



TRAINING NOTES

GETTING MYOB SOFTWARE AND **youGROW** TO WORK TOGETHER

As you're probably aware, the great thing about **youGROW** is the way that it integrates with MYOB software. What this means is that you can take advantage of all the information that you already have in your MYOB company file, such as customer details and sales history, and use this information when you're working with **youGROW**.

The concept is simple and most people are quick to learn how to get **youGROW** and MYOB to 'talk' to one another, so that as soon as a new customer is added to MYOB, all their information appears in your **youGROW** Outlook Contacts folder. Similarly, as soon as a new sale is made in MYOB, this information also appears in Outlook.

However, what many business people don't realise is that in order to make the most of this integration, they need to do a little more work behind the scenes in their MYOB company file. MYOB software has lots of features that enable you to segment your customers into different groups, or organise your stock items into different categories. If you can take advantage of these features in MYOB, then the information that flows into **youGROW** becomes a whole lot more powerful.

What this document does is gives you a few ideas about how you can work MYOB a little harder, so that the information that flows into **youGROW** is even better.

Why should I bother organising my customers into groups?

No matter what kind of business you run, regardless of how large or small, you can always benefit from analysing your customers and organising them into groups. Here are some examples of the kind of groups you could use:

- **Referral source.** You could organise customers by how they find out about you (for example, from radio, newspapers or word of mouth)
- **Demographics.** Male versus female; different age groups (25-39, 40-49, 50-59, etc); income bracket (\$20,000+, \$30,000+, \$40,000+, etc).
- **Specific groups.** A gym might group members according to the classes they attend. A sports club might group members according to grades. A community college could group students according to subjects they enrol in.
- **Customer contact requests.** You can organise customers according to what information they request (such as info regarding particular products or particular events only).

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- **Location or Sales Territory.** Grouping customers or clients in this way is ideal for finding all clients assigned to a particular salesperson. (Bear in mind that with **youGROW**, it's easy to find all customers in a particular state or states, postcode, country or suburb.)
- **Business Type.** For example, Corporate, Government or Private, or the specific type of business – eg, retailer, wholesaler, IT, service organisation. etc
- **Interests.** If you sponsor various types of events, such as football, cricket or theatre, you can note what areas your clients are most interested in.
- **Newsletters:** You can log whether clients have specifically stated they want to receive newsletters from you.
- **Proposal/quote prepared – yes/no.** This is excellent for tracking prospects at proposal stage during the sales cycle. **youGROW** can easily find all prospects — those who have not bought anything from you — based on the date in which they were entered into MYOB software. However, setting up a custom list to track where customers are in the sales cycle is another strategy that works really well.



Normally, if a client doesn't wish to be contacted via email, then your best approach is simply not to collect their email address. In **youGROW**, it's very easy to set up a filter or standard view to find clients with no email address.

How do I get MYOB software to organise my customers into the groups I want?

MYOB software makes it very easy to organise customers into groups. There are three methods: Custom Lists; Custom Fields and Identifiers. Each *type* of method has its own benefits.

To experiment with this feature, double-click on any customer card and click the Card Details tab. On the left of this window you'll see three lists: Custom List #1, Custom List #2 and Custom List #3. In other words, you're able to organise your customers according to at least three different sets of criteria.

The easiest way to see how custom lists will work for you is to give it a shot. Here's what to do:

