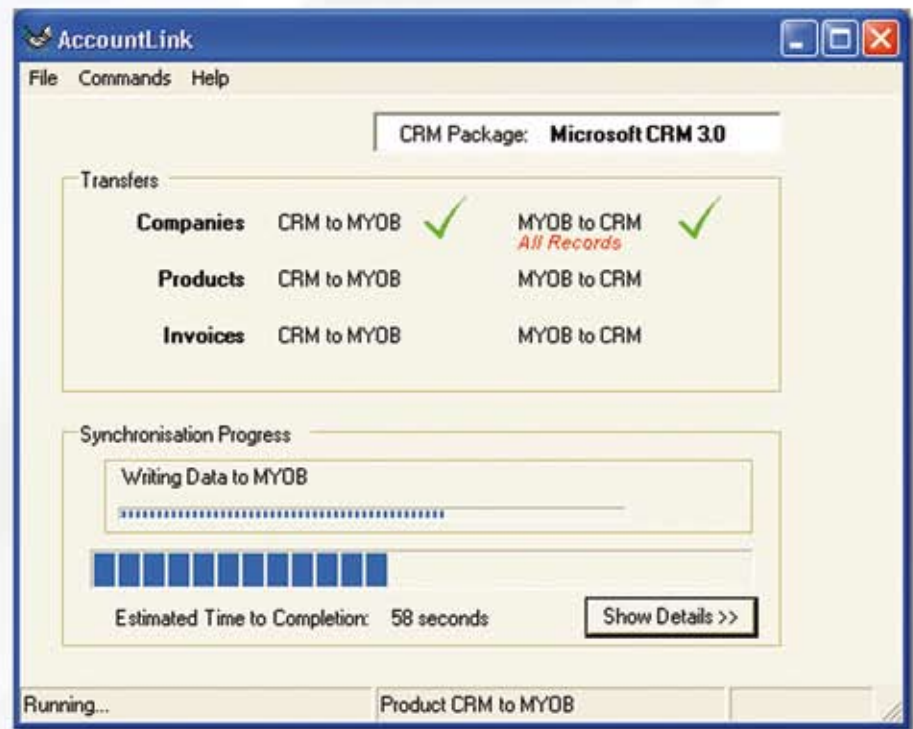# AccountLink

Connect your CRM System to MYOB

Many MYOB customers are recognising the benefits of a true Customer Relationship Management (CRM) system, and need to integrate their MYOB accounting system. AccountLink complements leading CRM solutions, by providing access to read and bi-directionally synchronise your MYOB data.

Changes entered in the CRM system are recognised by AccountLink and the corresponding record in MYOB is updated or added. You can also work in your MYOB system, and AccountLink will track the changes and synchronise the CRM System. With AccountLink, all of your staff have up to date information, and double entry of data is eliminated.

- Bi-directional "bridge" to connect your CRM system to MYOB
- Synchronisation of Customers, Items and Invoices, with MYOB
- Full control over information transferred
- Works with MYOB Premier and MYOB Accounting Plus, and popular CRM packages
- Easy to use, installed & configured in minutes

Typical Applications

A customer service representative is advised of a new client address. This is updated in the CRM System and AccountLink automatically handles the changes in MYOB.

A salesperson creates a quote in the CRM System. The client decides to go ahead, the stock is on hand and the salesperson can immediately convert the quote to an invoice, print and send with the goods. AccountLink takes care of entering the invoice into MYOB.

At the same time, accounting staff are also issuing invoices directly from MYOB. AccountLink is updating the CRM System with this information, so a sales person can see exactly what has been sold to their client, as well as account balance and any amount overdue for payment.

www.aus.com.au/accountlink

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AccountLink Capabilities

Data Managed in AccountLink v4.1

Customer Cards
Multiple addresses
Phone numbers, email, web site
Sales history, account balance,
credit limit, amount overdue
Account number, ABN
Primary contact
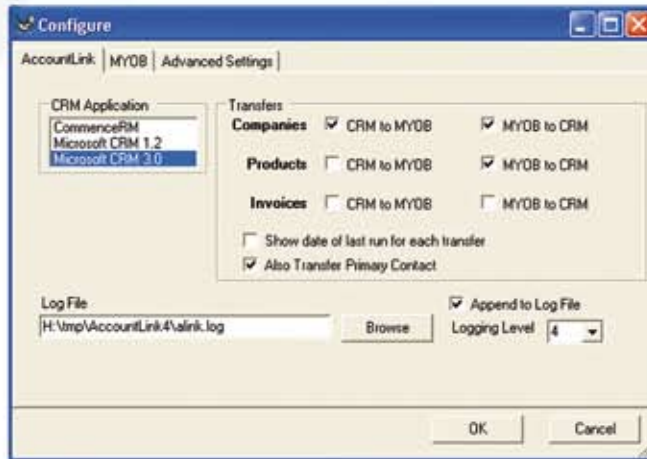Notes / description

Items
Product description
Pricing information and tax
Accounts used, tax inclusive
Quantity on hand
Unit of measure
Standard cost
Last purchase price

Invoices
Item invoices
Quantity
Part number
Description
Price
Discount
Line & total tax

Synchronisation Options
Customers CRM to MYOB
Customers MYOB to CRM
Products CRM to MYOB
Products MYOB to CRM
Invoices CRM to MYOB
Invoices MYOB to CRM

Configuration
Log file settings
CRM package selection
CRM specific configuration
(e.g. login, field mapping)
Transfer all records
Transfer selected records
All settings saved automatically
Backup & restore settings
Disable contact transfer
Intelligent duplicate management
Login authentication

MYOB Settings
MYOB Version
Company File selection
Login & Password

CRM Systems
Microsoft CRM 3.0
More CRM systems coming soon
AccountLink uses the latest MYOB
ODBC drivers

System Requirements
PC with Pentium® processor (or
equivalent) @ 200MHz or better
At least 256MB RAM
Hard disk with at least 200MB free
Windows 2000, Windows XP,
Windows Vista or Windows Server 2003
MYOB Premier v10 or MYOB
Accounting Plus v16 (or later)

Try AccountLink Today!
You can download a FREE evaluation copy from our web site at
www.aus.com.au/accountlink
or call us on
02 9878 4777