ACT! CRM LINK FOR QUICKBOOKS

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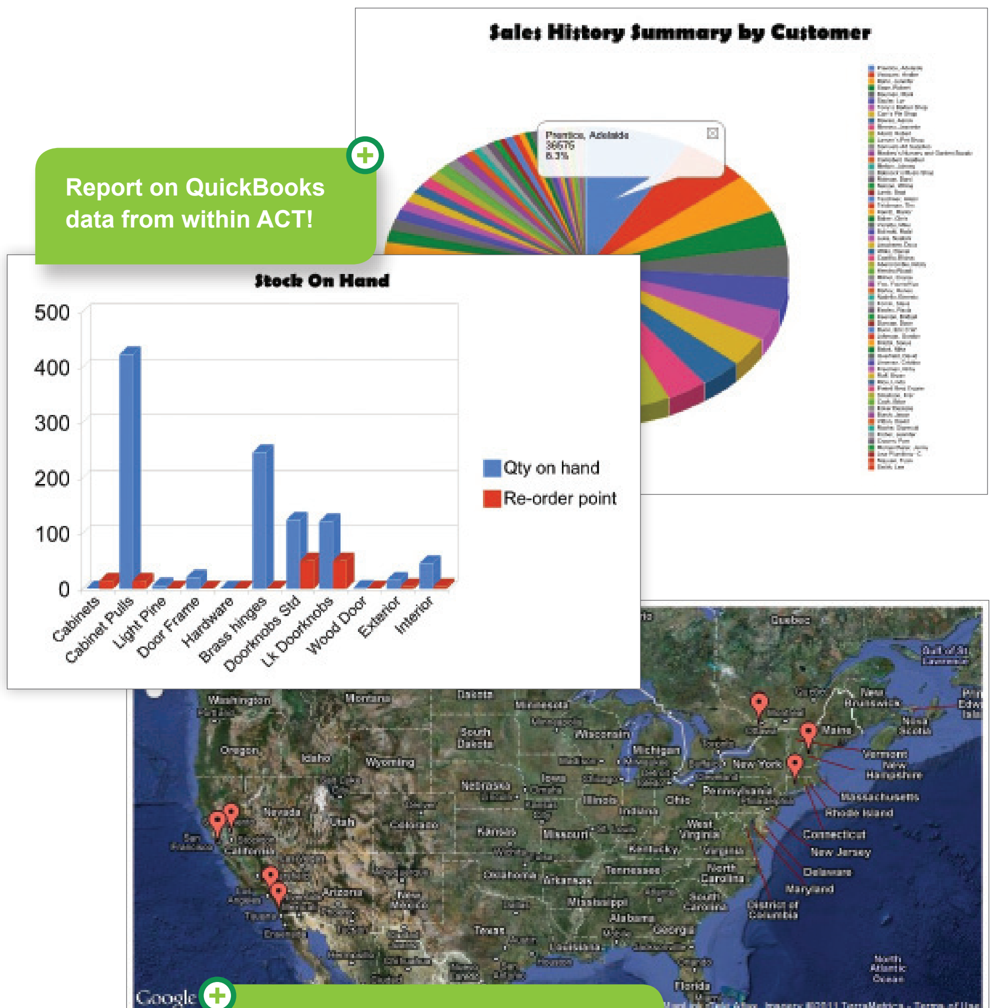
Now see it in action...

Go to: www.xactsoftware.co.nz/xlaq

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



Report on QuickBooks data from within ACT!

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 QuickBooks is compatible with the following versions of ACT! Pro and ACT! Premium (note: the Xact Link for ACT! and QuickBooks 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)

The Xact Link for ACT! and QuickBooks is compatible with the following versions of QuickBooks: QuickBooks Pro, Premier and Enterprise

- 2013
- 2012
- 2011
- 2010

The Xact link form ACT! and QuickBooks is compatible with the following operating systems: 32-bit Windows XP, 32-bit and 64-bit Windows Vista, 32-bit and 64-bit Windows 7. Windows Server 2003 and Windows Server 2008 including Small Business Server.

XACT SOFTWARE SOLUTIONS

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now works with Time & Billing for ACT!

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

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The Xact Link for ACT! and QuickBooks is a simple plug-in application that allows you to combine 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 details 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 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 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 and increase profitability.

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 QuickBooks contacts from existing ACT! records with the click of a button.

