

XACT[®]

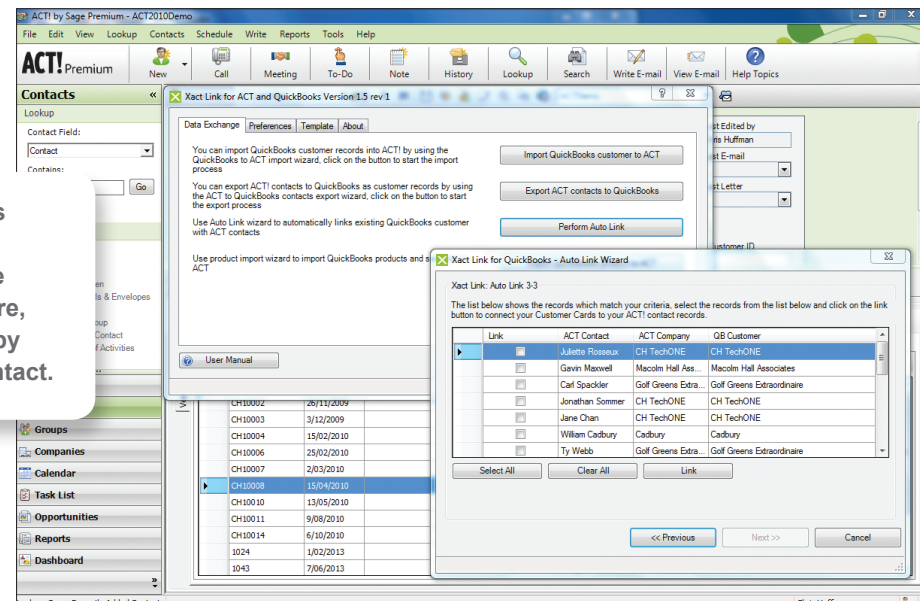
LINK_{FOR}ACT!

and QuickBooks[®]

Now see it in action

For a demonstration of the Xact Link for ACT! and QuickBooks go to:
www.actforqb.com

+ Import QuickBooks customer records into ACT! using the 'auto-linking' feature, matching records by company or by contact.



DOWNLOAD FREE 30 DAY TRIAL

Pricing of the full license is detailed on our website

The application is easy to install direct from our website. Please check that you have the relevant system requirements and correct versions of ACT! and QuickBooks before you download the link.

System requirements

The Xact Link for ACT! and QuickBooks has the same system requirements as ACT!

Compatibility

The Xact Link for ACT! and QuickBooks is compatible with the following versions of ACT!:
(the link is compatible with Standard, Pro and Premium versions)

• ACT! 2007 • ACT! 2008 • ACT! 2009 • ACT! 2010 • ACT! 2011

Note: The link is not compatible with ACT! Premium for Web

The Xact Link for ACT! and QuickBooks is compatible with both Pro and Premium products of the following versions of QuickBooks:

• QuickBooks 2004 • QuickBooks 2005 • QuickBooks 2006 • QuickBooks 2007
• QuickBooks 2008 • QuickBooks 2009 • QuickBooks 2010 • QuickBooks 2011

The Xact Link for ACT! and QuickBooks is compatible with Windows XP, Windows Vista, Windows 7 and 64bit Windows Operating Systems.

Note: Although the link is compatible with 64 bit Windows and Windows Vista, some versions of ACT! may not be compatible, please consult your ACT! documentation or ask your ACT! consultant for details.

ACT!
by Sage

The Xact Link for Act! and QuickBooks will be submitted to QuickBooks for Technical Review.

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XACT[®]
SOFTWARE SOLUTIONS

XACT[®]

LINK_{FOR}ACT!

and QuickBooks[®]

+ **NEW EDITION**
Integrate America's #1 small business financial software with the #1 selling contact and customer management software



Turn your business processes into profit with one small link

The Xact Link for ACT! and QuickBooks is a simple plug-in application that allows you to combine your existing financial and non-financial customer information to create a 360° customer view from within a single application.

Sales staff who rely on ACT! to provide them vital customer information can now reach important sales history, account status, invoice detail etc, that they need to serve their customers. Direct from the ACT! customer record, live access to QuickBooks data and processes such as sales order and invoice creation. No longer do they need to question others or go hunting for information, the barrier between isolated business applications is removed.

The Xact Link for ACT! and QuickBooks enables the front-office to back-office workflow that small to medium business owners have been asking for, using everyday business software they are familiar with – no need for expensive corporate solutions.

Confidential accounting information can be secured as the Xact link allows setting of role based security through in-built access control, fine tuning each ACT! user for their own ACT! to QuickBooks workflow need.

One small link will see ACT! and QuickBooks users reaping the benefits of a fully integrated CRM application, enabling them to:

- manage customer relationships more effectively
- reduce operating costs
- increase profitability.

Front to back
office integration,
360° customer
visibility and
seamless data
consistency
throughout
the business.

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SOFTWARE SOLUTIONS

ACT!
by Sage

How your business will benefit

Eliminate dual entry of records. Import QuickBooks account records, in bulk, or individually into ACT! to immediately populate ACT! with established records from accounts. A link is created between the ACT! record and the QuickBooks record so that updating from either application is simple.

Establish straight-through processing practices between the sales team (front office) and the accounting team (back office). Thus smoothing the sales process, reducing the overhead and inefficiency of passing verbal or written instruction from sales to accounts.

Enable sales and administration staff to create estimates, orders and invoices from the front office. Ease the load on accounting staff and empower the sales team to complete sale documentation independently. This process does not compromise the integrity of accounting processes that should remain under accounting staff control. e.g. preventing the sales staff from deleting invoices.

