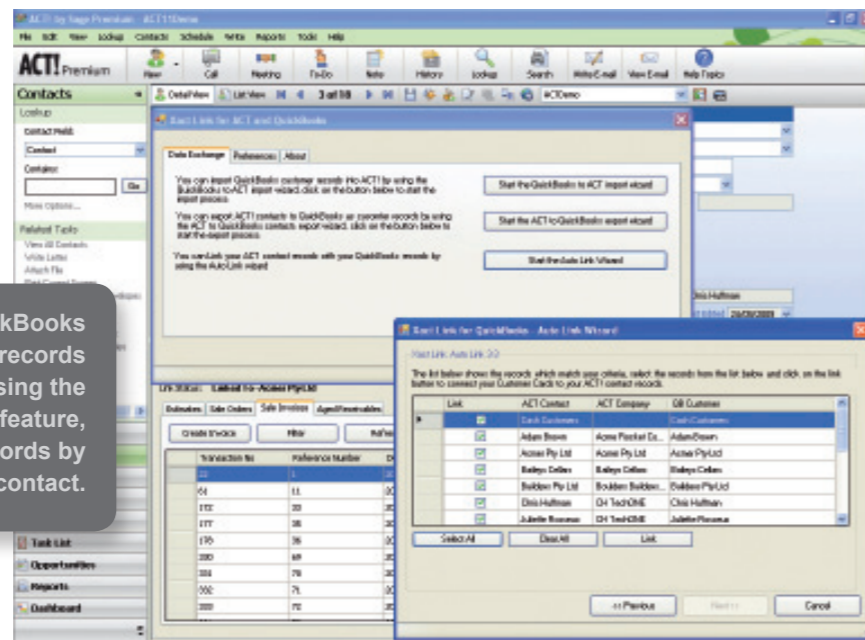


## Now see it in action

For a demonstration of the Xact Link for ACT! and QuickBooks go to:  
[www.xactsoftware.co.nz/quickbooks.html](http://www.xactsoftware.co.nz/quickbooks.html)



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 both the standard and premium versions)

- ACT! 2007
- ACT! 2008
- ACT! 2009
- ACT! 2010

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

The Xact Link for ACT! and QuickBooks is compatible with Windows XP, Windows Vista 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.

Contact us at  
[support@xactsoftware.co.nz](mailto:support@xactsoftware.co.nz)

Xact Software Solutions Limited  
 18 Kingsway Avenue Sandringham  
 Auckland 1025 New Zealand  
 Tel +64-9 377 6516  
 Fax+64-9 845 1171  
 Email [support@xactsoftware.co.nz](mailto:support@xactsoftware.co.nz)

[www.xactsoftware.co.nz](http://www.xactsoftware.co.nz)

**NEW** Integrate America's #1 small business financial software with the #1 selling contact & customer management software



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

## 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.

This 'front to back office integration' amalgamates customer information (datasets) and brings together disconnected processes – such as the estimate-to-order and order-to-cash cycle. It's the first fully integrated link for ACT! and QuickBooks, and allows for the creation of estimates, orders and invoices direct from ACT! – creating a complete and accessible customer history for all staff to use.

Where customer data is not integrated effectively, business process are usually punctuated by errors, delays, manual intervention and paperwork. This will impact negatively on overall customer service as well as increase transactional costs on an exponential basis.

But 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
- achieve competitive advantage

# 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.

The screenshot shows the ACT! Premium interface. The top window displays contact details for 'Aconer Pty Ltd' with fields for company, contact, address, phone, and email. Below this, a 'Marketing Results' tab is active, showing a table of aged receivables. The table has columns for Transaction No, Reference Number, Due Date, Lines Total, Balance Remaining, Total Tax, and Tax Inclusive.

Transaction No	Reference Number	Due Date	Lines Total	Balance Remaining	Total Tax	Tax Inclusive
22	1	2001-04-02	701.00	0.00	71.00	False
61	11	2001-05-27	522.00	0.00	47.50	False
172	33	2001-06-08	396.00	0.00	36.00	False
177	35	2001-07-01	198.00	0.00	18.00	False
178	36	2001-07-02	1896.25	0.00	172.45	False
330	69	2001-08-06	363.00	0.00	33.00	False
331	70	2001-08-06	363.00	0.00	33.00	False
332	71	2001-08-06	363.00	0.00	33.00	False

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

The screenshot shows the 'Invoice - Aconer Pty Ltd' window in ACT! Premium. It features fields for 'Invoice To' and 'Ship To' with address and contact information. Below these is a table of items to be invoiced, including 'Indoor/Outdoor Paint', '4x4 Cedarwood Timber', and 'Red Roof Tiles'. The bottom of the window shows 'Due Date', 'Ship Date', and a 'Total' amount of \$2,098.00.

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

The screenshot shows the contact detail view for 'Aconer Pty Ltd' in ACT! Premium. A prominent blue button labeled 'ONE' is visible in the bottom right corner of the contact information area. The window also shows various contact details and a 'Marketing Results' tab.

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

The screenshot shows the XACT Software Solutions interface, displaying a document titled 'XACT SOFTWARE SOLUTIONS'. It includes a table of items with columns for Line Number, Description, Amt G/L Tax, Amount Inc Tax, Discount, Quantity, Item Number, and Tax Code. The items listed include 'Cedar Filler Large', '12 Litres Wash Spring', and '12 Litres Clear Carbon'. The bottom of the page shows a 'Thank you' message and contact information for XACT Software Solutions.

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

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

Export and link ACT! contact records as customer records in QuickBooks.

Update QuickBooks customer details from within ACT!

Create a new customer record in QuickBooks from an ACT! record with the click of a button.

Attach estimates and invoices to History tab in ACT! and email to your customer as a secure pdf attachment. Even add comments, or further attachments before sending.

Create estimates, orders and invoices from within ACT!

Save estimates, orders and invoices from QuickBooks against the ACT! record.

View aged receivables from ACT!

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.

The complete solution for optimising workflow and increasing operating efficiency