

Workflow is the automation of specific business processes or tasks, such as document management, to improve overall productivity. Organizations undertake CRM customization initiatives to ultimately improve sales processes... to administer workflow rules that more effectively govern the sales process.

Tailor-Made CRM 5/09
Aberdeen Group

The screenshot shows a web-based job sheet form. At the top, it displays the XACT logo and 'XACT SOFTWARE SOLUTIONS'. The form includes fields for 'Company' (Acme Rockets Industries), 'Phone' (0 377 6516), 'Date' (20/09/2009), and 'Master Sheet' (None). There are also fields for 'Time In', 'Time Out', 'Actual Time', 'Travel', and 'Parking Units'. Below these are sections for 'Location', 'Job Type' (with checkboxes for Hourly, Meter, etc.), 'Software Supplied' (with dropdowns for Full, Premium, etc.), and 'Title' (ACT! Essentials, etc.). A 'Job Summary' section contains text describing the installation of ACT! 2009 on a PC. At the bottom, there is a 'Submit Job Sheet' button.

Jobsheets online – enabling the work to flow...
At Xact Software our consultants log work details directly into an ACT! web portal from the customer's site. It has eliminated a paper-based system and monthly paper-chase. A customizable HTML template saves the uniquely numbered work record against the customer in ACT! *Automatically* the accounts person receives an email alert that a work sheet has been filed in ACT! and ACT! Keyword Search quickly finds it, ready to create the invoice in the accounting system. Work completed, recorded in ACT!, invoiced and no paper. Accessible from a web-browser or web-enabled device. The form can be customized to suit any business.

For more information and examples of our software development work, please visit our website at xactsoftware.co.nz/development.html

About us

Xact Software Solutions is a privately owned, New Zealand based company.

An ACT! Consultant company since 2000 with software development skills specializing in ACT! custom-development and developing linking applications to common accounting products.

Dedicated to improving workflow for ACT! and enabling it to compete with more expensive CRM solutions through front office to back office connectivity.

Provides ACT! enhancements for a diverse range of business types including financial services, manufacturing, public service sector and private small to medium organizations.

Employs developers skilled in .Net, php and Java.

An approved 'Professional MYOB Developer' (for the Xact Link for ACT! and MYOB add-on product).

With our indepth knowledge on the complete ACT! product range and add-on software packages, we provide the high quality advice and service that continues to make ACT! a popular choice for small to medium business.

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XACTTM

SOFTWARE SOLUTIONS



Not all businesses are the same, so we'll customize ACT! to meet their needs.

At Xact Software Solutions our in-house developers specialize in enhancing the capabilities of ACT! so that your clients benefit from a software application that is tailored to their specific requirements.

In providing unique, flexible and innovative enhancements, your ACT! clients do not have to be constrained by the 'out of the box' product. Nor are they limited to the feature set that is provided by the Custom Table Designer type of software add-on.

We can adapt and customize ACT!'s features and functions, connect ACT! to other applications and include other data sources without being constrained by a fixed assignment of a custom table to any particular ACT! entity. Such enhancements can provide a fast and cost-effective CRM solution that competes with far more expensive mid-range CRM applications.

A custom development from Xact Software is site-specific and the number of users does not determine the price. So tailoring ACT! directly can be an extremely cost effective option for larger sites.

Best-in-Class companies implement customization initiatives to ensure that the CRM system mirrors their unique business processes and needs.

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Custom solutions we've created to enhance the effectiveness of ACT!

The Xact Software range of accounting Links for ACT!:

- The Xact Link for ACT! and MYOB
- The Xact Link for ACT! and QuickBooks

Workflow products for ACT!

Web portals for ACT!