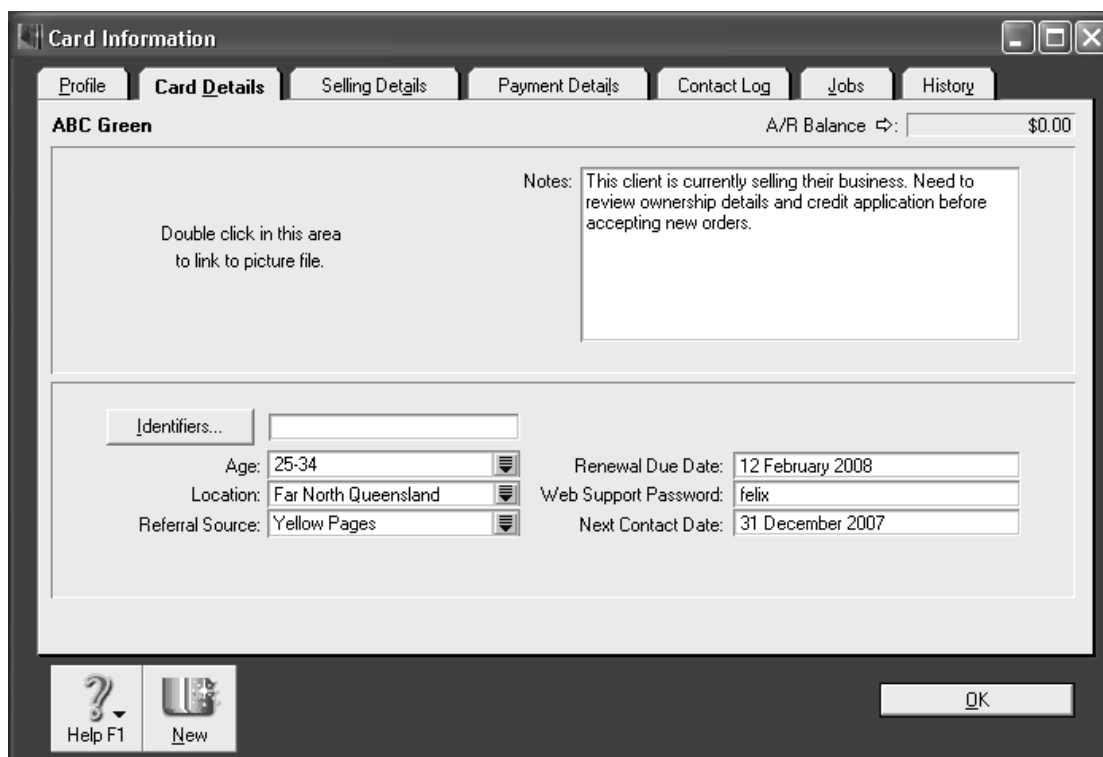
1. **Decide how to group your customers or clients.** Every business will do this differently, but the previous page of this guide gives you some idea of possible grouping strategies.
2. **Set up custom list labels for each customer group.** Go to your Lists menu, click Custom List & Field Names, and then click Customers. Change the title of Custom List #1 (and Custom List #2 and #3 if

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desired) to indicate the way you're going to group customers (for example, by changing the name of Custom List #1 to 'Location').

3. **Set up lists for each customer group.** From the main menu, choose Lists, then Custom Lists and then Customers. Now decide what you want to appear under each custom list. For example, if you want to group customers by state, you'd enter 'NSW, Queensland, Victoria, etc' in the list for Location.

That's all there is to it! The screenshot below shows how this could work for example, but of course, you can apply these principles in many different ways.



Using MYOB's versatile custom lists feature to segment your customers into groups



You'll find that when **youGROW** synchronises the data from your MYOB company file, complete with customer grouping information, you can segment your customer data based on almost limitless criteria.

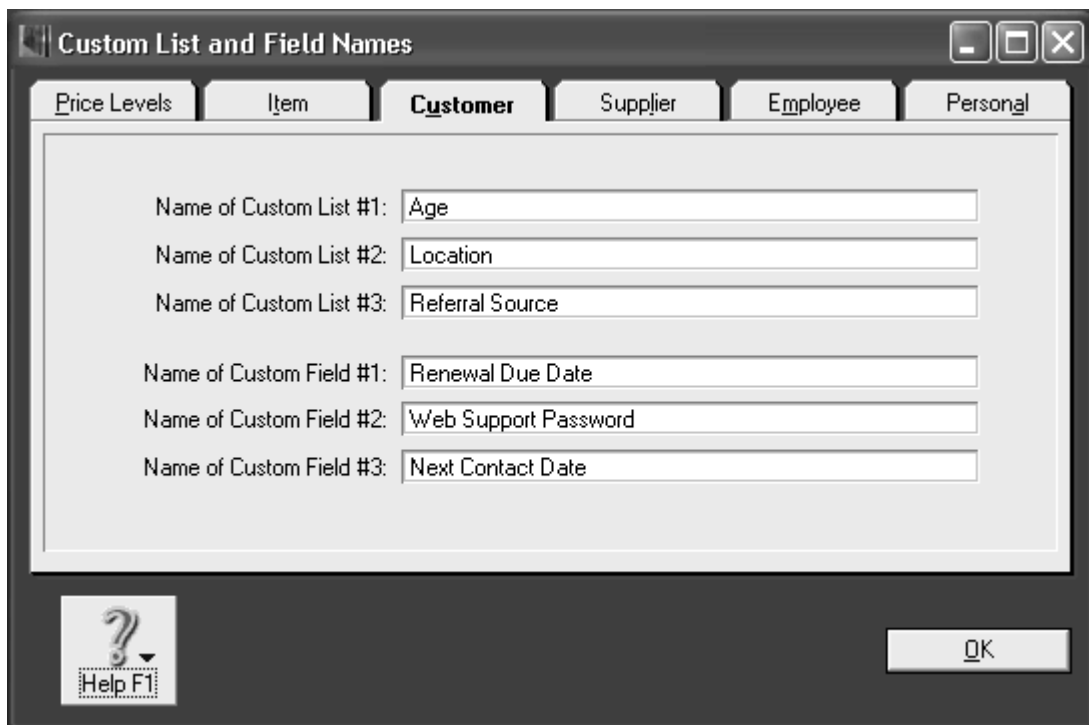
How are custom fields different from custom lists and when should I use them?