Provide customer facing sales staff with the ability to monitor a customer's account, with aged receivables details (30, 60, 90 day display). Allows sales staff to assist accounts with credit control tasks and getting on top of overdue accounts at the time a customer is on the phone requesting another order.

The Xact link for ACT! and QuickBooks is an ACT! plug-in. When installed it operates as a Tab within the contact detail view within ACT! In addition it provides a new menu item within the Tools menu in ACT! The application can work for multi-user or single user.

ACT! by Sage Premium - ACT2010Demo

File Edit View Lookup Contacts Schedule Write Reports Tools Help

New Call Meeting To-Do Note History Lookup Search Write E-mail View E-mail Help Topics

Contacts

Lookup

Contact Field: Contact

Contains: Go

More Options...

Related Tasks

View All Contacts

Write Letter

Attach File

Print Current Screen

Print Mailing Labels & Envelopes

Modify Layout

Add Contact to Group

Relate to Another Contact

Schedule Series of Activities

Marketing Results

Notes History Activities Opportunities Groups/Companies Secondary Contacts Relationships Documents Web Info Contact Access User Fields Personal Info QuickBooks

Linked to: Abercrombie, Kristy

View Customer Details

Update QuickBooks Customer

Report

Overview Estimates Sales Orders Sales Invoices Sales Receipts Aged Receivables

New Invoice

Showing: All

Job: (all)

Refresh Find

Invoice # Date PO Number Total Amount Balance Due Paid Due Date Job Memo

CH10002 26/11/2009 53.88 26/12/2009 Kitchen

CH10003 3/12/2009 20.06 2/01/2010 Kitchen

CH10004 15/02/2010 141.38 17/03/2010 Remodel Bathroom From ACT! Opportunity (Bathroom fix)

CH10006 25/02/2010 26.94 27/03/2010 Remodel Bathroom

CH10007 2/03/2010 18.32 1/04/2010 Remodel Bathroom

CH10008 15/04/2010 391.00 1/04/2010 Remodel Bathroom

CH10010 13/05/2010 6561.94 12/12/2013 Remodel Bathroom

CH10011 9/08/2010 53.88 28/03/2010 Remodel Bathroom

CH10014 6/10/2010 50.00 5/11/2010 Remodel Bathroom

1024 1/02/2013 0.00 3/03/2014 Kitchen

1043 7/06/2013 0.00 7/07/2014 Family Room

ONE CH TechONE

Phone 415-555-6579 Ext

Last Edited 13/10/2010 Last Edited by Chris Huffman

Contact: Abercrombie, Kristy

Salutation Kristy

Company

E-mail kristy@samplename.com

Web Site

Key Contact

Title

Address 5647 Cypress Hill Rd

First Purchase

Customer ID

Marketing Results

Notes History Activities Opportunities Groups

Linked to: Abercrombie, Kristy

New Estimate

Showing: The

613 12/12/2013

CH1011 15/12/2013

Invoice

GST Reg No: xx-xxx-xxx Date: 15/04/2010 Invoice No: CH10008

To: Abercrombie, Kristy Kristy Abercrombie 5647 Cypress Hill Rd Bayshore, CA 94326

PO No. Terms: Net 30

Description Qty Rate Amount Tax

Custom Custom counters 1 100.00 107.75 Tax

Removal labor 1 33.25 33.25 Non

Install carpeting 1 250.00 250.00 Non

Tax Total: \$7.75

Total: \$391.00

This invoice is issued under the Terms and Conditions of Xact Software Solutions Terms Of Trade

All software and hardware must be fully paid for in advance. Ownership of goods does not pass to the customer

Estimates, Sales Orders, Sales Receipts, Invoices and Aged Receivables can be viewed from within ACT!

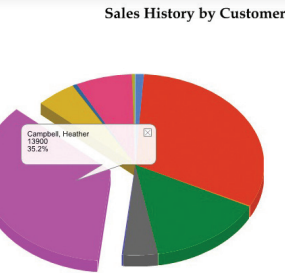
Attach estimates and invoices to the History in ACT! and simply email to your customer directly as a pdf attachment.

New edition includes integration to Google Maps and Charts

Address type: Bill Address

Map of customer Bill Address in CA

Create a QuickBooks invoice from within ACT! using items pulled from QuickBooks.



Create an estimate from an existing Opportunity using information pulled directly from QuickBooks.

Key features of the link

1. Import QuickBooks customer records into ACT! using the 'auto-linking' feature, matching records by company or by contact.
2. Export and link ACT! contact records as customer records in QuickBooks.
3. Update QuickBooks customer details from within ACT!
4. Create a new customer record in QuickBooks from an ACT! record with the click of a button.
5. Attach estimates, invoices and sales receipts to History tab in ACT! and email to your customer as a secure pdf attachment through integration to Outlook.
6. Create estimates, sales orders, sales receipts and invoices from within ACT!
7. Save estimates, orders, sales receipts and and invoices from QuickBooks against the ACT! record.
8. View aged receivables from ACT!
9. Link to your vendors in QuickBooks and create or view purchase orders.
10. Key sales statistics and history such as YTD and Average Sales drawn live from QuickBooks.
11. Integrated with the ACT! Opportunities and Sales process. You can prepare an estimate for your prospects from ACT! using the up-to-date Item List from QuickBooks so that you and your sales staff are quoting with accurate information across the organisation.
12. Access control feature to define precisely what QuickBooks operations individual ACT! users can perform from ACT!

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