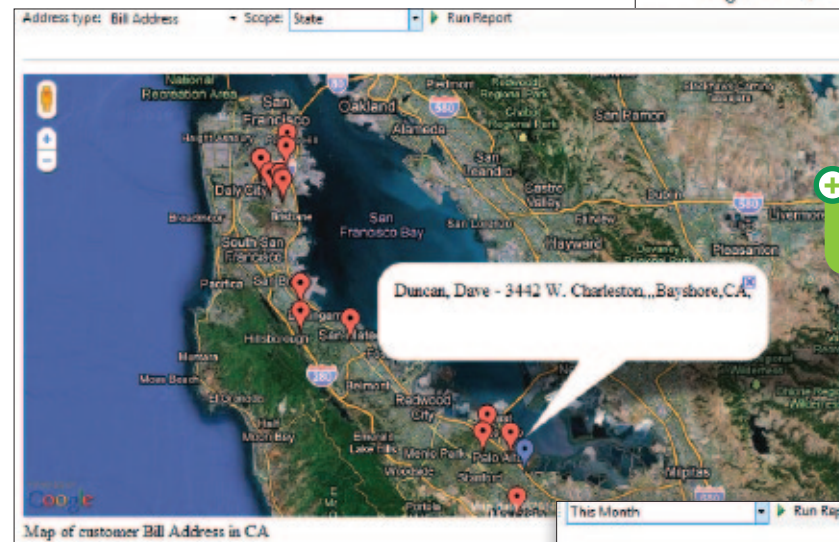


## NEW EDITION

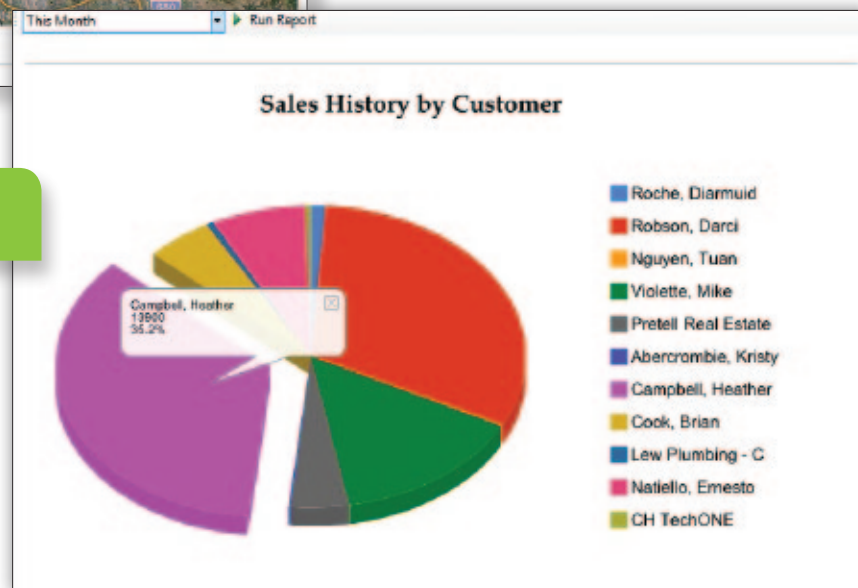
Unlock the valuable sales information and change the way you view your business.



Advise



Locate



Inform

Effective sales people need easy access to sales data. The Xact Link for ACT! and QuickBooks is the key.