Customized ACT! solutions through ACT! SDK development

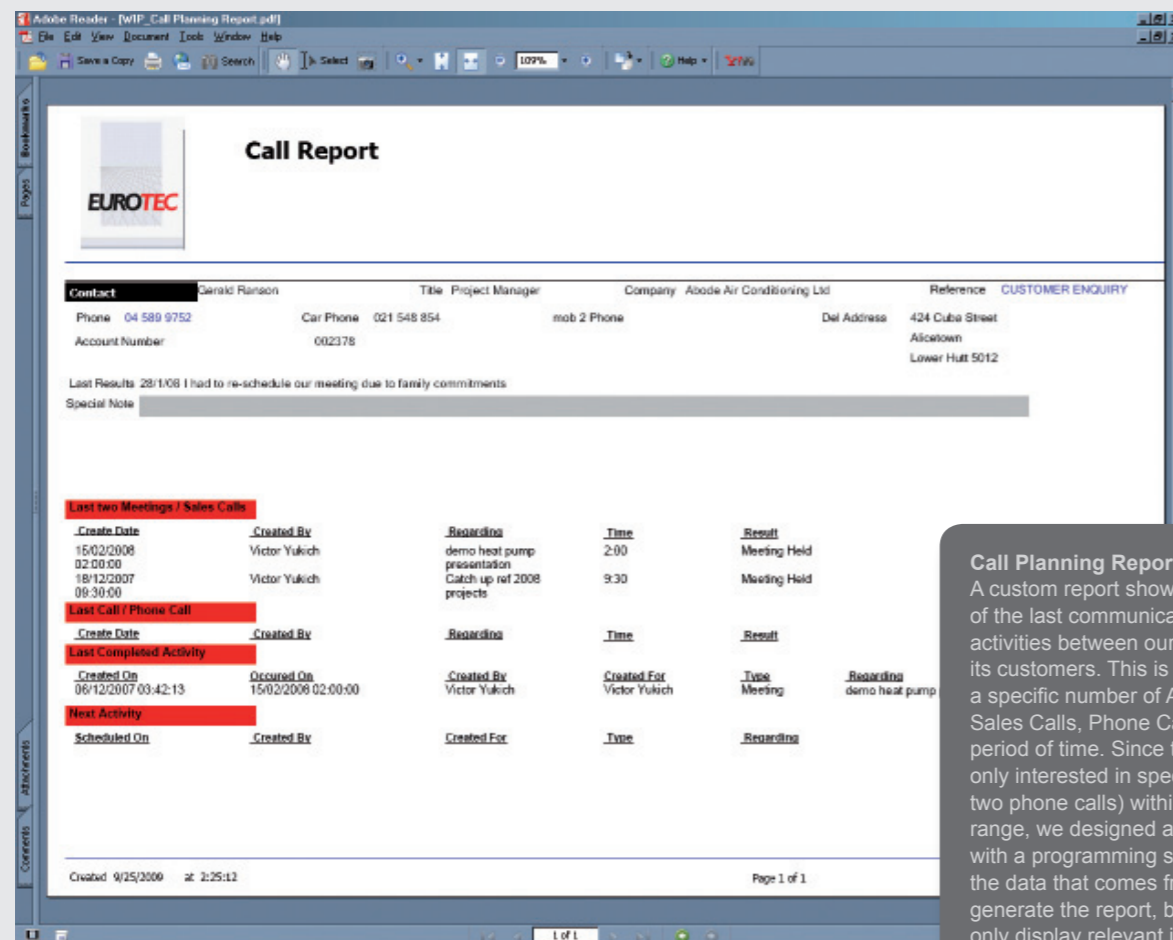
Customized ACT! reports and working with SQL Reporting Services

Using web services allows ACT! to provide business-to-business information sharing