If you go to the Card Details tab of any customer card in MYOB, you'll see that not only are there three Custom Lists available for each customer, but there are three Custom Fields available also.

Because Custom Fields are freeform (i.e. not selected from a list), they're the ideal place to include text-based or date-based information about customers. Examples of when you might use Custom Fields could include:

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- **Username & Password.** For example, access to web based information/ordering systems you may have set up for clients to access.
- **Renewal Date.** For example, the date a customer's support contract or membership expires. If using as a date field, you're best to type the date out in full, i.e. '12 December 2007'. This way, **youGROW** can easily find everyone whose membership/payments expire in 'December 2007'.
- **Next Contact Date.** Maybe the client has indicated they will be ready to buy another product at a certain time frame. Again, typing out the date in full means that **youGROW** can perform fully flexible searches.



Custom List and Field Names

Price Levels | Item | **Customer** | Supplier | Employee | Personal

Name of Custom List #1: Age

Name of Custom List #2: Location

Name of Custom List #3: Referral Source

Name of Custom Field #1: Renewal Due Date

Name of Custom Field #2: Web Support Password

Name of Custom Field #3: Next Contact Date

Help F1

OK

This screenshot shows how you set up labels for Custom Lists or Custom Fields



The real benefit of using Custom Lists (otherwise known as 'drop down lists'), rather than Custom Fields, is that because Custom Lists force you to select information from a list, you avoid typing errors. This makes it easier to search on known criteria.

Where do identifiers fit into the picture?

People who've been using MYOB software for a few years (before the Custom List feature arrived on the scene) may already organise customers into groups by using Identifiers. If you want to continue using Identifiers, that's not a problem, as **youGROW** synchronises this information with Outlook just fine.



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However, you will find that Custom Lists are an easier way of organising customers into groups, and there are a wider range of reports available within MYOB software that can be filtered using Custom List criteria.

However, the unique benefit of Identifiers, and that you can have *up to 10 identifiers against any one customer card* – so they are ideal for where customers can fit multiple categories.

Should I track Referral Source by each sale or by each customer?

The correct answer to this question depends on the nature of your business.

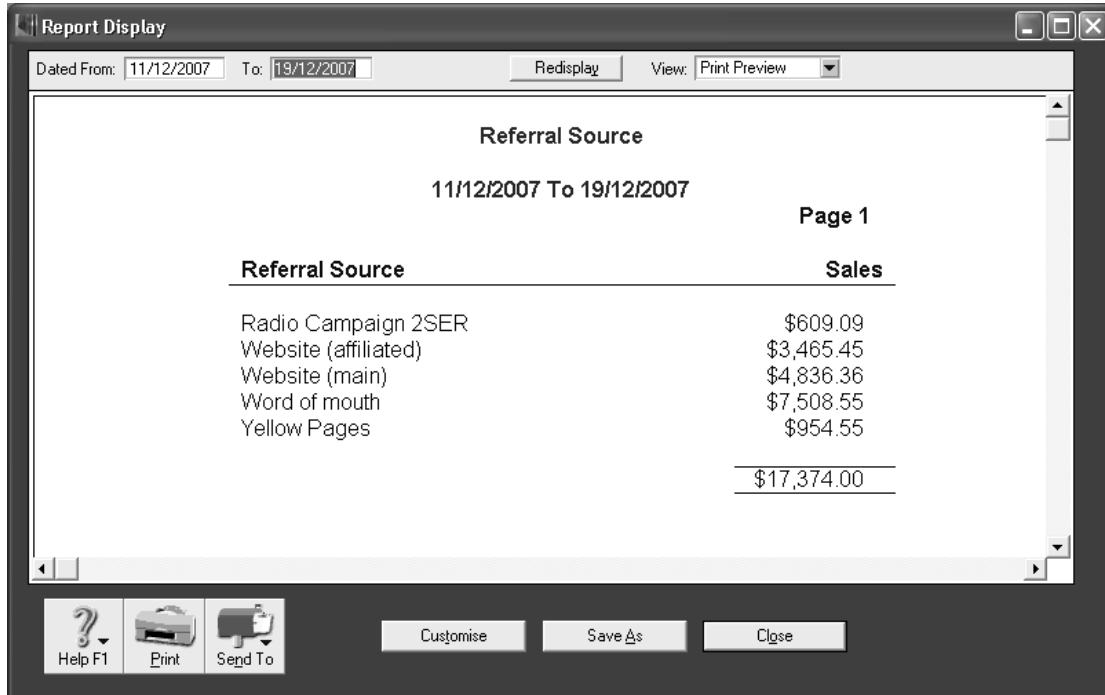
If the Referral Source for your customers (that is, how the customer heard about your business) tends to stay the same for every sale (in other words, the customer first heard about you through the Yellow Pages and that continues to be relevant) then you should set up a Custom List called Referral Source and include all referral sources in this list.

