

November 16, 2009



# Intuit Customer Manager Helps Small Businesses Strengthen Customer Relationships to Grow Their Business

New Service Manages and Tracks Contacts Online and On-the-Go

MOUNTAIN VIEW, Calif.--(BUSINESS WIRE)-- Managing customer relationships just got easier and more efficient with [Customer Manager](#) from [Intuit Inc.](#) (Nasdaq:INTU). The new service allows small businesses to keep and track all their customer information in a single place, making it available when and wherever they need it.

Customer Manager, built on the [Intuit Partner Platform](#), is available as an online service and mobile application. It provides access to up-to-date, important information, letting small businesses spend less time searching for data and more time focusing on customers.

Customer Manager for Mobile provides access to important details for business owners and employees while outside the office. They can search for contact information, see past due balances, add and view notes, or see a map of a customer's address. The service is designed to work on popular smartphones. It currently supports BlackBerry<sup>(R)</sup> Curve<sup>tm</sup> 8520, 8300 and 8800 series, and Intuit is actively working with other smartphone manufacturers to roll out on additional devices.

"Small businesses rely on the strength of their relationships with customers to grow. This is especially important in today's economy, as all businesses look for ways to both keep their current customers happy and acquire new ones," said Angus Thomson, vice president and general manager of Intuit's Grow Your Business division. "Until now, there has not been a solution in the market that truly meets small businesses' needs. Customer Manager fills this gap. We designed it to work how small businesses really work - to make it easy for them to provide great service, keep growing and be as successful as possible."

Get Organized and Save Time

Small businesses tend to keep customer information in multiple locations, according to recent Intuit research. These can range from a notepad or wall calendar to an Excel spreadsheet or e-mail contact list - often limiting access to one person at a time.

Customer Manager provides several features to help small businesses save time by organizing their customer information all in one place. Its top features include:

- Access to Customer Data Anytime, Anywhere:Provides access to up-to-date information online or on-the-go.
- QuickBooks Sync:Automatically syncs with QuickBooks 2009 or 2010 financial data, allowing the customer contact database to remain up-to-date and in one place. It also updates with the most important financial information like current and overdue balances. This lets small

businesses know if a customer is in good standing or has a payment due, so they can easily mention it during a conversation or when sending an e-mail.

- Customer View: Consolidates all contact information, key financial data from QuickBooks, pending tasks, scheduled appointments and critical notes about customers in one place, making organization a snap.
- Contact Import: Quickly imports existing contact data into Customer Manager from popular applications like Outlook.

"When a customer calls us for information it doesn't matter where I am located. I can immediately pull up their information and leave notes for tracking purposes," said Joy Allgood, sales and marketing representative of Dental South Inc. in Gainesville, Ga. "Being able to have instant access to important information, such as item numbers and POs, means we don't have to dig through files and it saves us a lot of time and money."

### Improve Collaboration and Be More Productive

Today's small business owners and employees also tend to wear several hats, bringing many of them in contact with customers. Customer Manager helps small businesses be more productive by providing several collaboration tools so after communicating with a customer, the same information will be ready and available for the next employee to provide a seamless experience. These include:

- Shared Calendar and Tasks: Tracks customer appointments, office schedules, team meetings, work due dates and team responsibilities accessible from any location.
- Custom Fields: Enables users to tailor Customer Manager to meet their unique business needs. Organizes customer information with customizable fields--like "referred by," "preferred payment method" or "warranty expiration dates."
- Groups: Sorts and displays groups of customers with common traits such as "prospective customers," "date of last purchase," "account status" or "upcoming birthdays."

### Pricing and Availability

Small businesses can sign up for a free 30 day trial of Customer Manager at [www.customermanager.com](http://www.customermanager.com). Following the free trial, the service is \$9.95 a month with access for up to five users. This includes support for unlimited contacts, mobile access and all other features.

### Resources:

- Intuit Press Room
- Intuit on Twitter
- Small Business United Blog

### About Intuit Inc.

Intuit Inc. is a leading provider of business and financial management solutions for small and mid-sized businesses; financial institutions, including banks and credit unions; consumers and [accounting](#) professionals. Its flagship products and services, including QuickBooks(R),

Quicken(R) and TurboTax(R), simplify [small business management](#) and [payroll](#) processing, [personal finance](#), and [tax preparation](#) and filing. ProSeries(R) and Lacerte(R) are Intuit's leading tax preparation offerings for professional accountants. The company's financial institutions division, anchored by Digital Insight, provides on-demand banking services to help banks and credit unions serve businesses and consumers with innovative solutions.

Founded in 1983, Intuit had annual revenue of \$3.2 billion in its fiscal year 2009. The company has approximately 7,800 employees with major offices in the United States, Canada, the United Kingdom, India and other locations. More information can be found at [www.intuit.com](http://www.intuit.com).

Intuit, the Intuit logo and QuickBooks, among others, are registered trademarks and/or registered service marks of Intuit Inc. in the United States and other countries.

Source: Intuit Inc.