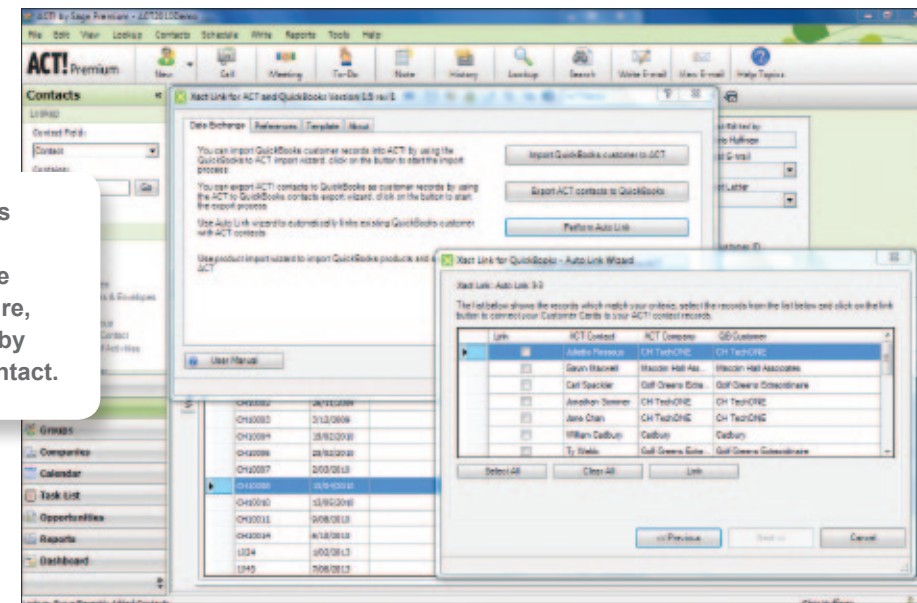
# XACT<sup>®</sup>

## LINKFORACT!

and QuickBooks<sup>®</sup>

### Now see it in action

For a demonstration of the Xact Link for ACT! and QuickBooks go to: [www.actforqb.com](http://www.actforqb.com)



Import QuickBooks customer records into ACT! using the 'auto-linking' feature, matching records by company or by contact.

### DOWNLOAD FREE 30 DAY TRIAL

Pricing of the full license is detailed on our website

The application is easy to install direct from our website. Please check that you have the relevant system requirements and correct versions of ACT! and QuickBooks before you download the link.

**System requirements**  
The Xact Link for ACT! and QuickBooks has the same system requirements as ACT!

**Compatibility**  
The Xact Link for ACT! and QuickBooks is compatible with the following versions of ACT!:  
(the link is compatible with Standard, Pro and Premium versions)  
• ACT! 2007 • ACT! 2008 • ACT! 2009 • ACT! 2010 • ACT! 2011 • ACT! 2012  
Note: The link is not compatible with ACT! Premium for Web

The Xact Link for ACT! and QuickBooks is compatible with both Pro and Premium products of the following versions of QuickBooks:  
• QuickBooks 2004 • QuickBooks 2005 • QuickBooks 2006 • QuickBooks 2007  
• QuickBooks 2008 • QuickBooks 2009 • QuickBooks 2010 • QuickBooks 2011

The Xact Link for ACT! and QuickBooks is compatible with Windows XP, Windows Vista, Windows 7 and 64bit Windows Operating Systems.  
Note: Although the link is compatible with 64 bit Windows and Windows Vista, some versions of ACT! may not be compatible, please consult your ACT! documentation or ask your ACT! consultant for details.

The Xact Link for Act! and QuickBooks will be submitted to QuickBooks for Technical Review.



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# XACT<sup>®</sup>

## LINKFORACT!

and QuickBooks<sup>®</sup>

now works with Time & Billing for ACT!