If the Referral Source for your customers tends to change with every sale (maybe customers tend to response to different marketing campaigns), then you need to track the Referral Source in every sale transaction that you make (there's a field called Referral Source in the bottom left of every sales window).

Regardless of whether you record your Referral Source as a Custom List for each customer, or in every sale, **youGROW** makes sure that this information will flow through to Outlook. This is a very powerful tool:

- In MYOB software you can generate sales reports according to how customers heard about you, thereby assessing how effective your different marketing methods or campaigns have been.
- As this information is also available to you through **youGROW**, you can easily find and communicate with all clients who have bought as a result of a particular campaign, to send them a thank you letter, or a follow up as to another relevant product or service.
- Using **youGROW** or MYOB software, you can print mailing labels according to how customers heard about you. For example, customers who've responded to a mail order marketing campaign in the past are more likely to respond to a mail order campaign in the future, meaning that you can target your marketing dollars in a very specific manner.

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Report Display

Dated From: 11/12/2007 To: 19/12/2007 Redisplay View: Print Preview

Referral Source
11/12/2007 To 19/12/2007

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Referral Source	Sales
Radio Campaign 2SER	\$609.09
Website (affiliated)	\$3,465.45
Website (main)	\$4,836.36
Word of mouth	\$7,508.55
Yellow Pages	\$954.55
	\$17,374.00

Help F1 Print Send To Customise Save As Close

Accurate Referral Source reporting enables you to assess the success of different marketing campaigns or methods

Is it a good idea to organise customers into groups according to how much they've bought?

No, this isn't a very efficient use of your time. Because **youGROW** sends all your sales information out of MYOB into Outlook automatically, you already have this information sitting in Outlook, ready to go. If you want to generate a list of your top 100 customers, based on how much each one has purchased in the last six months, then you can use **youGROW** to do so. It would be duplication — and therefore a waste of time — to create special customer categories in MYOB for this kind of analysis.



The custom list feature in MYOB software is best for storing information that relates to the ways you categorise customers, and is not an appropriate place to store information related to individual sales made to customers.

I want to store notes about my customers. Should I do this in MYOB or Outlook?

