



SAGE BUSINESSWORKS

SAGE BUSINESSWORKS ACT! LINK

ACT! BY SAGE BENEFITS

- Organize your contact data in one place
- Stay in touch to grow business relationships
- Prioritize your work
- Forecast and track sales opportunities
- Get a complete view of customer interactions
- Take critical information on the go

USING ACT! WITH SAGE BUSINESSWORKS

- Synchronize customer and vendor data with ACT! contact information
- Launch accounting tasks such as Maintain Purchase Order or Maintain Sales Orders from within ACT!
- Customize data mapping between ACT! and Sage BusinessWorks
- Keep a history of accounting transactions in ACT!
- Task accessibility based on Sage BusinessWorks security

MINIMUM REQUIREMENTS

- Sage BusinessWorks v6 or higher
 - Accounts Receivable or Accounts Payable module required
 - Order Entry or Inventory Control and Purchasing modules optional
- ACT! by Sage 2005 or ACT! by Sage Premium for Workgroups 2005 or higher



Increase Customer Satisfaction, Efficiency, and Profitability with the New Sage BusinessWorks ACT! Link

In today's highly competitive business environment, it is of paramount importance to cultivate and maintain the best possible customer and vendor relationships. To help you achieve that goal, Sage Software has teamed two of its leading applications, ACT! by Sage and Sage BusinessWorks, to provide a well-rounded solution that will help you maintain customer loyalty and vendor responsiveness. With comprehensive receivables and payables functionality at your disposal, you will have the tools to enjoy profitable customer and vendor relationships for the long term.

With the Sage BusinessWorks ACT! Link, you are assured of seamless integration that will help your company achieve greater efficiency and productivity. For instance, users operating within ACT! can issue sales orders, perform customer inquiries, or view detailed orders and invoices. In effect, the two products allow you to connect the two halves of your business—your front office, which includes your sales force, and the heart of your business, your accounting system.

In addition, bi-directional data transfer is available throughout the system, further boosting efficiency company-wide. The Sage BusinessWorks ACT! Link serves as a complete front office-back office solution that can elevate your company to the next level of profitability.



Sage BusinessWorks

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ACT! BENEFITS

Improve Business Relationships

ACT! puts important customer and vendor information at your fingertips. You'll be able to keep track of every conversation, completed activity, instantly recall meeting notes, access customer Web sites with just one click, and much more. By knowing the fine details of your business relationships you can achieve increased sales and customer loyalty.

See the Big Picture

ACT! provides you with an overall view of your company and its sales process. Manage groups of contacts by interest, company, account, project, and more. To help you make more effective management decisions, you can create subgroups based on organization structure, location, function, or a customized method.

Never Miss a Meeting

In a fast-paced business world it's essential to stay organized. ACT! maintains an electronic schedule for meetings, phone calls, and tasks; it can even be set to notify you with an alarm so you'll never forget.

Access Critical Information Whenever, Wherever

Even if you're on the road, you'll never be caught without your critical information. With ACT! you can download your latest contact information, such as names, numbers and activities—right into your Palm OS handheld device. You can also stay productive and up to date, whether across town or across the country, by taking advantage of the ACT! synchronization features.

Manage the Sales Process Throughout the Entire Cycle

ACT! provides an intelligent graphical sales funnel that helps you meet your goals with confidence—forecasting each and every opportunity. The software also offers powerful, customizable reporting tools for in-depth analysis of sales results. Or, to help you close more sales, take advantage of built-in sales tips and expertise.

Easy to Use

ACT! boasts a graphical navigation bar that makes it easy to select and view your data. Use the 60 predefined fields or create custom fields to track vital contact information. Plus, you can find any customer or vendor quickly by using keyword searches. From top to bottom, ACT! has been designed to be very user-friendly.

SAGE BUSINESSWORKS ACT! LINK BENEFITS

Synchronize Data

Data can be synchronized between the ACT! database and the Sage BusinessWorks database. The synchronization can be made for an individual contact, or in batches. This bi-directional data transfer ensures both databases are kept up to date improving customer and vendor communications.

Launch Sage BusinessWorks Programs from within ACT!

Launch Sage BusinessWorks tasks directly from within ACT!, and your sales force can enjoy automatic updating of all accounting information without ever having to switch between applications. Without having to navigate through the accounting software, their learning curve and training time is reduced to an absolute minimum, greatly increasing productivity. With the modules below linked, you can launch the following accounting tasks from within ACT!:

- Accounts Receivable – Maintain customers and invoices, and perform customer inquiries
- Order Entry – Maintain quotes and sales orders, and perform direct invoicing as well as quote, sales order, and invoice inquiries
- Accounts Payable – Maintain vendors, enter invoices, and perform vendor inquiries
- Inventory Control and Purchasing – Maintain purchase orders and perform purchase order inquiries

Customize Data Mapping

Map customer and vendor fields to the equivalent ACT! contact data fields for data transfer and synchronization.

Keep a Detailed Transaction History

A history entry is recorded in ACT! when accounting transactions are posted, providing your sales and purchasing teams with information necessary to maintain effective relationships with your customers and vendors. Examples include new sales orders, deleted sales orders, and edited sales orders.

Security

The Sage BusinessWorks ACT! Link protects your vital accounting information. Full Sage BusinessWorks security is in effect whenever an ACT! user tries to access a Sage BusinessWorks-specific task. In addition, tasks will only display in ACT! if the user has been granted security rights in Sage BusinessWorks.

For more information, please contact your Sage Software business partner.