

Cost effective software for integrating ACT! and Sage Instant/L50/MMS



"In order to remain competitive, we need to maximise every opportunity and keep our customer data as healthy as possible, especially when you consider that we are continually exploring new markets."

**Jeremy Pilkington, Sales & Marketing Director,
Flexifoil International Limited**

In today's sales driven organisation, with customer information stored in multiple databases, other computerised formats and paper based systems, it is difficult for staff to have all the information in the right place at the right time. Sales performance can be greatly improved if all customer information, including key financial data, can be accessed quickly and easily.

Sage have developed a series of links to integrate Sage ACT! Professional and Sage Accounting software, bringing together the benefits of the best-selling Contact Manager in the world and the leading accounting software in the UK. So now you can manage both your business contacts and view their accounts at the same time, allowing key decision makers to see which customers are most profitable, and which contacts are late payers and when they last paid their bills.

Why link your front and back office applications?

Let's ask a few questions about your business:

- Do your sales people know your credit terms?
- Do you know who your top customers are by turnover?
- Have your salespeople ever sold something to a customer who's actually on credit hold?
- Have you ever wanted to check customer account details before a meeting?

If your answer to any of those questions left you thinking about gaps in the running of your business then Sage ACT! Professional Link for Sage Instant Accounts, Sage Line 50 or Sage MMS can help your business in a number of ways.

Integrating the UK's leading CRM and Accounting Software

An integrated solution provides the “big picture”, where all the relevant sales, marketing and financial information for any contact is available at the click of a button.

A single source of information on your customers

How much of your sales force's time is spent typing in information or asking Finance or Customer Service departments for information that is already held electronically on your systems somewhere? Wouldn't you rather they were spending their time selling? If any changes are made to a contact record in ACT! Professional, or your customer or supplier details in your accounts system, you can use the Update function to make sure that both records contain the same information. You can also link individual ACT! Professional records to individual Sage customer or supplier records.

A complete business management system

Incorporating seamless links to Sage accounting software will give you “a single view of the customer”, the ability to share information across the company, and link together your sales, marketing and customer service people and processes.

Full visibility of customers

Credit limit, sales to date and outstanding debt information as well as trading terms and discounts available can now be displayed for each customer or supplier without changing applications or screens. Transactional information such as invoice numbers, details and amounts owed and paid are also displayed.

Customer and staff satisfaction

ACT! Professional Links for Instant/L50/MMS will improve existing customer service, loyalty and revenues - delivering key account data to your customer facing staff.



“I must say that ACT! has changed all our working lives here at Your Space dramatically for the better.”

Claire Dyson, Sales & Marketing Director,
Your Space (UK) Ltd

PLEASE NOTE:

ACT! Professional Link for Instant/L50/MMS is not a full product of either ACT! Professional or Sage Instant Accounts, Sage Line 50 or Sage MMS. This separately priced software application links ACT! Professional with Sage Accounts. Details of pricing can be found at www.sage.co.uk/act

Sage ACT! Professional and Sage ACT! Professional for Workgroups integrates with Sage Instant Accounts, Sage Line 50 or Sage MMS*, offering your business an integrated front and back office system developed by Sage and supported by Sage and its reseller community.

ACT! Professional Link for Instant Accounts

Save time entering customers information into both your ACT! and Instant Accounts software by utilising the ACT! Professional Link for Instant Accounts. A simple wizard allows you to transfer and update contact data between the two programs, and the Accounting tab within ACT! Professional then allows you to keep tracks of current account data. Customer information is current in both systems automatically, so your sales staff have an instant view of accurate account details and history without needing access to Sage Instant Accounts. Accounts and Sales can manage their own systems, thus reducing errors.

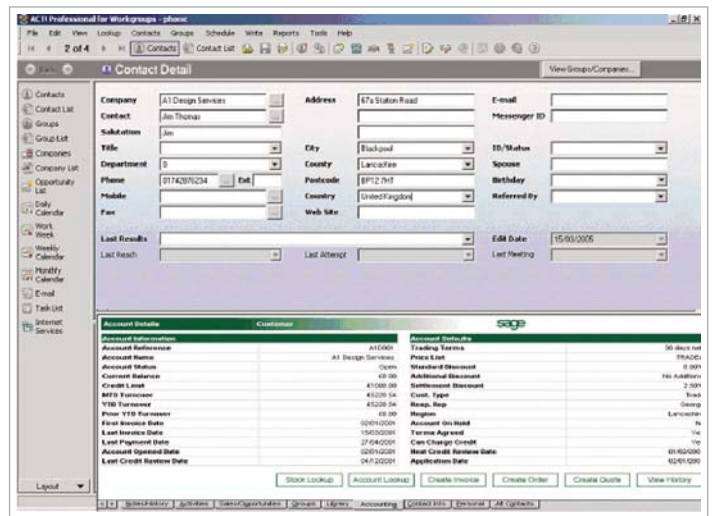
Account History			
Type	Date	Reference	Details
Invoice	29/01./2004	14	DIMM 64mb
Invoice	29/01./2004	14	SIMM 16mb
Invoice	29/01./2004	14	MTH3000 M
Invoice	29/01./2004	14	Lasercopy P
Invoice	29/01./2004	14	Coloured Pa
Invoice	29/01./2004	14	Pencil - Chin
Invoice	29/01./2004	14	Rubber Ban
Invoice	29/01./2004	14	Adhesive Ta
Invoice	29/01./2004	14	Adhesive Te
Invoice	29/01./2004	14	JPO30 Jet Pr