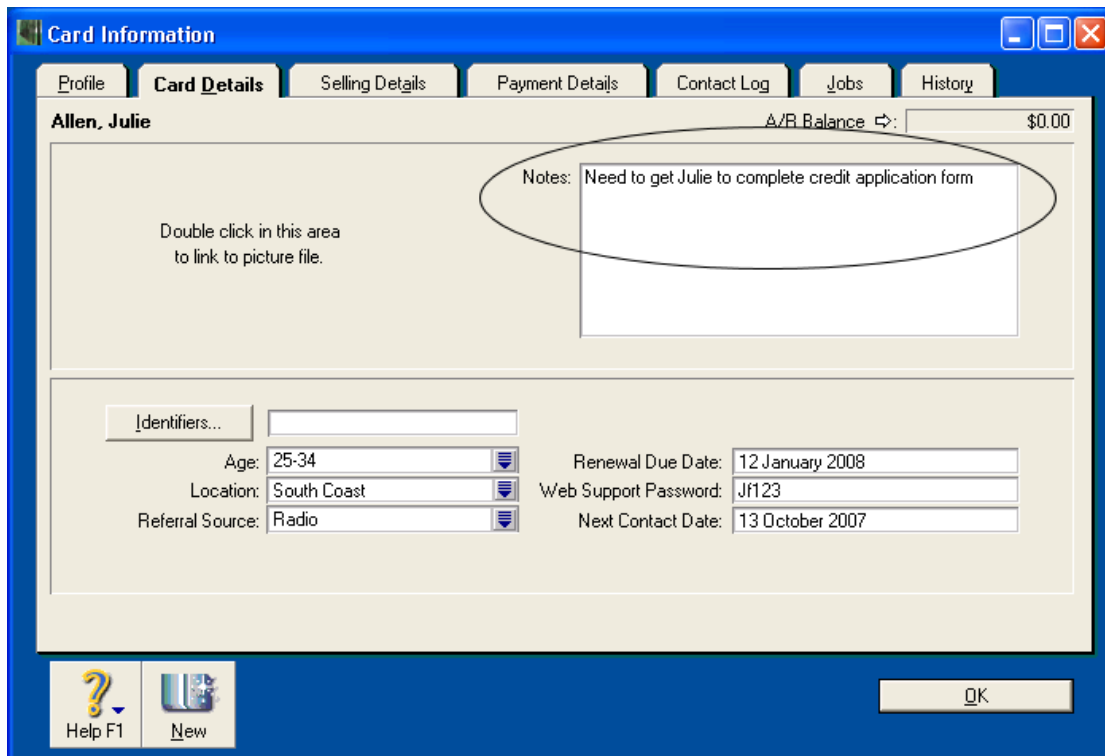
You can do either. However, the advantage of storing customer notes in MYOB is that this information then flows seamlessly into Outlook, using your **youGROW** integration. This means you have the same notes in both places.

However, before using the Notes field, check that there's not a more appropriate place to store this information in your customer cards. As mentioned above, any information that categorises a customer into a group should be stored using Custom Lists, and one-off information that you

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consistently record about most customers should be stored in Custom Fields. On top of this, you'll also find that customer cards in MYOB software have room to record up to five addresses, three phone numbers, fax number, email, Web address, contact name, and the name to whom mail merge letters should be addressed.

What this means is that the Notes field is where you store unstructured information about a customer, such as 'not a good payer – ask for payment up front'; 'partner's name is John', 'owner only works in shop Mondays and Fridays' or any other information that's not 'list' based. **youGROW** synchronises the customer notes field, meaning that when you're working in Outlook, you can search or filter on any of the words entered in this Notes field.



Use the Notes field to store one-off unstructured information about customers

Okay, so I've organised my customers into groups. What about my inventory?

You can use exactly the same principles to organise inventory into groups as you do for customers. In other words, the very best method is to use the Custom Lists feature, which is found under the Item Details tab for every inventory item in your list.

Your choice of description will vary, depending on the kind of products you sell. For example, if you sell clothing and you want to categorise items according to colour and size, you might enter Colour and Size as the names

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of Custom Lists #1 and #2. Or, if you sell CDs, you could enter Artist and Distribution Method as the names of Custom Lists #1 and #2.

By the way, Custom Fields can come in handy for inventory items also. You can get an idea of some possibilities by looking at the screenshot below.



Custom Lists and Custom Fields are ideal for storing additional information about your inventory

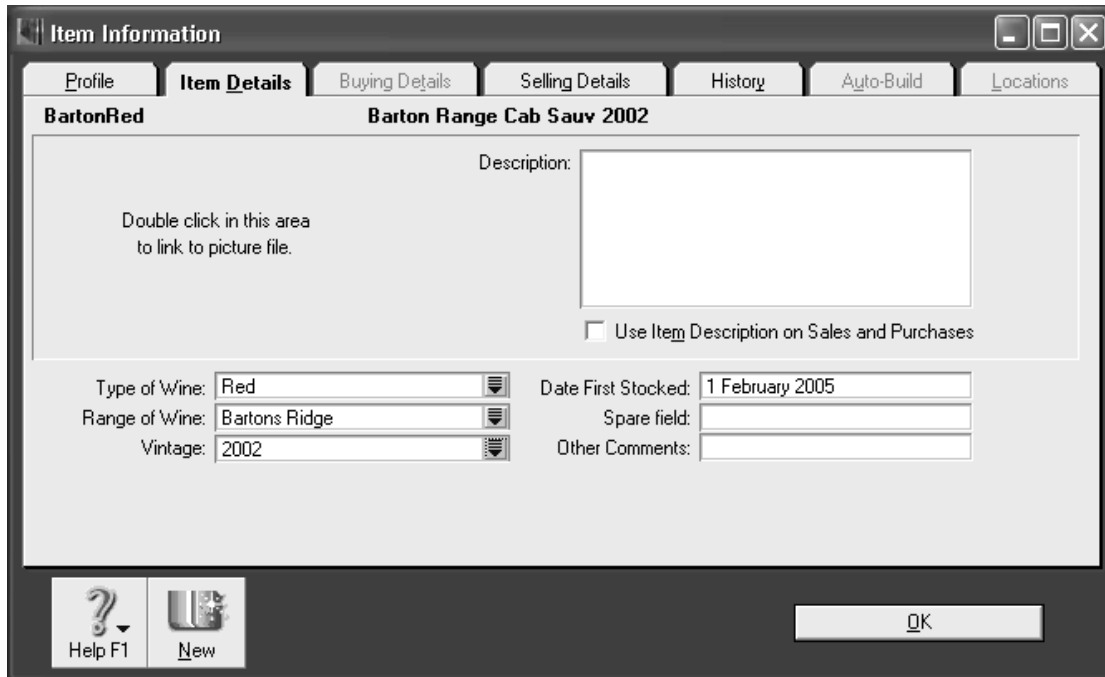
Will youGROW pick up on sales info about individual products, or product groups only?

