Now see it in action...
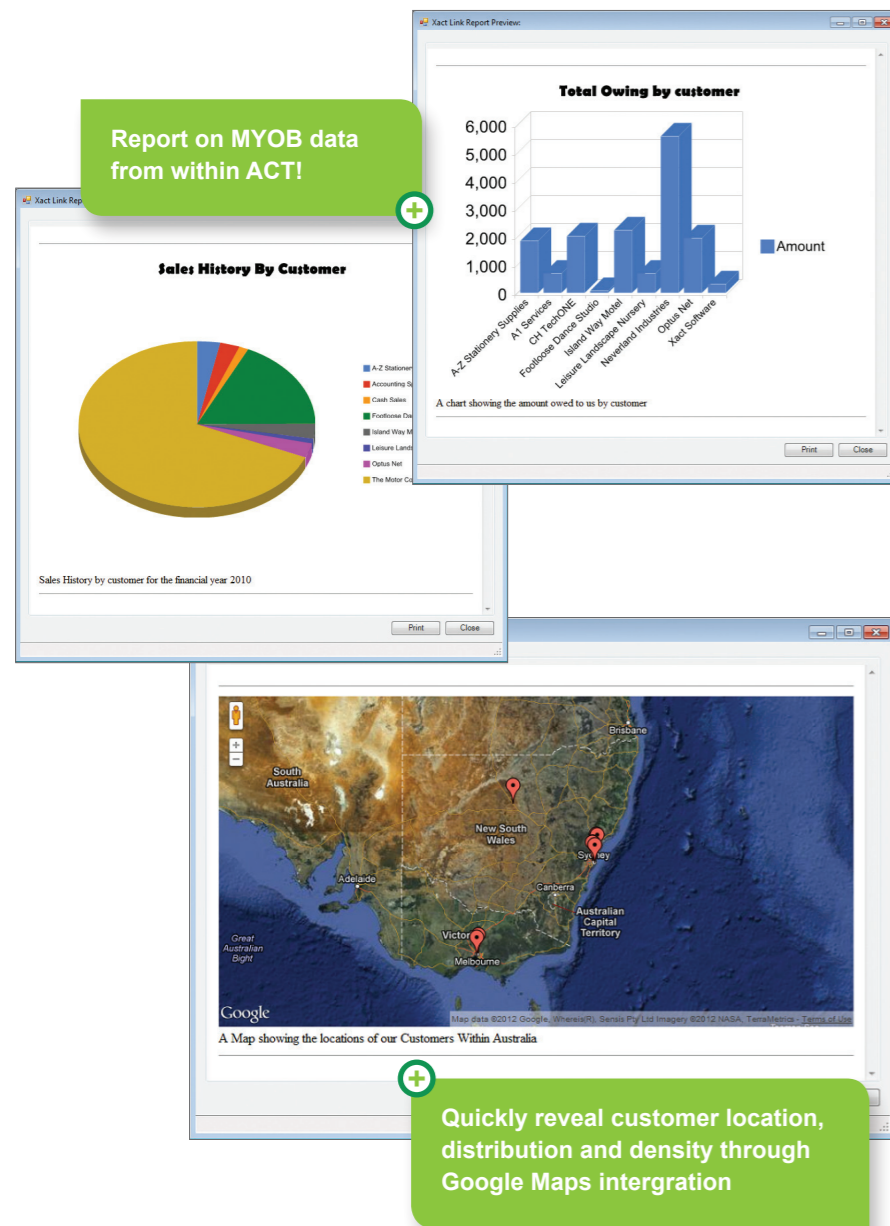
Go to: www.xactsoftware.co.nz/xlam

For a demonstration of the Xact Link for ACT! and MYOB

Report on MYOB data from within ACT!

Total Owing by customer

A chart showing the amount owed to us by customer

Sales History By Customer

Sales History by customer for the financial year 2010

A Map showing the locations of our Customers Within Australia

Quickly reveal customer location, distribution and density through Google Maps intergration

System requirements

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

Compatibility

The Xact Link for ACT! and MYOB is compatible with the following versions of ACT! Pro and ACT! Premium (note: the Xact Link for ACT! and MYOB is not compatible with ACT! Premium for Web):

• ACT! 12.0 (ACT! 2010)
• ACT! 13.0 (ACT! 2011)
• ACT! 14.0 (ACT! 2012)
• ACT! 15.0 (ACT! 2013)

Previous releases of the Xact Link for ACT! and MYOB work with ACT! 11.0 (2009) and below. If you are running ACT! 11.0 (2009) or below please contact us and we can provide you with a compatible version of the link.

The Xact Link for ACT! and MYOB is compatible with the following versions of MYOB:

• MYOB Accounting (18,19,19.5,19.6)
• MYOB Accounting Plus (18,19,19.5,19.6)
• MYOB Premier (12,12.5,19,19.5,19.6)
• MYOB Enterprise (6,6.5,19,19.5,19.6)
 (now known as MYOB AccountRight)

Important note: if you want to set up the Xact Link for ACT! and MYOB in a client-server (network) environment you will need to be running either Premier or Enterprise versions of MYOB.

The Xact Link for ACT! and MYOB also requires that the ODBC direct drivers to be installed on the machine where your MYOB data file and program are installed, these drivers are usually installed by default but if they're not then you will need to install them manually.

now works with
Time & Billing
for ACT!

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

The Xact Link for ACT! and MYOB 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.

This 'front to back office integration' amalgamates customer information (datasets) and brings together disconnected processes – such as the quote to-order and order-to-cash cycle. It's the first ever link for ACT! and MYOB that allows for the creation of quotes, orders and invoices direct from ACT! – creating a complete and accessible customer history for all staff to use.

Where customer data is not integrated effectively, business process are usually punctuated by errors, delays, manual intervention and paperwork. This will impact negatively on overall customer service as well as increase transactional costs on an exponential basis.

But one small link will see ACT! and MYOB Accounting users reaping the benefits of a fully integrated CRM application, enabling them to manage customer relationships more effectively, reduce operating costs, increase profitability and achieve competitive advantage.

XACT®
SOFTWARE SOLUTIONS

How your business will benefit

Eliminate dual entry of records. Immediately populate ACT! with established records from accounts using the Import Wizard, then create and update MYOB contacts from existing ACT! records with the click of a button.

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 quotes, sale 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, such as getting on top of overdue accounts at the time a customer is requesting another order.

The Xact Link for ACT! and MYOB is an ACT! plug-in.

When installed it operates as a Tab within the contact detail view within ACT! and provides a new menu item within the Tools menu. The application can work for multi-user or single user.

View MYOB customer invoices from within ACT!

Create a customer invoices from within ACT! and using a live products list.

View live account summary details and update contact details from within ACT!

Now with the MYOB items list available live to ACT!'s Sales & Opportunities process

No need to import or update manually for each change – ensuring your sales team are always up to date.

Key features of the Xact link

1. Create a connection between your Customer Records in ACT! and their corresponding Cards in MYOB

2. Import MYOB Customer and Supplier Cards into ACT!

3. Create and update Customer Cards directly from ACT!

4. View Customer Card details and Sales History from within ACT!

5. View Aged Receivables from ACT!

6. Create Quotes, Sales Orders and Invoices direct from ACT!

7. Live integration between your MYOB Items List and the ACT! Sales & Opportunities process

8. Convert ACT! Opportunities to MYOB sales documents

9. Create customisable templates that merge both ACT! and MYOB fields

10. Email Invoices, Quotes etc direct from ACT!

11. Full reporting functionality including card reports, integrated lookups and advanced queries using SQL

XACT SOFTWARE SOLUTIONS