

# QuickBooks® 2006/07 Customer Manager

## Features & Benefits

### Centralise all your customer data into one system

QuickBooks Customer Manager 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 customer'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 Dos, project information, and related contacts (like referrals or family members).

Name Profile	
Name	Bristol, Sonja
Show As	Bristol, Sonja
Groups	Customer
Settings	Show, Public
Company	Stadium
Job Title	
Phone: Work	0425 321 654
E-mail: Main	sonja@hotmail.c

### 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.

### 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 project's history, contacts, tasks, appointments and even notes about the job. Get it running in your office to improve turnaround times and generate more revenue.

Status	Type
In Progress	
Awarded	Contract
Closed	Charity

### Outlook Express integration & synchronisation

The advanced integration and synchronisation features in QuickBooks Customer Manager are 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. To make things even easier Customer Manager also integrates with Microsoft® Word, Outlook and Excel.

### 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.

<input checked="" type="checkbox"/> Prepare Mailing Labels	<input type="checkbox"/> Select recipients, select label type, format and
<input type="checkbox"/> Prepare Letters	<input type="checkbox"/> Select recipients, select letter type and print le
<input type="checkbox"/> Modify Letter Templates	<input type="checkbox"/> View, edit and create letter templates

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### Integration with QuickBooks 2005/06 and 2006/07

QuickBooks Customer Manager is a great standalone customer relationship management tool. To help you run your business better it integrates with QuickBooks 2005/06 and QuickBooks 2006/07. This will help reduce duplicate data entry and will give you a complete up to the minute view of your customers and suppliers.

### New Enhancements

- Customer Manager's new design makes it easier to resolve conflicts when importing text or CSV files or synchronising with another application such as QuickBooks or Outlook Express. It enables you to identify the application that created the source information.
- Customer Manager also separates information in conflicting records so you can see the conflicting elements against the non-conflicting elements. This makes it easier to resolve the conflict.
- You can now choose to create one record from a conflict or keep both records in Customer Manager separately. This second option is great if the two conflicting records relate to two different people and you don't wish to merge the details. Both records will exist in Customer Manager and the other application.
- Skip or delay resolving an individual conflict to the next synchronisation when you are synchronising with QuickBooks, Microsoft Outlook, or Outlook Express.
- Resolve all conflicts during a synchronisation process automatically by getting Customer Manager to keep data from a specific application. This feature is only available as a choice whilst synchronising data. You cannot set a preference that has Customer Manager apply the feature automatically to all synchronisation processes.

### Want More?

You can set up QuickBooks Customer Manager on a network so that data can be shared among up to 5 networked users. Simply purchase a copy of QuickBooks Customer Manager for each user. Ask your supplier or contact Quicken on 1300 QUICKEN (784 253).

### System Requirements

Processor:	350 MHz Intel Pentium (or equivalent) (1GHz Intel Pentium IV recommended)
Memory:	96 MB of RAM (256 MB recommended)
Operating System:	Microsoft Windows 98SE/2000/XP (Windows 2000/XP recommended)
Hard Disk:	170 MB of disk space for Installation
Browser:	Internet Explorer 6.0 (requires 70 MB hard disk space)
CD-ROM Drive:	8x CD-ROM
Printer:	Works with any printer supported by Windows 98SE/2000/XP
Monitor:	At least 256 colour SVGA video; 800 x 600 resolution with small fonts
Modem:	All online features/services require Internet access with at least a 56 Kbps modem

### Integration Requirements

- Microsoft® .NET Framework CLR 1.1 (provided on CD, requires additional 23 MB of hard disk space)
- QuickBooks EasyStart, QuickBooks Accounting, QuickBooks Plus, QuickBooks Pro or QuickBooks Premier (2005/06 or 2006/07)
- Microsoft® Outlook 2000, 2002 or 2003
- Microsoft® Outlook Express 5.5 or 6.0
- Other applications may be imported using a CSV (comma separated value) or text format file