NEW RELEASE

*you*GROW™ Scheduled Release: September 2009

During the past 4 years, we have focused our development efforts on managing existing customers – a key need for all businesses, and in particular, for our various retail clients. We're really good at this, but we needed more.

We also needed to overcome some key frustrations – in particular, managing leads. With this release, leads can be entered directly into youGROW, without having to enter into your accounting system first, and then synchronise across.

Our new release has some exciting new features to make your sales pipeline management as easy as possible, and some other great new features as well!

New Feature: Add new contact/s from same company

The frustration this resolves:
Your accounting system has not been brilliant in adding additional contacts from the same company.
What this feature will enable you to do:
Enable you to add a new contact from the same company directly into your youGROW Contacts folder. It will copy across the company address, website, fax and business phone numbers – you just enter the individual mobile, email, title and name fields. You can designate whether you want each additional contact to be included in marketing campaigns with a click of a button. Any additional contacts added through this feature will be automatically linked to the existing contact and will display under a new tab "Related Contacts".
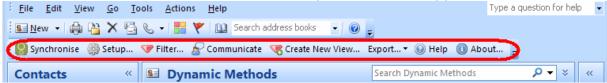
✔ **What we REALLY like about this feature!!**
When you add a new contact in this manner, youGROW will also copy across all the sales history, and customer info information which comes from your accounting system, so that you can capture all the necessary information you need about what the company has purchased, for all contacts you have designated to receive marketing material!

New Feature: youGROW Specific Toolbar:

The frustration this resolves:
You won't have to customise any individual toolbars to get to your most frequent commands – youGROW will install with its own toolbar, with all the features you need in one easy place.

What this feature will enable you to do:
Make it easier for users to find exactly the command they need.

✔ **What we REALLY like about this feature!!**
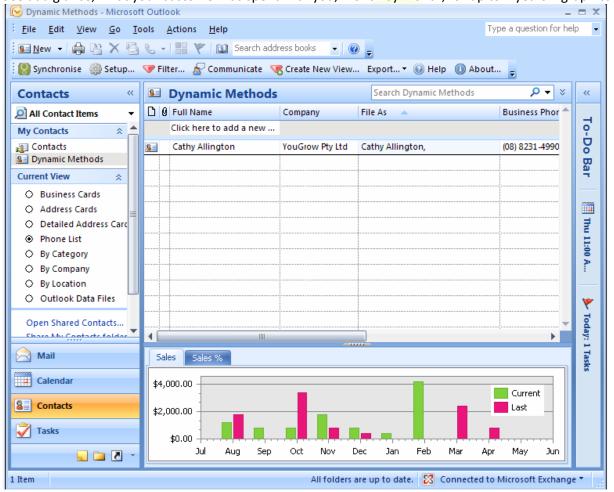Makes it easier to have all your commonly used commands, in the one place!

New Feature: View a Client's Sales History with you – month by month, and this month compared to same month last year! (MYOB Accounting only in this release)

The frustration this resolves:
You're talking to, or about to talk to, an existing client. You want a month by month snapshot of what they've previously spent with you, and which future months you can expect good sales based on their past history. And you don't want to have to go into your accounting system to generate a report!

What this feature will enable you to do:
See at a glance, what your customer has spent with you, month by month, for up to 2 years – graphically!

What we REALLY like about this feature!!
youGROW will enable you to see at a glance how their spending for any month this year, compared to the spending in that month for the previous year.

New Feature: Import into youGROW

The frustration this resolves:

You can now import your leads directly into youGROW, and choose to map any of the custom fields.

What this feature will enable you to do:

Use your existing lead lists, and map to any of the custom lists and fields in the youGROW contacts folder – in just a minute or so!

What we REALLY like about this feature!!

You can make any existing lead list, usable in youGROW, and you choose which fields are mapped where!

New Feature: Change contact information directly in youGROW

The frustration this resolves:

An existing client changes their mobile number, address, email, or whatever. Previously, you had to go into YOUR ACCOUNTING SYSTEM to change this, and resynchronize, to have access to the updated information.

What this feature will enable you to do:

Change any of the contact information directly in youGROW – the only information you can't change, is the detail about what they have purchased – this has to come from your accounting system, so this can't be changed – for obvious reasons.

What we REALLY like about this feature!!

When a user changes any of the contact information about an existing client which has been synchronised originally from your accounting system, youGROW will detect this automatically, and open up an email addressed to the your accounting system Administrator (selected in the set-up), with the changed information!