### Turn your business processes into profit with one small link

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

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



# How your business will benefit

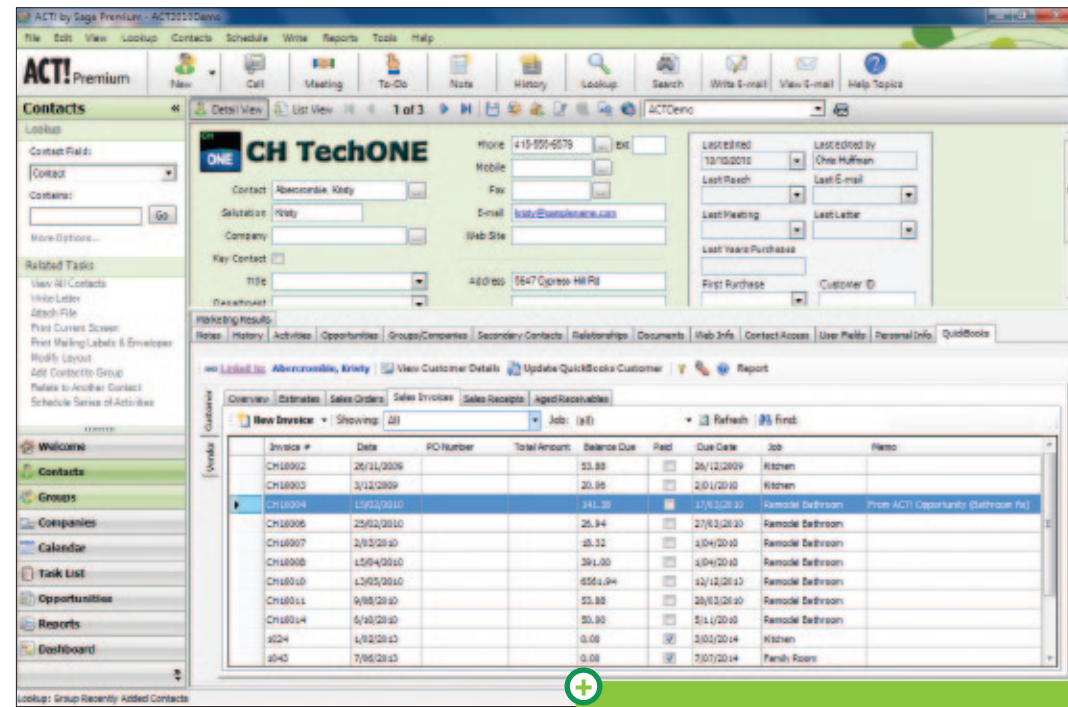
**Eliminate dual entry of records.** Import QuickBooks account records, in bulk, or individually into ACT! to immediately populate ACT! with established records from accounts. A link is created between the ACT! record and the QuickBooks record so that updating from either application is simple.

**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.

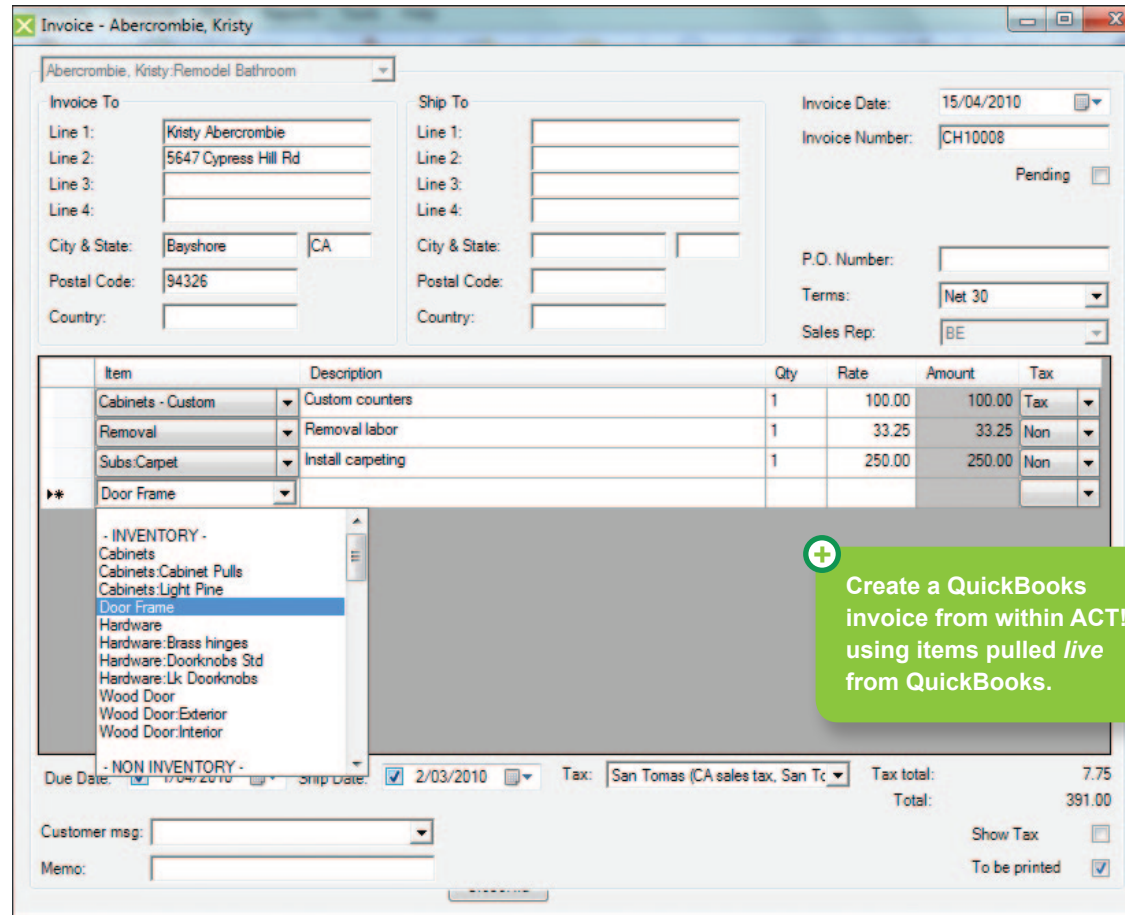
**Enable sales and administration staff to create estimates, orders and invoices** from the front office. Ease the load on accounting staff and empower the sales team to complete sale documentation independently. This process does not compromise the integrity of accounting processes that should remain 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 and getting on top of overdue accounts at the time a customer is on the phone requesting another order.

