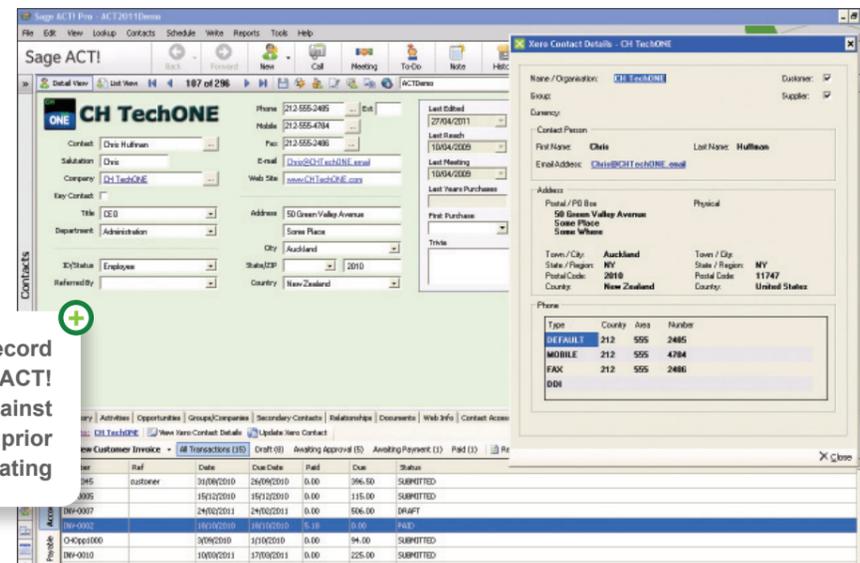# ACT!CRM LINK FOR XERO

Now see it in action

For a demonstration of the Xact Link for Xero go to:

www.xactsoftware.co.nz

Xero account record accessible from ACT! to check details against the ACT! record prior to updating

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 Xero before you download the link.

System Requirements
The Xact Link for Xero has the same system requirements as ACT!, you will require:
• A supported version of ACT! *(see below)*
• An active Xero account

ACT! Compatibility
The Xact Link for Xero is compatible with the following versions of ACT:
• ACT! 2007 (ACT! 9.0)
• ACT! 2008 (ACT! 10.0)
• ACT! 2009 (ACT! 11.0)
• ACT! 2010 (ACT! 12.0)
• ACT! Pro 2011 (ACT! 13.0)
• ACT! Pro 2012 (ACT! 14.0)

The link is compatible with both the Premium and the Pro (standard) versions of ACT!

The link is compatible with Windows XP, Windows Vista and Windows 7 32 and 64 bit; however some earlier versions of ACT may not be.

** ACT! 9 (2007) is not supported on windows Vista.
** ACT! (2007) & ACT 10 (2008) are not supported on 64-bit operating systems.

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XACT®
SOFTWARE SOLUTIONS

NOW AVAILABLE

Integrate the world's #1 selling contact & customer management software with the world's easiest online accounting system

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

Turn your business processes into profit with one small link

The **Xact Link for Xero** is a simple plugin to ACT! contact and customer manager, bringing together an affordable integration of customer and financial data in one smooth process. Create a 360° customer view within one application.

Small business's globally who use ACT! can now connect live to their online Xero accounting software, capturing important sales history, invoice detail and account status information needed to serve customers effectively. **Xact Link for Xero is the desktop-to-cloud connection**, bringing together powerful desktop CRM and the 'anywhere, anytime' convenience of Xero.

No other CRM integration to Xero provides the flexibility and maturity of ACT!'s renowned, easy to navigate, easy to use, contact and customer manager – used by over 2.8 million people worldwide.