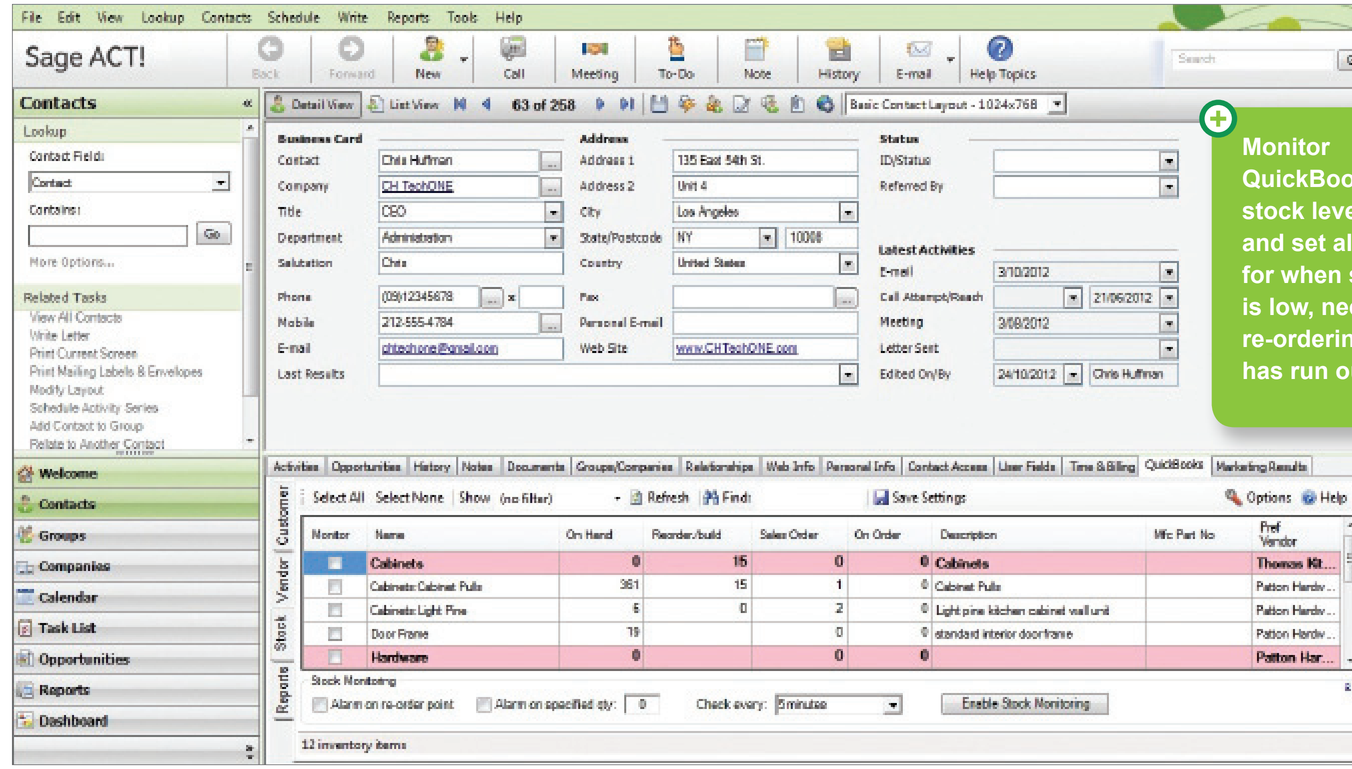
Establish straight-through processing practices between the sales team (front office) and the accounting team (back office). Thus smoothing the sales process, reducing the overhead and inefficiency of passing verbal or written instruction from sales to accounts.

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.

