

XACT™

LINKFORACT!

and QuickBooks

New and improved reports

- **Improved! Item sales history report:** In addition to date range, users can now filter results by sales item and customer.
- **New! Aged receivables report:** View all of the current and overdue invoices direct from QuickBooks, including invoices of customers who are not linked to a record in ACT!
- **New! Sales activity report:** Segment customers based on sales history. Users can choose to report on active or inactive customers and filter the results by document type, value and time.
- **Improved! Sales history summary:** Users can now select how results of the sales history summary are displayed; as a pie chart, column chart or table.
- **New! Customer group report:** Run and perform lookups based on account information such as Customer Type, Sales Terms and Sales Rep then add these contacts to a group in ACT! for future reference.

On-demand connection mode

On-demand connection allows users with the local connection type to close QuickBooks without closing ACT! first. *Note:* whilst QuickBooks is closed the QuickBooks tab in ACT! will not be operational.

Regular update checker

The Xact link for ACT! and QuickBooks automatically checks for updates every month and can download and start installing the latest version with the click of a button.

Link for ACT! and QuickBooks – Lite

The Xact Link for ACT! and QuickBooks defaults to the *Lite* version after the 30 day trial period and provides users with read-only access to QuickBooks accounting data from within ACT!.

With the *Lite* version users can:

- Create new QuickBooks records from ACT! records
- View account information, sales documents and aged receivables
- Run the customer list and stock on hand reports

Improved field mapping and linking

In this latest update, users are able to import customer type, sales rep, terms, price level and preferred payment method details into ACT!

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XACT®
SOFTWARE SOLUTIONS

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

The image displays three overlapping screenshots of the Sage ACT! software interface, demonstrating its capabilities for sales analysis. Each screenshot is accompanied by a green callout box with a plus sign and a label.

- Identify:** The top screenshot shows a 'Customer List' table with columns for Name, Company, Contact, Phone, Email, Type, and Sales Term. A green callout box with a plus sign and the word 'Identify' is positioned to the right.
- Advise:** The middle screenshot shows a 'Sales History' table with columns for Item, Qty, Name, Date, and Trans #. A green callout box with a plus sign and the word 'Advise' is positioned to the left.
- Inform:** The bottom screenshot shows a 'Sales History Summary by Customer' bar chart. The y-axis represents sales volume from 0 to 40,000. The x-axis lists various customers. A green callout box with a plus sign and the word 'Inform' is positioned to the right.

The Xact Link for ACT! and QuickBooks is the key.

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