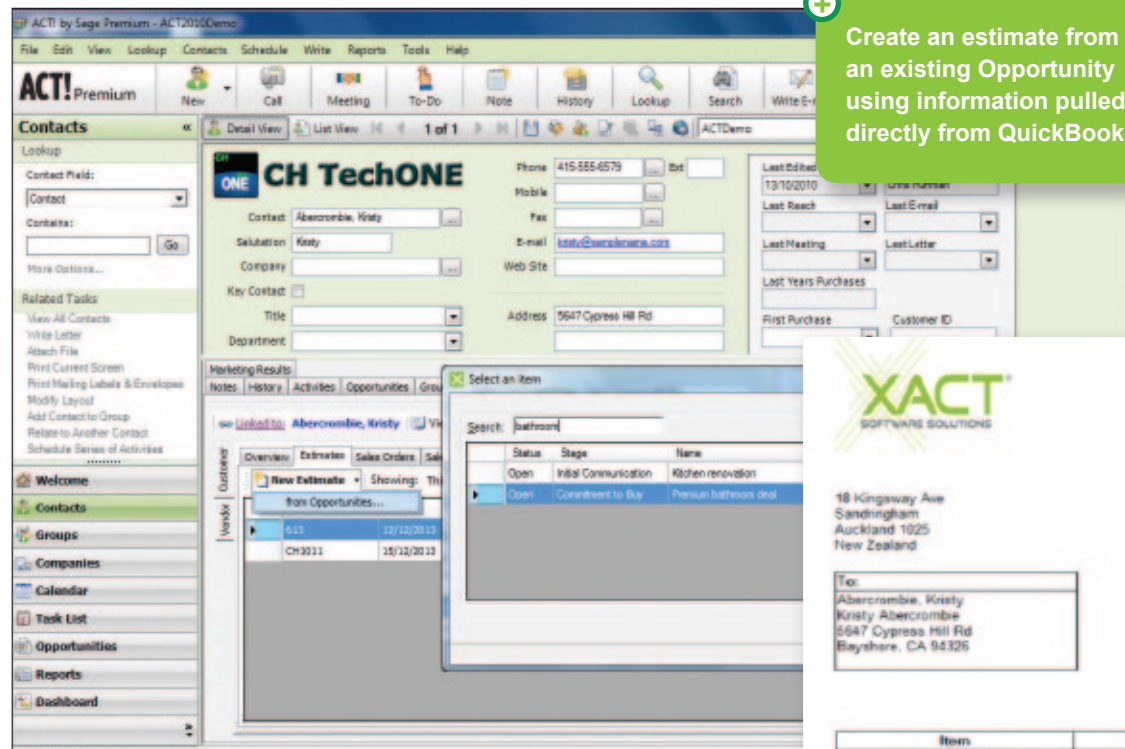
The Xact link for ACT! and QuickBooks is an ACT! plug-in. When installed it operates as a Tab within the contact detail view within ACT! In addition it provides a new menu item within the Tools menu in ACT! The application can work for multi-user or single user.