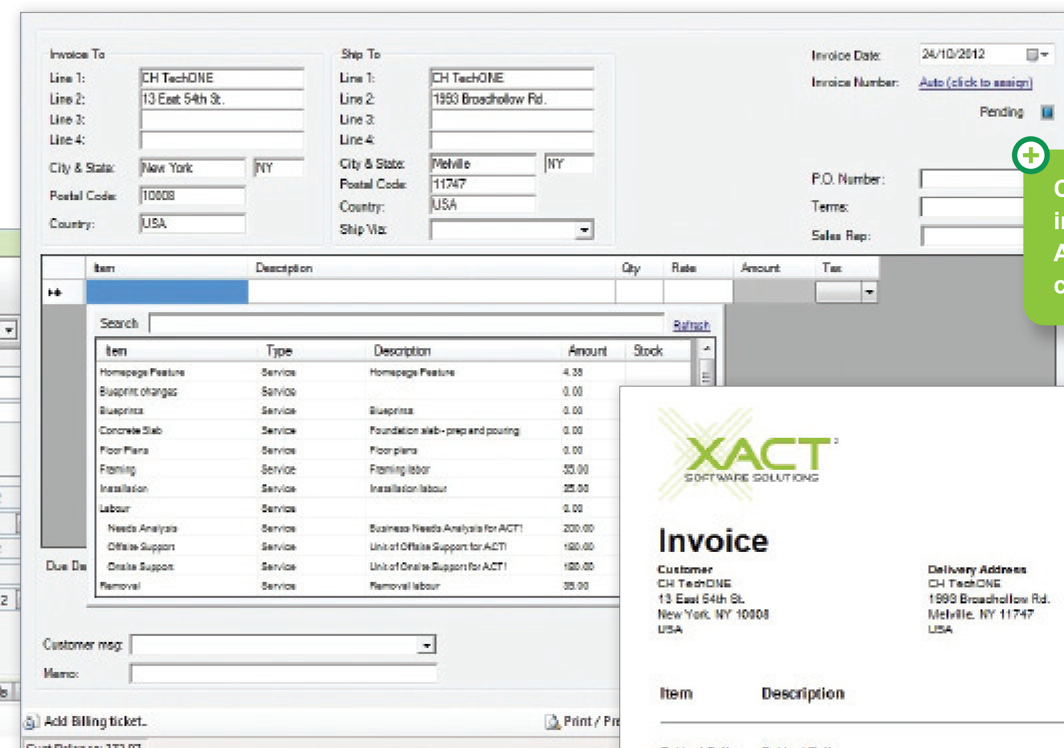
Provide customer facing sales staff with the ability to monitor a customer's account, with aged receivables details (30, 60, 90 day display). Allows sales staff to assist accounts with credit control tasks, such as getting on top of overdue accounts at the time a customer is requesting another order.

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

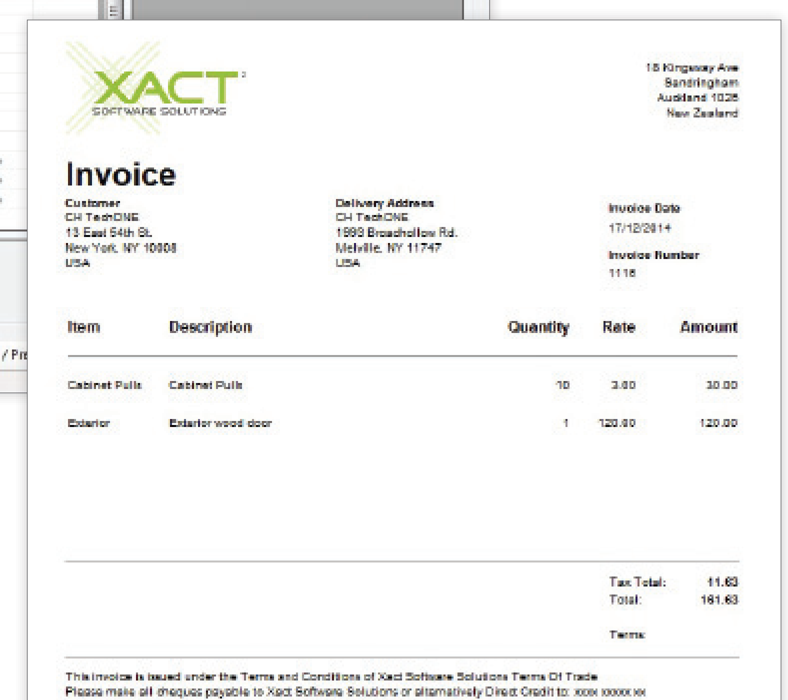
When installed it operates as a Tab within the contact detail view within ACT! and provides a new menu item within the Tools menu. The application can work for multi-user or single user.

