



## ACT! Link for use with QuickBooks® 4.0

ACT! Link for use with QuickBooks 4.0 delivers a complete view of all customer interactions so users can be more productive and make more insightful business decisions. It provides ACT! users with access to QuickBooks information from within ACT! via the QuickBooks tab. ACT! users can view estimates, invoices, sales, and payments for any linked contact for a more detailed understanding of their relationship history.

By integrating contact management and accounting applications, users have real-time access to complete customer information, which speeds inquiry handling and follow-up. It eliminates duplicate data entry, reducing errors and saving time.

### Centralize information for a snapshot of interactions

With ACT! Link for use with QuickBooks, users can utilize the QuickBooks Customer Summary for a snapshot of customer status. Users can quickly get a transaction summary while on the phone with a customer or vendor, including invoices sent and payments received, without having to call accounting staff for the information. This reduces call time and callbacks, improves customer service, and frees accounting staff time. And, accounts receivable information can be filtered by date range or transaction type to view the most pertinent information.

You can also see when a customer made their last purchase and their last payment so you know when it's time to call them to ask for a reorder. And, you can quickly identify your "top" customers by seeing, on average, how long it takes your customers to pay their bills, how frequently they order, or their average order amount.

Easily manage vendors by tracking their status in ACT! Link for use with QuickBooks. View bill summaries to understand what's been paid and what's due, so your vendors are always paid on time. You can also identify your "best" vendors by seeing which you use most frequently.

### Drill down into transaction types for complete customer or vendor views

With ACT! Link for use with QuickBooks, users can view QuickBooks Accounts Receivable information for history and details of every transaction from within ACT!. See invoices, estimates, payments, and sales. You can drill down into any of these transaction types to view further detail.

### Leverage ACT! capabilities to stay on top of your responsibilities

ACT! Link for use with QuickBooks allows you to schedule activities<sup>1</sup> and alarms in ACT! to remind you to take action on a QuickBooks transaction, to improve customer service, or keep on top of past due invoices. You can even prompt ACT! to check for new QuickBooks transactions and schedule activities accordingly. And, when reminded by ACT! to take action, you can drill down into QuickBooks transaction details directly from ACT!.

You can quickly and easily create accurate, timely invoices or estimates in ACT! by either using the "Next Available" sequential reference number<sup>2</sup> generated by QuickBooks or by using the QuickBooks product list and tax table. You can also convert estimates into invoices from within ACT! to save time and ensure accuracy.

## MAKE CONTACT. 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. This helps you effectively handle inquiries and perform follow-up tasks. It eliminates duplicate data entry so you can focus on closing more deals.

## KEY BENEFITS

Centralize information for a complete snapshot of customer and vendor interactions

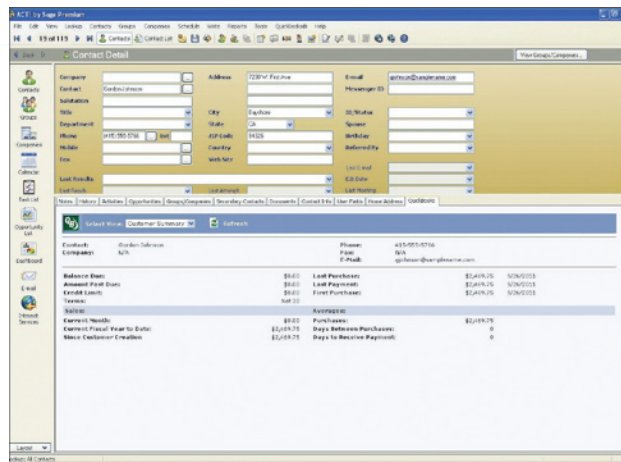
Drill down into any transaction type for a complete customer or vendor view

Leverage ACT! capabilities to stay on top of your responsibilities

Eliminate duplicate data entry and save time when you link ACT! and QuickBooks and share contact information between applications

**For more information about ACT! Link for use with QuickBooks:**

- Call 1-866-903-0006
- Contact your ACT! Certified Consultant
- Visit [www.act.com](http://www.act.com)



**Eliminate duplicate data entry and save time**

Import your QuickBooks customers or vendors into ACT! to eliminate dual entry and reduce errors. Use quick synchronization to keep customer and vendor information current in ACT! or QuickBooks. Choose the direction of each update—ACT! to QuickBooks, QuickBooks to ACT!, or two-way. When contacts are linked<sup>3</sup> between ACT! and QuickBooks and two-way update is selected, an update in one application also gets updated in the other. You can also update all contact links at one time and confirm any changes before they become effective.

You can create and edit customer and vendor links<sup>3</sup> between QuickBooks and ACT! to save time and ensure accuracy. Quickly link your ACT! contacts to QuickBooks records—even receive suggestions based on contact name, company name, and/or phone number so you can confirm an accurate match. You can also match ACT! contacts with customers and vendors that already exist in QuickBooks, and link multiple ACT! contacts to a QuickBooks customer or vendor record.

- 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 No more than one ACT! database should be linked to a QuickBooks database at any given time. See Usage Recommendations for additional information.

**Important Note:** ACT! Link for use with QuickBooks 4.0 is not compatible with ACT! Premium for Web, ACT! for Palm OS, ACT! Link for Palm OS, or ACT! Link for Pocket PC.

**Important Note to Upgraders:** If you are upgrading from a prior version of the ACT! Link for use with QuickBooks, please review the QuickBooks version compatibility. Also, if you are upgrading from ACT! Link 1.0, you will lose your links between ACT! and QuickBooks and need to re-establish them. If you are upgrading from ACT! Link 2.0 or ACT! Link for use with QuickBooks 3.x, your links will remain intact once you upgrade. If you are upgrading from ACT! Link for use with QuickBooks 3.x, you must have ACT! 10.0.3 or later installed prior to upgrading to ACT! Link for use with QuickBooks 4.0. After the upgrade, your links will remain intact but must be updated.

**About ACT!**

The #1 selling contact and customer manager for over 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 2.8 million individual users and 43,000 corporate customers in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.



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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