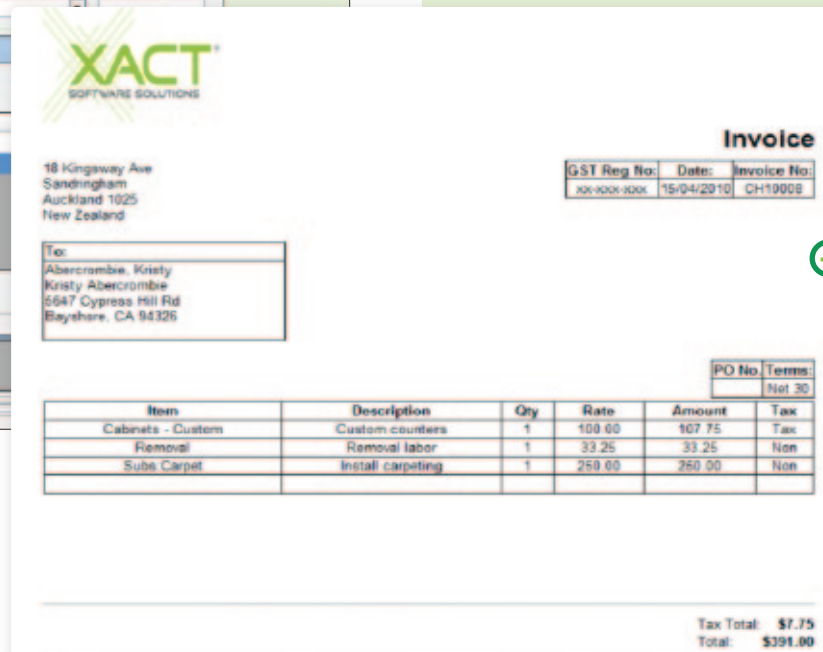
Estimates, Sales Orders, Sales Receipts, Invoices and Aged Receivables can be viewed from within ACT!



Create a QuickBooks invoice from within ACT! using items pulled live from QuickBooks.



