



Xact Link for ACT! & MYOB EXO

Features & Benefits

The new MYOB EXO addon for ACT! offers larger organisations a more comprehensive workflow solution for streamlining sales, marketing and accounting information.

ACT! + the Xact MYOB EXO addon combines sales and marketing data about your prospects and customers with important account information – *LIVE*. No synchronisation, no delays. The result is a centralised database that offers a complete view of your contacts, activities, sales opportunities and overall business performance.

Such intuitive integration eliminates errors, delays, manual intervention and additional paperwork typically associated with multiple databases, allowing your staff to focus on what is important – building relationships and getting results.

Current features list:

- Import existing MYOB EXO debtor contacts into ACT!
- Link one or multiple ACT! contacts to a debtor contact in MYOB EXO
- Create debtor accounts and debtor contacts from within ACT!
- Update debtor contact details from ACT!
- View account summary statistics, and choose which MYOB EXO fields to display
- View quotes, orders, invoices and payments from ACT!
- Raise and edit quotes from ACT!
- Convert an ACT! Opportunity to a MYOB EXO Quote
- Access the MYOB EXO stock list direct from the ACT! Opportunities view
- Email or print any type of Order or Opportunity using highly customisable templates
- Works with MYOB EXO pricing rules and policies

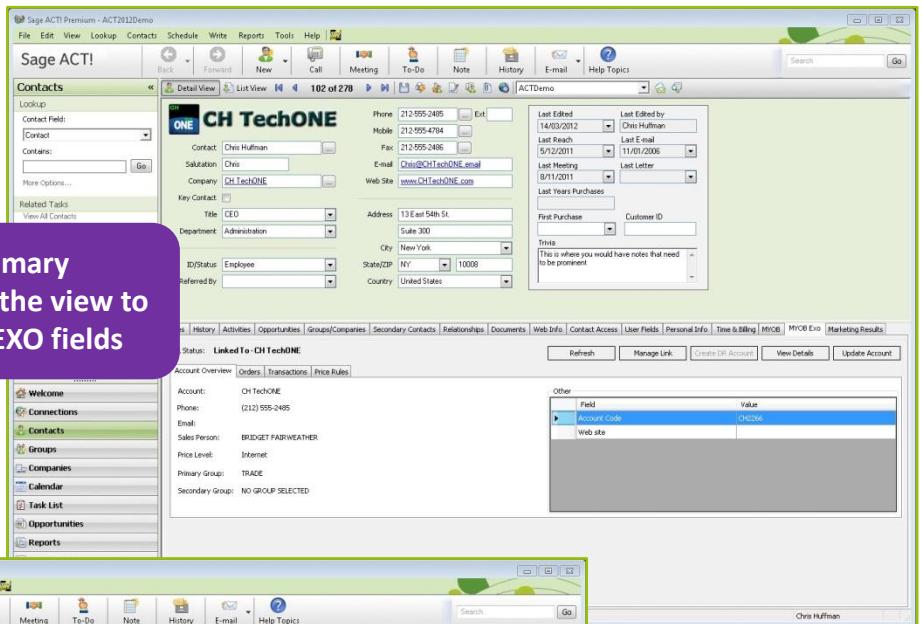
The MYOB EXO integration with ACT! is continuously evolving to meet the specific needs of its users. We consider all feedback about how this product can be improved and will continue to add functionality incrementally throughout the life of the product.

Product roadmap:

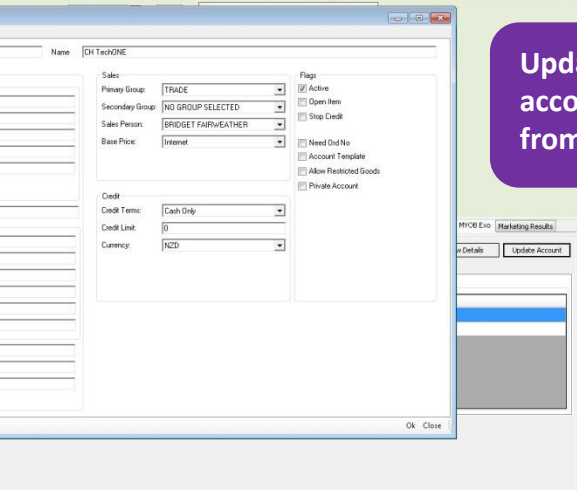
Future development for the product is listed below; please note this is subject to change:

- User access model
- Full access to transactional process
- Item sales history
- Reporting functionality

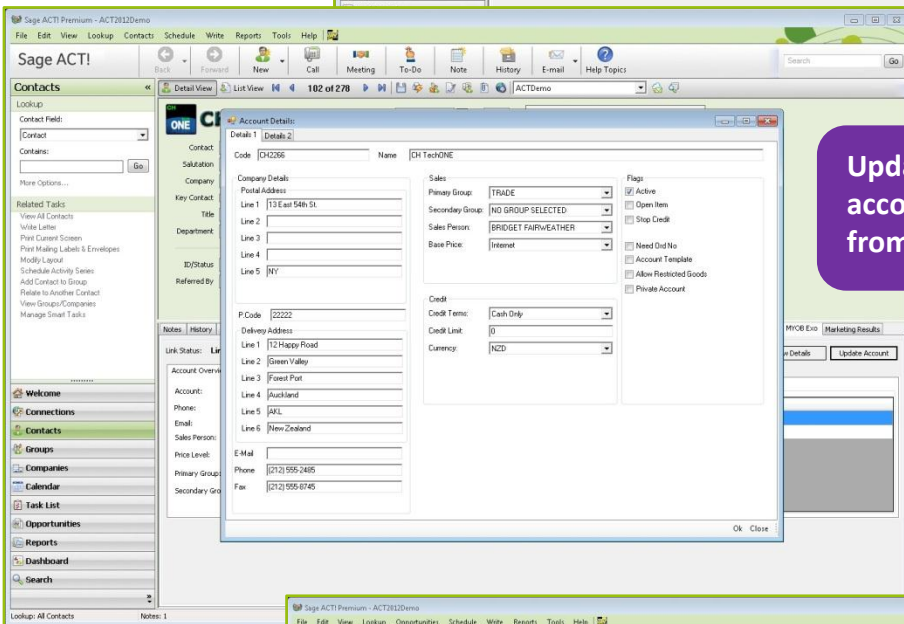




View live account summary details and customise the view to show relevant MYOB EXO fields



Update MYOB EXO account details directly from within ACT!



View current stock list and pricing according to relevant price rules when you raise or modify an opportunity or quote in ACT!