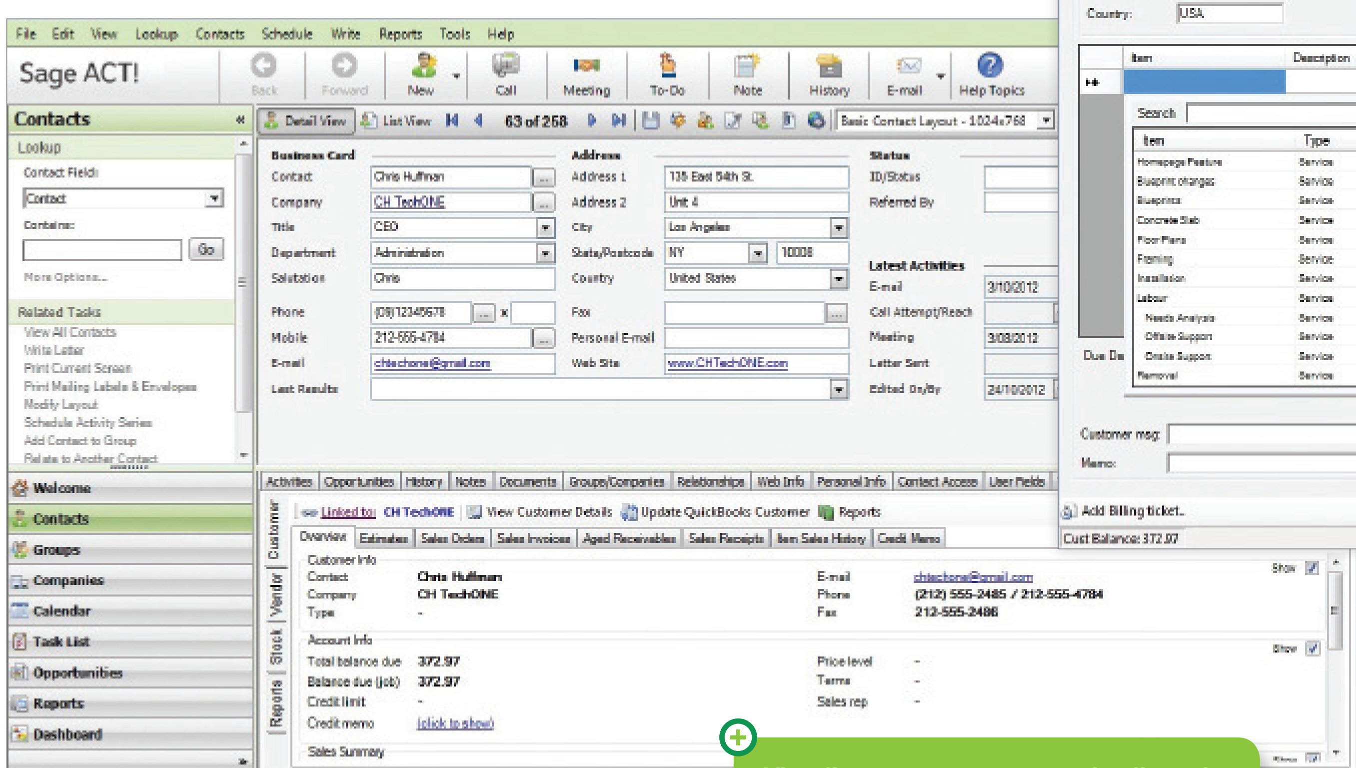


Monitor QuickBooks stock levels and set alarms for when stock is low, needs re-ordering or has run out.



Create a QuickBooks invoice from within ACT! and using custom templates.





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

Key features of the Xact link

1. Create a connection between your Customer Records in ACT! and their corresponding Cards in QuickBooks
2. Import QuickBooks Customer 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 Estimates, Sales Orders, Invoices, Sales Receipts and Credit Memo's direct from ACT!
7. Convert ACT! Opportunities to QuickBooks sales documents
8. Create customizable templates that merge both ACT! and QuickBooks fields
9. Attach Estimates, Invoices and Sales Receipts to the History tab in ACT! and email to your customer as a secure PDF attachment through integration to Outlook
10. View a list of your customers' item sales history and create new transactions based on past sales
11. Link ACT! Contacts to QuickBooks Vendors then view Bills and create Purchase Orders
12. View QuickBooks Stock Level information and set monitoring alarms from within ACT!
13. Report on key Customer Account information from within ACT!
14. Define what QuickBooks operations each ACT! user can perform with User Access Control