Both! For example, imagine a winery uses MYOB software for all their sales, and they use Custom Lists in the following way:

- They use the first custom list to categorise their wine by type (red, white and sparkling).
- They use the second custom list to denote the range of the wine (Bartons Ridge, Conembura, Darembara).
- They use the third custom list to denote the vintage (1998, 1999, 2000, etc).

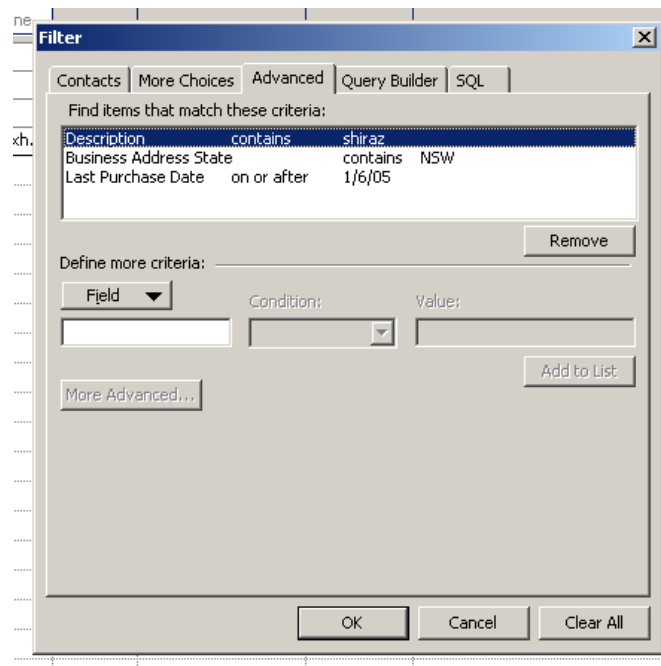
The Item Name has a unique product code and the Item Description states the exact name of the wine.

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MYOB screenshot showing Item Detail for a bottle of wine

With this system in place, **youGROW** allows almost infinite segmentation to find everyone who has bought red wine, but not white, who has bought from one range, but not another. Or, you could get a list of customers that bought a particular kind of wine or a particular price bracket.



Caption: Here's an example of just one enquiry you could generate using Outlook and youGROW to analyse customers based on product sales history, where we want to find all customers who have bought Shiraz, Live in NSW, and who have bought since 1/6/05

