



# Sage BusinessWorks Accounting

## ACT! Link

### Increase Customer Satisfaction, Efficiency, and Profitability by Connecting your Sales Force with your Accounting Team

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 has teamed two of its leading applications, ACT! by Sage and Sage BusinessWorks Accounting, 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, bidirectional data transfer is available throughout the system, further boosting efficiency companywide. The Sage BusinessWorks ACT! Link serves as a complete front office and back office solution that can elevate your company to the next level of profitability.

## ACT! Benefits

### Organize the Details of Your Customer Relationships

Strong business relationships are essential to your success. With ACT!, you can organize all the details of your customer relationships in one place—from basic contact information to detailed notes on past interactions—for a complete view of the people you do business with. Next time a customer calls, you're prepared with a response about what you discussed last time, as well as personal details like a favorite sports team, to set your business apart from the rest.

### Generate Actionable Demand with End-to-End E-marketing<sup>1</sup>

Grow your business by attracting new customers and getting more from existing relationships with end-to-end ACT! E-marketing. Not only can you create and send striking e-mail and drip marketing campaigns using a simple online editor, you'll also be able to quickly identify your most interested prospects using a ranked call list so you know who to reach out to first.

### Take Action on Your Most Qualified Sales Leads

Focus on your most viable leads by capturing and managing each lead through the sales process. Record detailed progress notes, include your products and services, and see the probability of close. This gives you total visibility and control of your sales pipeline so you know where to focus your immediate efforts.

### Be More Productive Right Away

Don't worry about a learning curve. ACT! is easy to learn and use and we can prove it's easier than competitive solutions. In fact, you can be 25%<sup>2</sup> more productive by choosing ACT! over the competition. If your customer information lives in spreadsheets today, you can import all of that valuable data into ACT! and continue building upon it.

### Integrate with Existing Business Solutions

Take full advantage of the familiar solutions you've already invested in. Integrate ACT! with your e-mail, calendar, and more than 10 popular business solutions, including Outlook, Word, Excel®, and Lotus Notes®.

## Coordinate Efforts Across Your Team

Good news! Just one place to enter phone numbers, e-mails, and more. You and your team can access all the same relationship details from one place—ACT!—to better coordinate your efforts when speaking to customers and appear completely in sync.

## 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 bidirectional 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 customer information 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 only display in ACT! if the user has been granted security rights in Sage BusinessWorks.

<sup>1</sup> Requires additional subscription.

<sup>2</sup> Based on a Keystroke Level Modeling competitive study conducted by Sage and Measuring Usability, LLC in May 2009. Competitors include Microsoft Dynamics® CRM and Salesforce.com.