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

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

XACT®
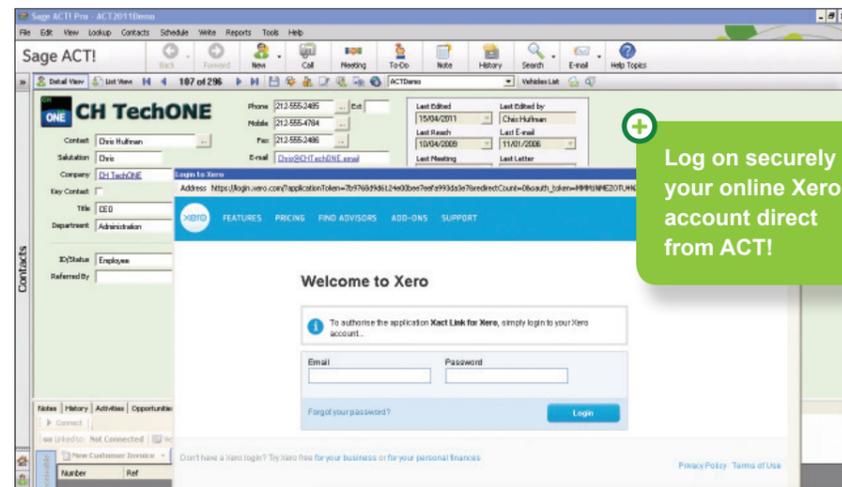SOFTWARE SOLUTIONS

How your business will benefit

Eliminate dual entry of records. Import Xero 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 Xero 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). Therefore smoothing the sales process, reducing the overhead and inefficiency of passing verbal or written instruction from sales to accounts.
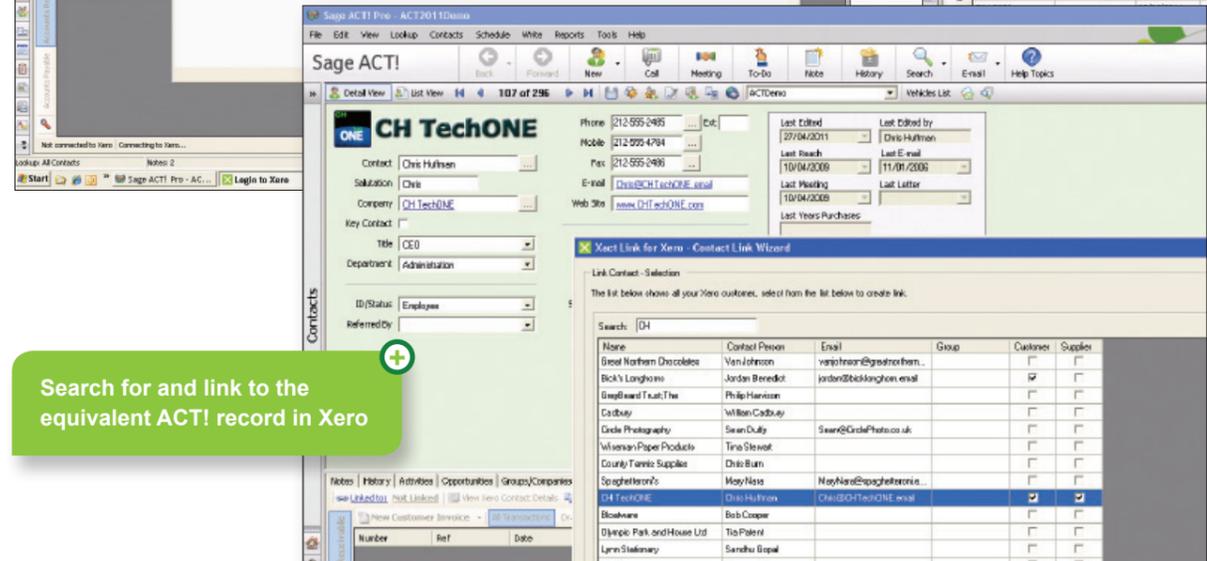
Provide customer-facing sales people with an immediate view of a customers account prior to extending credit and completing a sale. Without integration of CRM with accounts you are not equiped to know if the customer placing an order has good credit standing. With accounting integration a quick glance at outstanding invoices before proceeding with a sale can help reduce the incidence of bad debts.

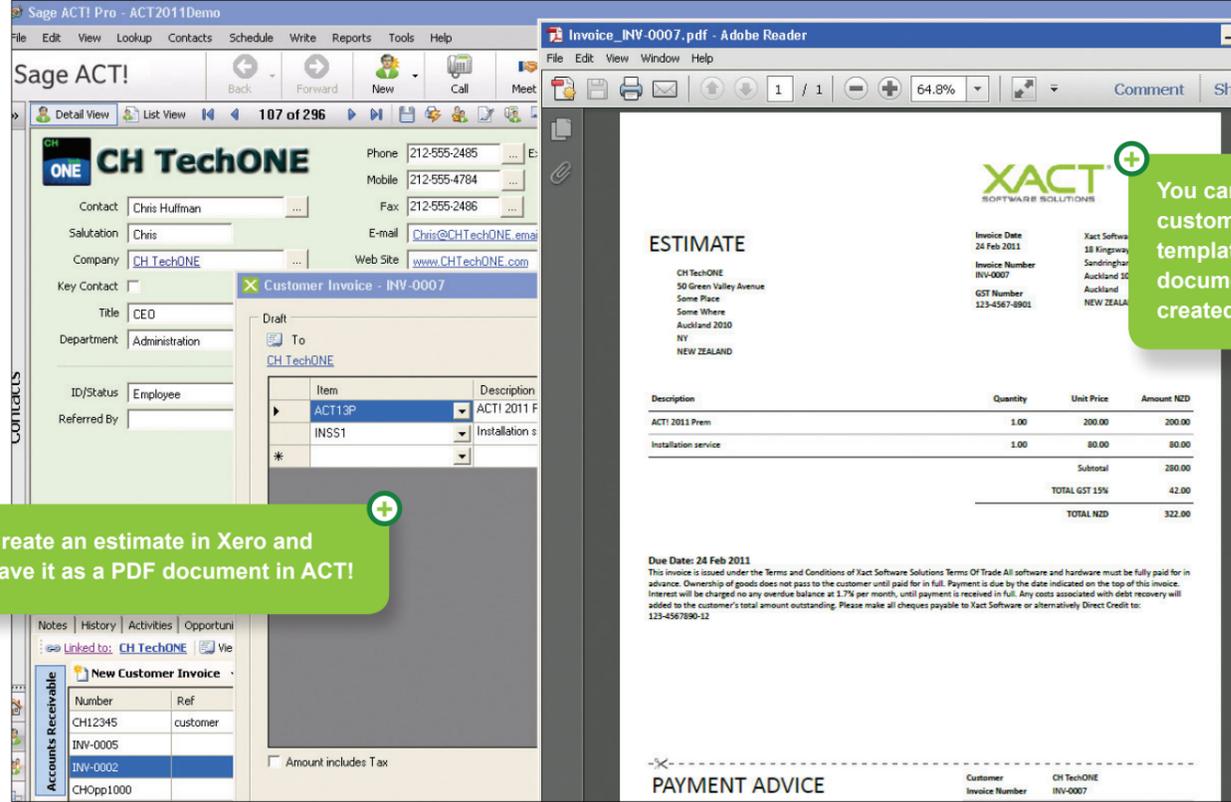## The Xact Link for Xero is an ACT! plug-in.
When installed it operates as a tab within the contact details view in ACT! It enables the connection of ACT! (a desktop installed software) to work with Xero (an online, browser based software). You can access your customer information in ACT! even when you have no online connection to Xero.

