ACT! by Sage

ACT! Link for use with QuickBooks® 3.2

With ACT! Link for use with QuickBooks, ACT! users can access QuickBooks information within ACT! via the QuickBooks tab and get a complete view of all customer interactions. From within ACT!, you can see Estimates, Invoices, Sales, and Payments for any linked contact – providing a detailed view of the relationship history.

Eliminate duplicate data entry and save time

It's easy to start using ACT! and QuickBooks together. Simply import QuickBooks customers and vendors into ACT! at one time. This eliminates duplicate data entry, and contacts that you import automatically have a link established. Once you've established customer and vendor information in both programs, you can quickly match and link your ACT! contacts to QuickBooks records. You will receive suggestions based on contact name, company name, and/or phone number, so you can confirm a perfect match. And, you can link multiple ACT! contacts to one QuickBooks customer or vendor record.

If you have contacts in ACT! that aren't in QuickBooks, you can create a new QuickBooks customer or vendor record from an ACT! contact record and automatically establish a link for easy access to information.

Synchronization allows you to always keep customer and vendor information current in both ACT! and QuickBooks. You have the ability to choose the direction of each update – ACT! to QuickBooks, QuickBooks to ACT!, or two-way. When the two-way update is selected, an updated contact in one program automatically generates an update for the other program too.

See all customer and vendor interactions

By linking your ACT! and QuickBooks databases, you can view QuickBooks Accounts Receivable and Payable information for history and details of every transaction with that customer or vendor. This includes Invoices, Estimates, Payments, and Sales information, which can be filtered by date range or transaction type to view the most pertinent information. Need to know the items on the Invoice? Simply drill-down on any of the four types of QuickBooks transactions to view the details.

From within ACT!, you can also utilize QuickBooks Customer Summary for a snapshot of customer status. View balance due information and know whether the customer is in good standing, as well as the dates of the customer's last purchase and last payment. Review a complete history of what your customer has purchased and call when it's time to reorder. Similar information is available for vendors in the Vendor Summary.

Take action using real-time information

With information current in both databases and the ability to view complete customer information, you can take action. Activities can be scheduled in ACT! – for you or any ACT! user in your company – to take action on a QuickBooks transaction (Estimate, Invoice, Sale, Payment) and set an alarm as a reminder.[1] This allows you to easily follow up on an estimate sent or a completed sale. While you're on the phone with a customer, you can easily create an estimate or invoice in ACT!. That estimate or invoice will use the "Next Available"[2] sequential reference number generated by QuickBooks. Once the estimate has been approved or the deal closes, you can quickly convert the estimate into an invoice while still in ACT!.

MAKE CONTACTS. BUILD RELATIONSHIPS. GET RESULTS.

ACT! Link for use with QuickBooks provides a complete view of all customer interactions, so you can be more productive and make more insightful business decisions. By integrating your contact management and accounting applications, you have real-time access to complete customer information for handling inquiries and performing follow-up tasks, and you eliminate duplicate data entry so you can focus on closing more deals.

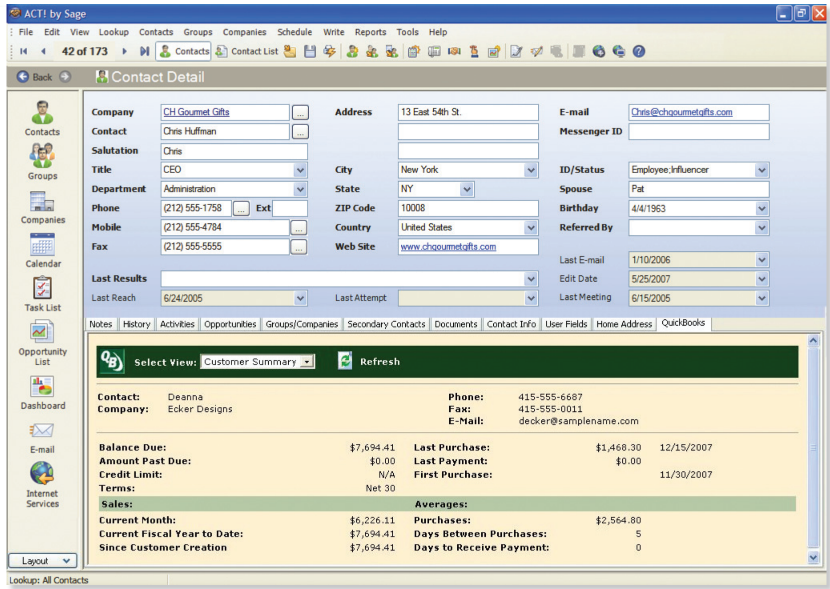
KEY BENEFITS

- View complete QuickBooks customer and vendor information from within ACT!
- Stay on top of bills by tracking vendor status
- Schedule activities in ACT! for QuickBooks transactions that require follow up[3]
- Create an Estimate or Invoice while in ACT!
- Import and update QuickBooks customers and vendors into ACT! at one time
- Create and edit customer and vendor links between QuickBooks and ACT!

1 Users must prompt ACT! to search for new or pending QuickBooks transactions. Activities will then be scheduled.
2 This feature must be activated in QuickBooks.
3 Requires appropriate security permissions in both ACT! and QuickBooks.

For more information about ACT!:

- Call 1-866-795-3711
- 5 users or more?
  Call 1-888-855-5222 for
  Corporate Licensing
- Contact your ACT! Certified Consultant
- Visit www.act.com



View QuickBooks Accounts Receivable information in ACT! and drill down to see transaction details.

Key Capabilities

1. Easily Create Contacts: Create and edit Contacts in ACT! and link them to corresponding records in QuickBooks – and vice versa. Create a customer/vendor in QuickBooks from a current ACT! Contact, or import existing customers/vendors into ACT! from QuickBooks.

2. Schedule Activities: Activities can be scheduled in ACT! for you or for any ACT! user in your company to take action on a QuickBooks transaction (Estimate, Invoice, Sale, Payment) and set an alarm as a reminder.

3. Create Estimates and Invoices: Quickly create a QuickBooks estimate while in ACT! and have the ability to convert it to an invoice. You'll see both the estimate and invoice in the accounts receivable summary.

4. View Customer Summary: View open balances, credit lines, past due balances, sales, and other transactions in the Customer Summary tab.

ACT! Link for use with QuickBooks (QB) 3.2 is compatible with ACT! by Sage 2007 (9.0) and 2008 (10.0); ACT! by Sage Premium for Workgroups 2007 (9.0); and ACT! by Sage Premium 2008 (10.0). If you are upgrading from a prior version of ACT! Link for use with QB, please review the QB version compatibility. ACT! Link for use with QB supports the U.S. version of QB only. ACT! Link for use with QB 3.x is not compatible with Windows Vista™.

About ACT!

The #1 selling contact and customer manager for 20 years, ACT! by Sage enables individuals and teams involved in selling or other contact-driven roles to improve productivity by helping them organize contact information, manage daily responsibilities, and communicate more effectively. With contact details at their fingertips, they can focus on what's important to their business - building stronger customer relationships. ACT! is easy to learn and use, customizable, and affordable for small businesses. With more than 2.7 million individual users and 41,000 corporate accounts in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.

SAGE 360°

End-to-end solutions. Expert advice. Premium support. That's Sage 360°.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

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Your business in mind.

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