the master system with it sending the data down into the individual users MS Outlook Contact database.

Marketing categories

Unlimited marketing classes allow you to classify your contacts ready for future marketing events. Whether it be your monthly newsletter, Christmas card list or a weekly email the distribution list can now be accessed directly from the system. Each marketing class provides you with a pre-defined distribution list which can be used for emailing or mail merges.

Extra fields

You can define additional fields to capture data specific to the relationships within your business. This is about you defining what data is useful to you and your business and where you want to capture it, is it on the individual or is it at the business/account level.

Document management

MYOB EXO Finance provides you with the ability to store documents associated with an individual or business within their master file. The document can either be stored physically in the database or simply be a link to the document stored on your local machine or server. This gives you and your staff a central place to have all information pertaining to the individual or business. Managing documents to do with each individual is now easy. All Documents produced by a computer can be stored right here against an individual's contact details.

Mail merge

Now you can have any number of customised documents that take your filtered list and produce a mail merged document. But MYOB EXO Finance's mail merge goes a whole lot further. Once the contact is identified in the merged document it can also retrieve debtor data specific to that contact. For example you might have a 60day debtor collection letter. Merge the names and address as defined above and let the merge document retrieve additional data directly from the MYOB EXO Finance data base about that contact. This very powerful merging facility is unique to MYOB EXO Finance.

Additional modules to enhance your business

If you are interested in a more customisable business management solution for your mid-sized business and have some very specific industry requirements, we can help. The MYOB EXO Business Suite contains a series of additional modules that can be purchased and customised to your requirements with the assistance of an MYOB Enterprise Partners 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

More information

To find out more about the MYOB EXO Business Suite please call the MYOB Sales team on 1300 555 110 or email us at esinfo.au@myob.com