You can customise your templates for documents created in Xero

Create an estimate in Xero and save it as a PDF document in ACT!

Log on securely to your online Xero account direct from ACT!
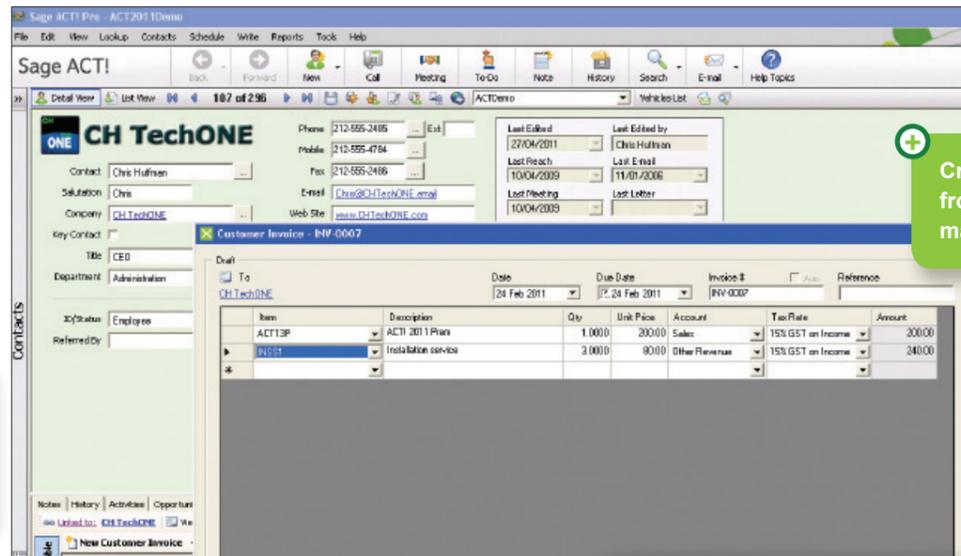
Create a Xero invoice from ACT! using items made available from Xero

Search for and link to the equivalent ACT! record in Xero

Key features of the Xact link

1. Import Xero customers records into ACT! using the 'auto-linking' feature, matching records by company or contact.

2. Export and link ACT! contact records as customer records in Xero.

3. Update Xero customer details from within ACT!

4. Create invoices from within ACT!

5. Attach invoices to the customer record or document library in ACT!, as you email the invoice for payment.

6. View both customer and supplier invoices from within ACT!

7. Enables Xero line items to be available in ACT!, unlocking the vital quote-to-sales workflow from ACT! to Xero.

8. With the accounts payable displayed in ACT! your sales staff can keep an eye on any overdue debt when the customer calls to place the next order.

9. Using ACT! 's sales and opportunity process, sales staff can convert their closed/won sales in ACT! to a Xero invoice in one smooth process.

ACT! CRM
LINK FOR XERO

Cloud or Desktop – we've got you covered
Want all the features of ACT! and Xero available online?

Introducing in 2011 – ACT! and Xero Online – a complete online solution for small business. The rich CRM features of ACT! integrated to Xero will give you a fully online and affordable business suite. Benefit from *ACT! Premium for Web's* complete integration with Microsoft Outlook®, capturing email against your customer directly from Outlook. No other CRM solution for Xero offers so much without the overhead of multiple add-ons, just to do what ACT! already does. Including customisable workflow and e-marketing.