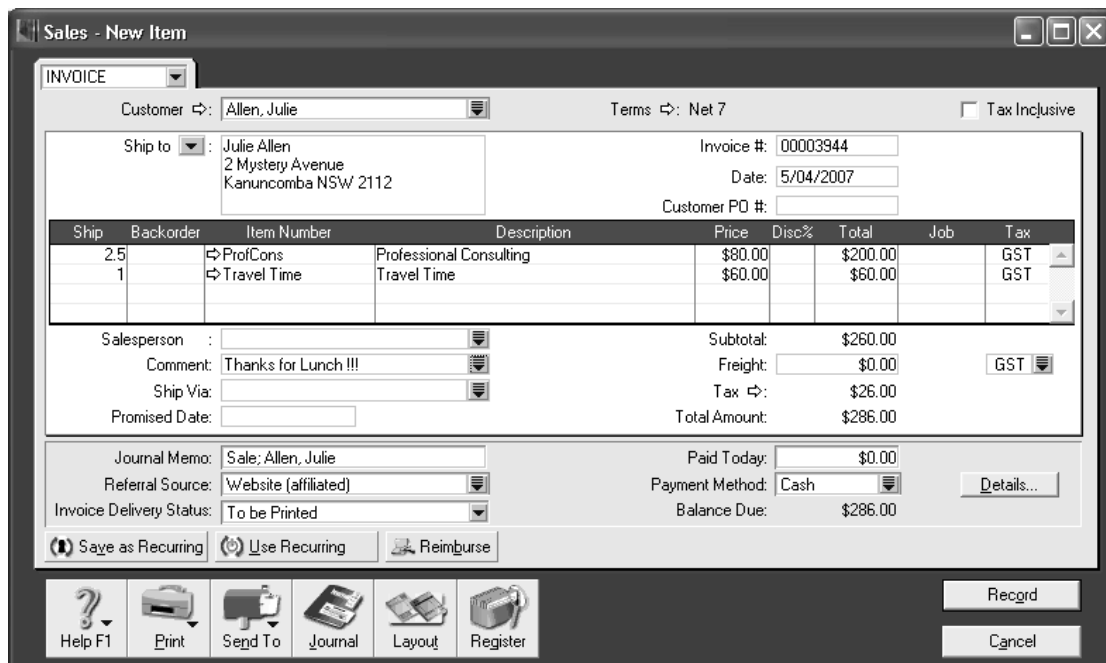
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This example relates to wine, but of course you can apply these same principles to your business.

- If you're selling clothing, you can group products by range/make, colour and size.
- If you use different pricing structures, you can group products by their gross margin category, e.g. 40%, 50%, 60%, etc. This way, you can choose to run promos only on high-margin items.
- If some products are kept in stock, others are purchased only when a customer places an order, or other products are on consignment, you can set up groups accordingly.

I'm a service-based business and my invoices are free-form text. How do I get meaningful sales information to flow through to Outlook?

Even if you are in a consulting/service type business, then it's a good idea to use Item Sales where practical. (See your MYOB user guide for more details, or pick up a copy of the excellent reference title *Making the Most of MYOB Business Software* by Veechi Curtis, published by Woodslane Press.)



Sales - New Item

INVOICE

Customer: Allen, Julie Terms: Net 7 Tax Inclusive

Ship to: Julie Allen
2 Mystery Avenue
Kanuncomba NSW 2112

Invoice #: 00003944
Date: 5/04/2007
Customer PO #:

Ship	Backorder	Item Number	Description	Price	Disc%	Total	Job	Tax
2.5		ProfCons	Professional Consulting	\$80.00		\$200.00		GST
1		Travel Time	Travel Time	\$60.00		\$60.00		GST


Salesperson: Subtotal: \$260.00
 Comment: Thanks for Lunch !!! Freight: \$0.00 GST
 Ship Via: Tax: \$26.00
 Promised Date: Total Amount: \$286.00

Journal Memo: Sale; Allen, Julie Paid Today: \$0.00
 Referral Source: Website (affiliated) Payment Method: Cash
 Invoice Delivery Status: To be Printed Balance Due: \$286.00

Item Sales are an ideal billing format, even for service-based businesses

What works best is to set up different items for the different services you provide, or the different hourly rates you charge. For example, a consultant might bill for onsite consulting, remote consulting, phone support, field research or travel time, all at different rates. Or, this consultant might bill the same service (e.g. consulting) at different rates to different people.