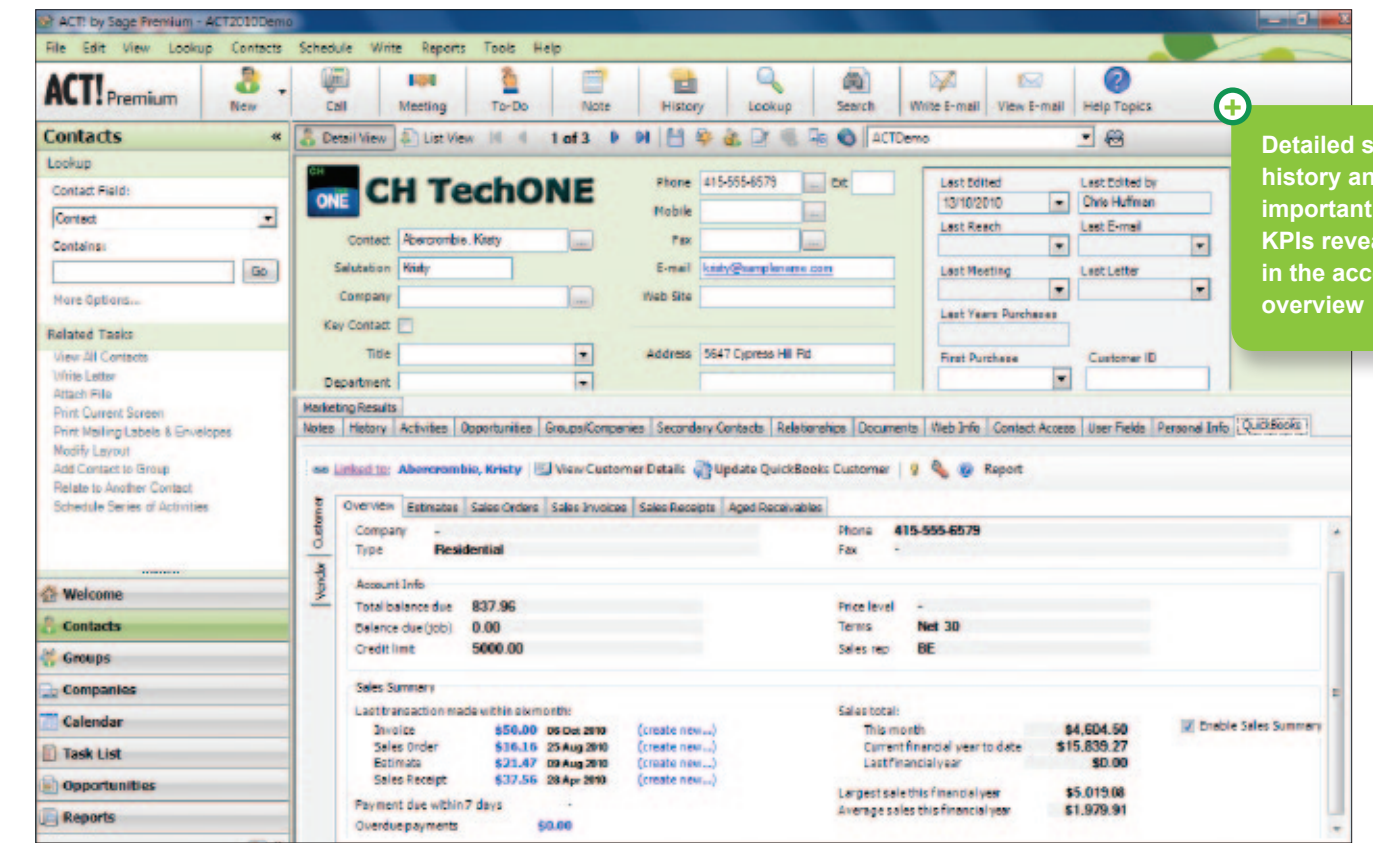
Create an estimate from an existing Opportunity using information pulled directly from QuickBooks.