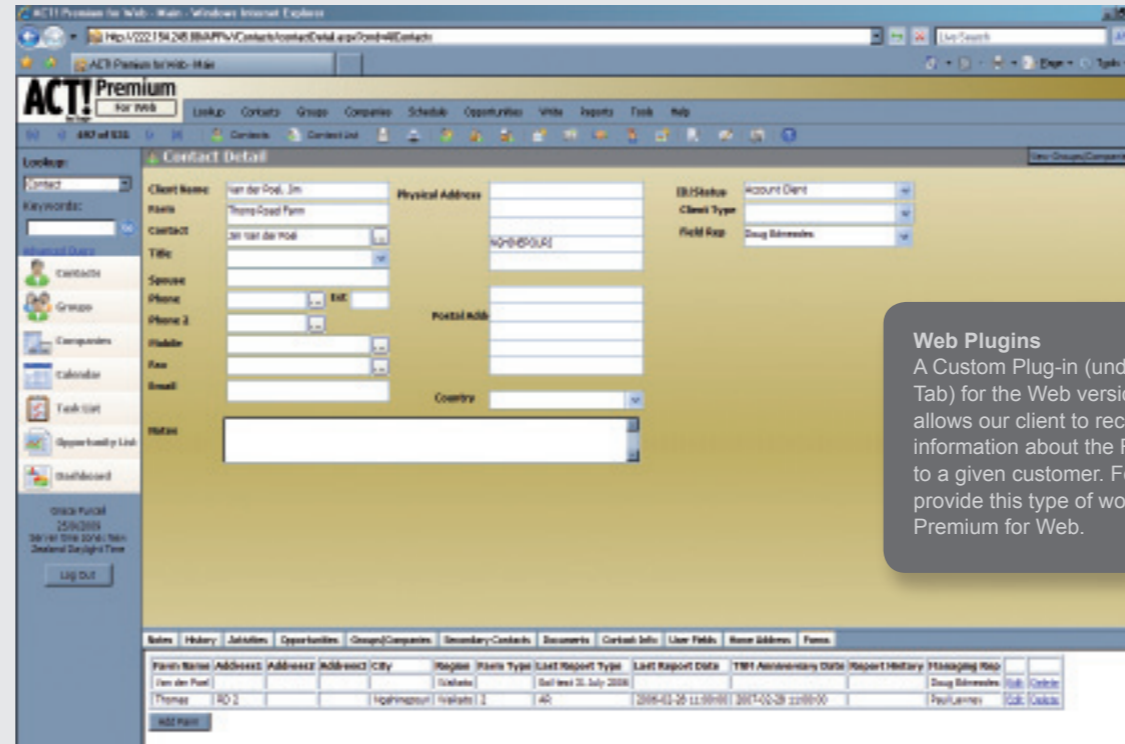
Enabling dashboard reporting facility in ACT! using external data sources

For 47% of Best-in-Class companies, customizing a CRM or Sales Force Automation (SFA) solution to match business processes is a top two strategic action for success, and thus considered a *necessity*.