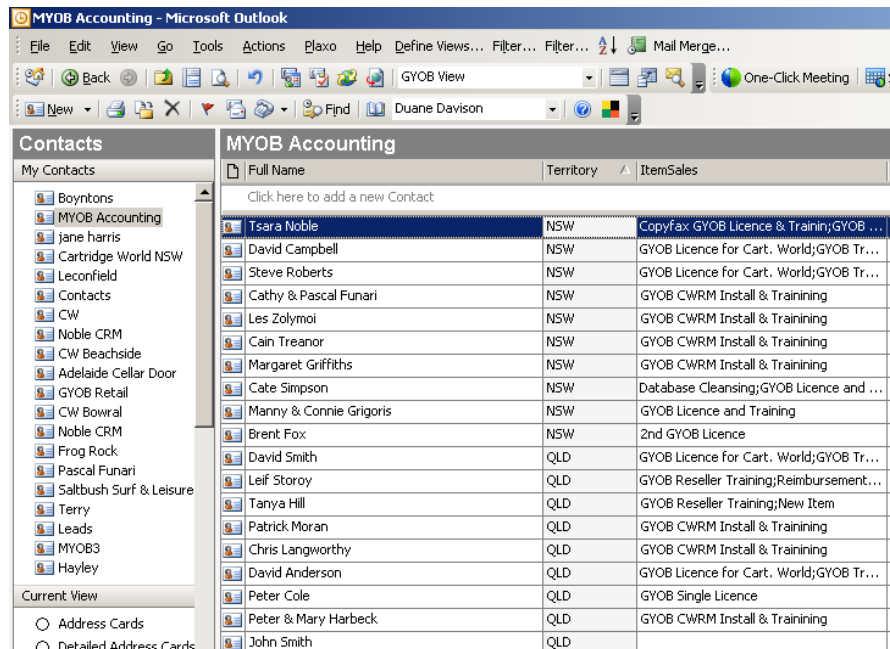
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 By setting up items for each of your services and hourly rates, and using Item Sales in MYOB, this information then flows through to **youGROW** in a format that you can search on. For example, if you bill most clients at \$80/hr but have some older clients still being billed at \$70/hr, you could call up a list in **youGROW** of all your \$70/hr clients (and maybe even send out a letter notifying of an increase in rates!).

How do I know when to use youGROW to generate reports and when to use MYOB?

It's true that you could use MYOB software to generate lots of different reports based on customer or item Custom Lists and Custom Fields. However, what you'll find when you get under the skin of MYOB is that it's rather weak at integrating customer and item information.

For example, it's easy to get MYOB to print a list of customers in a specific sales territory (assuming you've set up sales territories as a custom list). Similarly, it would be easy to print a list of products that each customer had bought. However, what proves trickier is to print what products all customers in a specific sales territory have purchased.



Full Name	Territory	ItemSales
Click here to add a new Contact		
Tsara Noble	NSW	Copyfax GYOB Licence & Training;GYOB...
David Campbell	NSW	GYOB Licence for Cart. World;GYOB Tr...
Steve Roberts	NSW	GYOB Licence for Cart. World;GYOB Tr...
Cathy & Pascal Funari	NSW	GYOB CWRM Install & Training
Les Zolymoi	NSW	GYOB CWRM Install & Training
Cain Treanor	NSW	GYOB CWRM Install & Training
Margaret Griffiths	NSW	GYOB CWRM Install & Training
Cate Simpson	NSW	Database Cleansing;GYOB Licence and ...
Manny & Connie Grigoris	NSW	GYOB Licence and Training
Brent Fox	NSW	2nd GYOB Licence
David Smith	QLD	GYOB Licence for Cart. World;GYOB Tr...
Leif Storoy	QLD	GYOB Reseller Training;Reimbursement...
Tanya Hill	QLD	GYOB Reseller Training;New Item
Patrick Moran	QLD	GYOB CWRM Install & Training
Chris Langworthy	QLD	GYOB CWRM Install & Training
David Anderson	QLD	GYOB Licence for Cart. World;GYOB Tr...
Peter Cole	QLD	GYOB Single Licence
Peter & Mary Harbeck	QLD	GYOB CWRM Install & Training
John Smith	QLD	

Caption: youGROW is excellent at integrating information from several sources to generate powerful reports

This integration of information from different sources is where **youGROW** comes into its own. For example, it's no problem to ask for a list of customers (and choose to contact them by their preferred contact method) that purchased a certain dollar range of products (or product groups) from you in a specific time period from selected sales territories. Or to ask for a list of



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customers who you haven't contacted for six months or more, but who had sales in the last financial year. You can then use these views, or lists, to easily communicate on a one-on-one basis with your customers – via personalised letter or email – with just a few clicks. When you segment your clients and communicate relevant information to them, it's a great way of actually growing your business by improving your customer relationships!

The possibilities are endless!



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Conclusion

There's no doubt that both MYOB software and **youGROW** software are excellent reporting tools, especially when integrated with Microsoft Outlook. However, in order to make the most of this partnership, you need to take time to analyse your customers, products and sales patterns and customise MYOB so that this source information is accessible.

It can seem a daunting task at first – if you've been around for a few years in business and have hundreds or thousands of customers already in MYOB. However, it doesn't take as long as you might think, as you can simply export all of your customers to Excel, add in your custom information in Excel, and import back in to update your MYOB file. (We have specific instructions on this – please ask for a copy. Whilst it's easy to do, you do need to follow the instructions.)

With this groundwork is in place, you'll always be able to use **youGROW** to get exactly the groups of customers you need, in the format you want, at the click of a button.