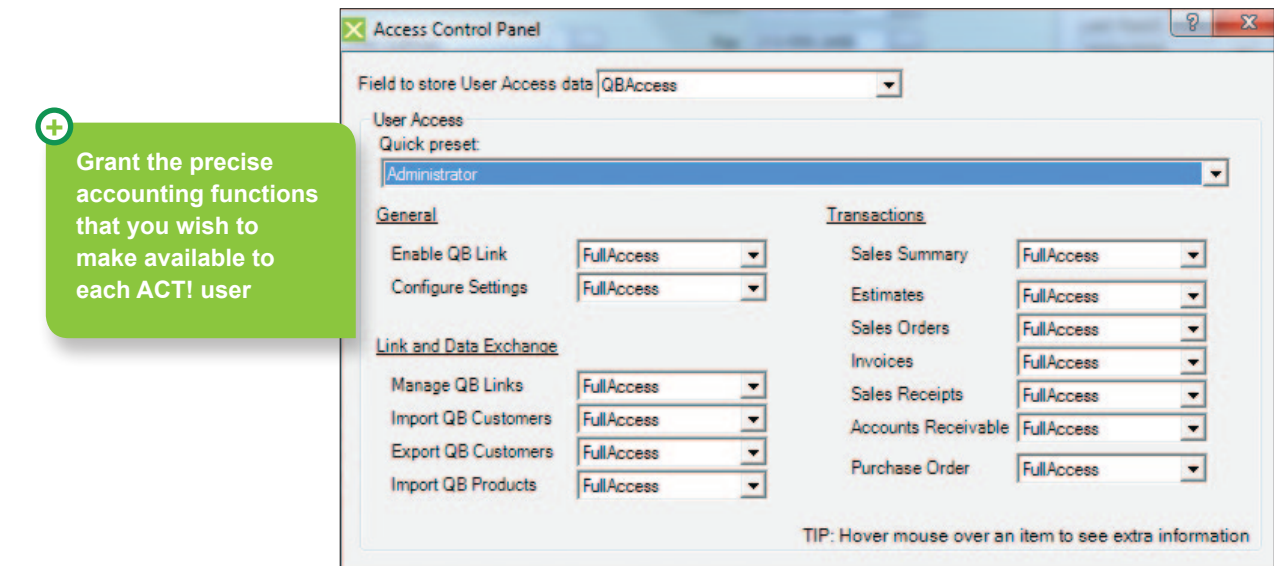
Attach estimates and invoices to the History in ACT! and simply email to your customer directly as a pdf attachment.

# Key features of the link

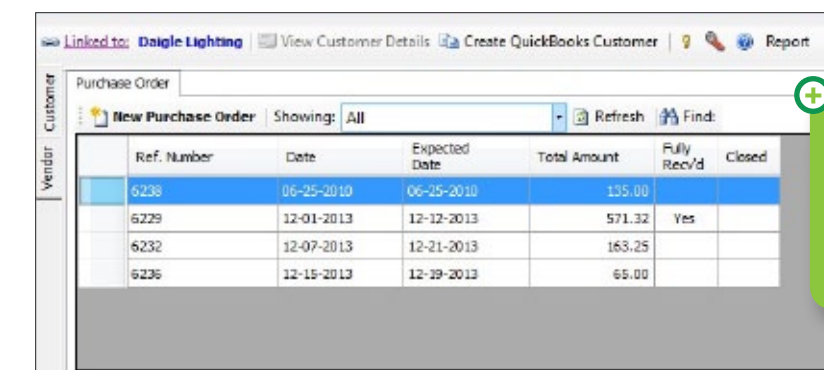
1. Import QuickBooks customer records into ACT! using the 'auto-linking' feature, matching records by company or by contact.
2. Export and link ACT! contact records as customer records in QuickBooks.
3. Update QuickBooks customer details from within ACT!
4. Create a new customer record in QuickBooks from an ACT! record with the click of a button.
5. Attach estimates, invoices and sales receipts to History tab in ACT! and email to your customer as a secure pdf attachment through integration to Outlook.
6. Create estimates, sales orders, sales receipts and invoices from within ACT!
7. Save estimates, orders, sales receipts and invoices from QuickBooks against the ACT! record.
8. View aged receivables from ACT!
9. Link to your vendors in QuickBooks and create or view purchase orders.
10. Key sales statistics and history such as YTD and Average Sales drawn live from QuickBooks.
11. Integrated with the ACT! Opportunities and Sales process. You can prepare an estimate for your prospects from ACT! using the up-to-date Item List from QuickBooks so that you and your sales staff are quoting with accurate information across the organisation.
12. Access control feature to define precisely what QuickBooks operations individual ACT! users can perform from ACT!



Detailed sales history and important KPIs revealed in the account overview



Grant the precise accounting functions that you wish to make available to each ACT! user



Link an ACT! record to a vendor in QuickBooks to create and view purchase orders

The complete solution for optimising workflow and increasing operating efficiency