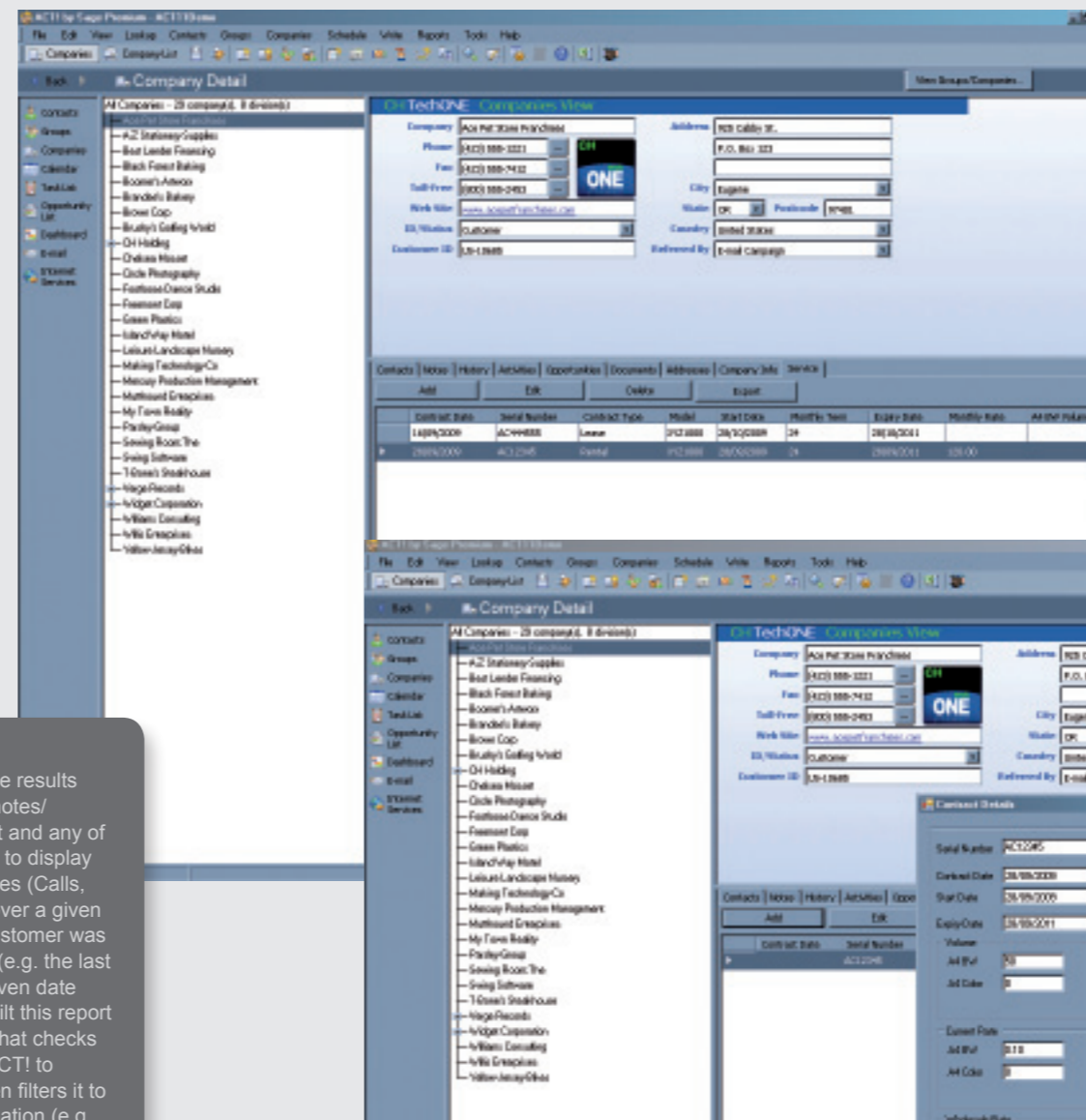
The 2009 Sales Automation Report. Aberdeen Group



Call Planning Report
A custom report showing the results of the last communication/notes/activities between our client and any of its customers. This is setup to display a specific number of Activities (Calls, Sales Calls, Phone Calls) over a given period of time. Since the customer was only interested in specifics (e.g. the last two phone calls) within a given date range, we designed and built this report with a programming script that checks the data that comes from ACT! to generate the report, but then filters it to only display relevant information (e.g. the last two meetings in October).



Web Plugins
A Custom Plug-in (under the Farms Tab) for the Web version of ACT! This allows our client to record and track the information about the Farms that belong to a given customer. Few developers provide this type of work for ACT! Premium for Web.



Custom Table Service Contacts
A custom Tab (Service) created within the ACT! companies entity for a client wishing to keep track of the rental of printers and copy machines, and the service history of each, against a given customer. By default ACT! does not have the ability to track this type of information. This solution also allows for data to be exported to Excel to easily graph and chart the results.

Benefits of working with Xact Software Solutions

A custom development from Xact Software is site-specific and the number of users does not determine the price.

Take advantage of exchange rate differences NZ\$ vs US\$ for competitive rates.

Receive a quick turn-around of smaller projects with the time zones working in your favor. Your development is proceeding to be available for your next business day.

We can access your client's site via remote utilities for add-on setup which makes distance from the customer irrelevant. Much of our work of installation, maintenance and user training is provided via remote connection to the customer's site.