ACT! Professional Link for Line 50

If you are using Sage Line 50, this link is the perfect tool to allow the transfer of data between the two programs.

In addition to the benefits in the Link for Instant Accounts, ACT! Professional Link for Line 50 also allows you to process sales orders, purchase orders or quotations for any contact within ACT! at the touch of a button.**

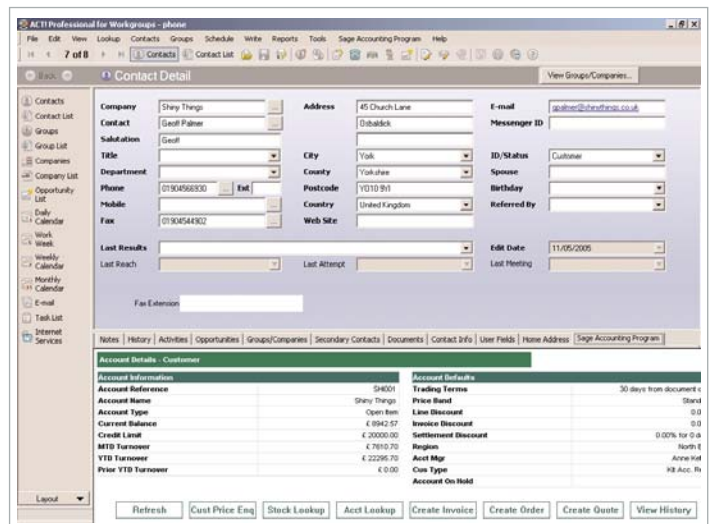
By automatically taking you to the relevant screen within your Line 50 package, not only does this integration save time, but can also improve customer service.



ACT! Professional Link for MMS

This enhanced link now includes all the additional features of the ACT! Professional Link for Line 50 and allows you to open the "stock lookup", "account lookup", "quotations", "Sales and Purchase Order Processing" windows within Sage MMS.***

There is also a "customer price enquiry" button which opens the relevant SOP screen in Sage MMS. The user can further drill-down to view details of sales and purchase orders from this customer and to launch the Stock Item Balance screen.



* ACT! Professional integrates with Sage Instant Accounts (v10 and above), Sage Line 50 (v9 and above) or Sage MMS (v2.2).

** Requires a Sage Line 50 Financial Controller installation on the same machine.

***Requires a Sage MMS installation on the same machine.

SYSTEM REQUIREMENTS

OPERATING SYSTEMS:

Microsoft® Windows® XP Home, XP Professional, 2000 Professional, 2000 Server, 2000 Advanced Server, Server 2003 Standard Edition, Server 2003 Enterprise Edition.

Note: Citrix Servers, Terminal Servers, Windows 2003 Web Servers, Windows 2003 Small Business Servers, and other unlisted versions of Windows are NOT supported.

PROCESSOR:

Minimum 266 Mhz processor (Pentium III or higher recommended)

MEMORY:

Minimum 256 MB RAM (512 MB RAM or higher recommended)

HARD DRIVE SPACE:

Minimum 350 MB of available hard disk space.

HARDWARE:

CD drive and SVGA (800x600) or higher resolution monitor.

SAGE INTEGRATION:

ACT! Professional and ACT! Professional for Workgroups integrates with Sage Instant Accounts (v10 and above), Sage Line 50 (v9 and above) or Sage MMS (v2.2)

FURTHER INFORMATION

Sage ACT! Professional Link for Instant/L50/MMS is available to purchase direct from Sage or via our network of ACT! Business Partners who provide local implementation, customisation and support services.

For more information on any Sage ACT! Professional Link software, please call the ACT! Sales Team on 0845 245 0276

POWER TO RUN YOUR BUSINESS

The Sage logo consists of the word "sage" in a white, lowercase, sans-serif font, set against a dark green rectangular background. The letters are slightly shadowed, giving a 3D effect.

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