New Feature: Mail Merge to Fax or SMS:

The frustration this resolves:

Some business – retailers in particular – are not great on responding to emails, but respond well to fax. And whilst we are not a big fan of general SMS marketing, there are some instances where SMS messages really come into their own, such as sending out a reminder for an event clients have responded to. We have reviewed many services for fax and email – by far, the best we reviewed was "UTBox" – see www.utbox.net. youGROW will also map the mobile phone number field to "email 2" in the customer contact card, in the format: "mobile@utbox.net", and the fax number to email 2 in the customer contact card, in the format fax@utbox.net. You won't need to do any rekeying – youGROW will do it for you.

What this feature will enable you to do:

From any view, you can simply mail merge to either fax or email, and personalise your messages as you do currently with letters or emails..

What we REALLY like about this feature!!

Using this service will cost you less than sending out a normal fax or SMS, and will be much easier.

New Feature: Sales Pipeline Tab:

The frustration this resolves:
You won't have to go into your accounting system to change sales pipeline details, or add new contacts that you have not yet invoiced.

What this feature will enable you to do:
There will be another additional Tab on your youGROW Contacts Form, which will have the following fields:

1. **Sales Stage**. Will install with 6 separate "standard" sales stages – Cold, Initial Approach, Presentation, Quote Prepared, Closed, Lost. The user can edit the names of these sales stages in the setup, to whatever they want. **We REALLY like the fact that**, each time you change a sales stage, youGROW asks you for comments as to what happened to make the sales stage change – so you always know exactly what has happened!
2. **Sales Lead Date:** Defaults to "today's date", but can be changed. You automatically keep track of when you add new sales leads.
3. **Potential Sales Value:** A currency field to allow you to enter what you expect the lead to be worth.
4. **Lead Source:** Selected from a drop down list which can be changed or added to in the set-up at any time.
5. **Potential Product:** A free form notes field
6. **Comments:** A free form text field, which is in addition to comments made when the Sales Stage changes.
7. **Next Follow-Up Action** Automatically opens up a task form which is linked to the contact's activities – you'll never forget a follow up again!
8. **Salesperson:** Drop down list editable in set-up.
9. **4 User defined fields:** Can be changed within the setup – you have the option for a date, text, numeric or drop down list for each user defined field.

What we REALLY like about this feature!! (There are a few things …)

1. You keep all of your contacts in one database – both customers and leads – and you can filter and create views from any of the fields.
2. You can also simply drag an incoming email directly into your youGROW Contacts folder to open up a new lead. youGROW will automatically copy the email address and first and last name into the respective fields, and copy the body of the email text into the Comments field on the first tab!!
3. And, when you're ready to invoice, simply click a button, and youGROW will open up an email to send through to your accounting system Administrator, with all the relevant information they need to enter into your accounting system and generate an invoice!
4. You'll be able to see at a glance, which of your contacts originate from your accounting system, and which don't!
5. Your salespeople won't have the ability to change your accounting file, without your permission. You have complete control over your company data.

New Interface: Ostendo:

Ostendo is a mid range accounting system for those companies who have outgrown MYOB accounting. It is an extremely flexible system, with so many more features than MYOB simply can't handle. We've reviewed a number of mid range accounting systems – Ostendo was our preference in this market in the first instance – due to the flexibility, the functionality, and the company behind Ostendo.

Our interface in the first instance will provide the same functionality as our existing MYOB Accounting interface, with Sales Lead Tracking also. The graphical display of what customers have bought from you month by month will not be available until our next release – scheduled for November this year.

Implementation and setup is easy – it is simply a matter of selecting "Ostendo", as the interface .

Mid range accounting system users are traditionally seeking Sales Lead Tracking. With this release, we not only provide the ability to manage leads, but also provide a powerful interface to your existing customer data already held within Ostendo, to foster relationships to build repeat and referral sales.

Additional Fields Synchronised from both MYOB Accounting and RetailManager:

To enable still more flexibility in using the information you already have within MYOB Accounting or RetailManager, this release will also synchronise the following fields;

Additional Fields synched from MYOB RetailManager:	Additional Fields to be synched from MYOB Accounting Products
Pricing Grade	Shipping Method (from Customer Card)
Customer Notes	Item Price Level – from Customer Card
Survey	Invoice Number
Item Code	
Customer Barcode	

New Feature: Copy to Excel:

The frustration this resolves:

You won't have to remember the clicks to copy a view into Excel

What this feature will enable you to do:

From any view, you can just click one button, and it will copy the entire view into Excel.

What we REALLY like about this feature!!

It gets rid of the end of record breaks in the Street Address fields and any other comments field where you have a line break! REALLY easy to export any view, in the exact format you need!