HOGAN DATA
Managing Your Information!

DataPlus Addon Software

Integrate QuickBooks With Act Premium!

- **DataPlus allows data mining QuickBooks in Act faster & more efficiently than within QuickBooks.**
- **QuickBooks install is not needed for every Act user.**
- **DataPlus enables you to create/edit Customers – Vendors – Employees from Act contacts.**
- **DataPlus provides QuickBooks statistical and historical data in Act fields and view complete transaction data within Act Company & Contact Levels!**
- **DataPlus enables you to create QuickBooks Quotes – Estimates – Sales Orders – Invoices – Purchase Orders for your Sage customers or Vendors from within Act!**
- **DataPlus enables you to import QuickBooks data into Act Custom Tables & Inventory Items to Act Opportunity Product List!**

Configure QuickBooks Push

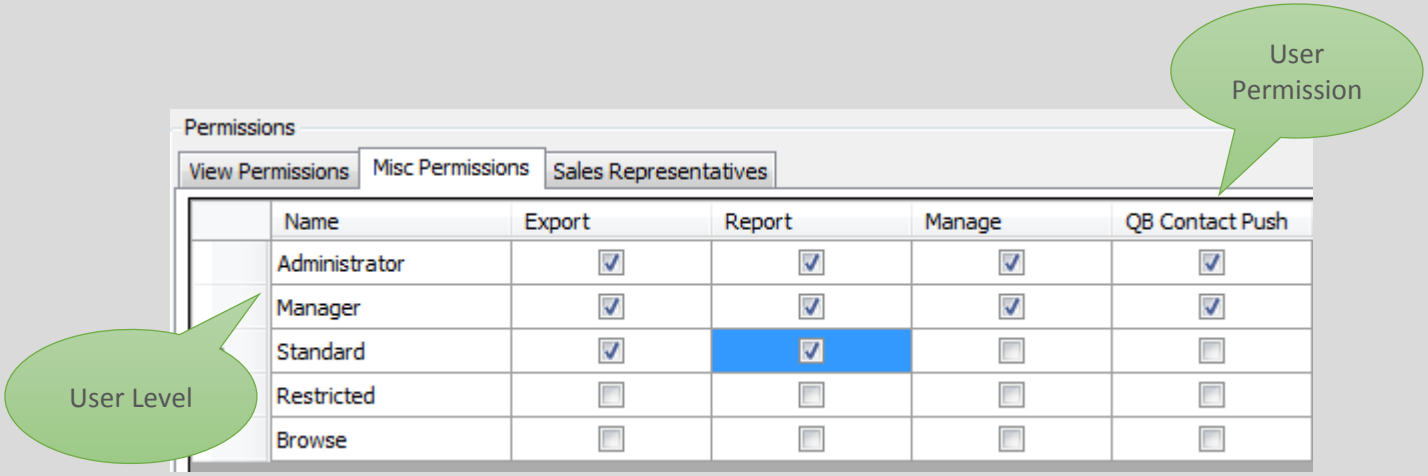
Configure QuickBooks Push for Customers – Vendors – Employees

DataPlus 4.0 Manage Permissions

QB Contact Push

- Customer
- Vendor
- Employee

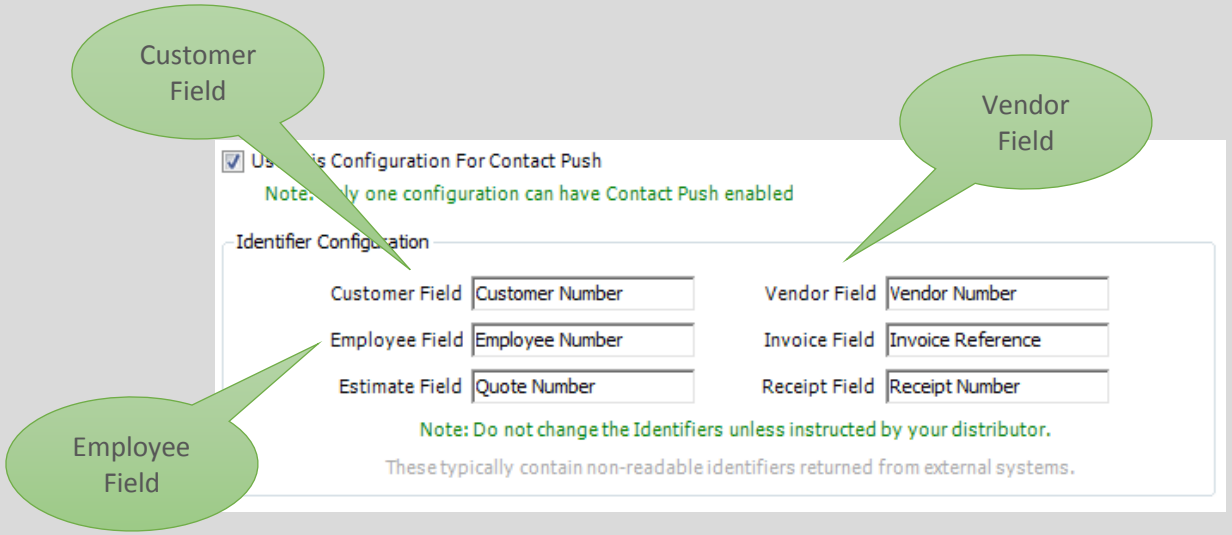
Allows or disallows Act user from creating entity from Act



Configuration For Contact Push

Configure identifier field mapping in Act for pushing contacts to QuickBooks

You can also edit Customer, Vendor & Employee from within Act

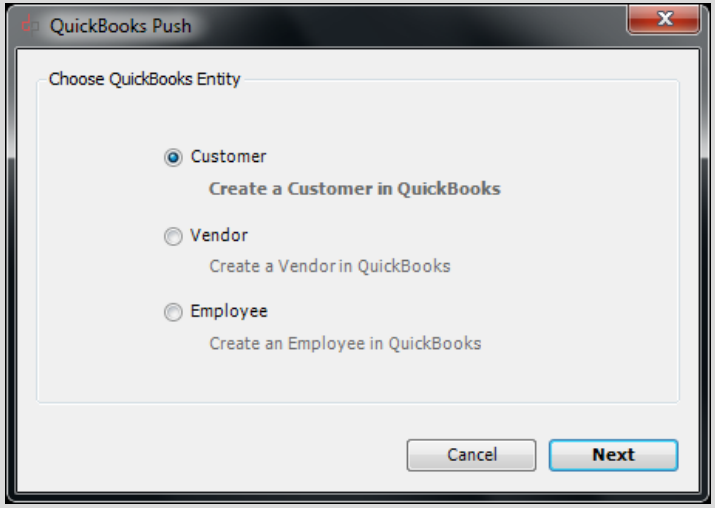


Create/Edit Customer

Eliminate double entry for your contacts saving you time & provide more consistency between QuickBooks and Act.

- Create prospect in Act
- Work your prospect tracking calls, meetings, emails, documents in Act
- Convert prospect to customer then push to QuickBooks from within Act
- When changes are made to Customer in Act, push to edit Customer in QuickBooks

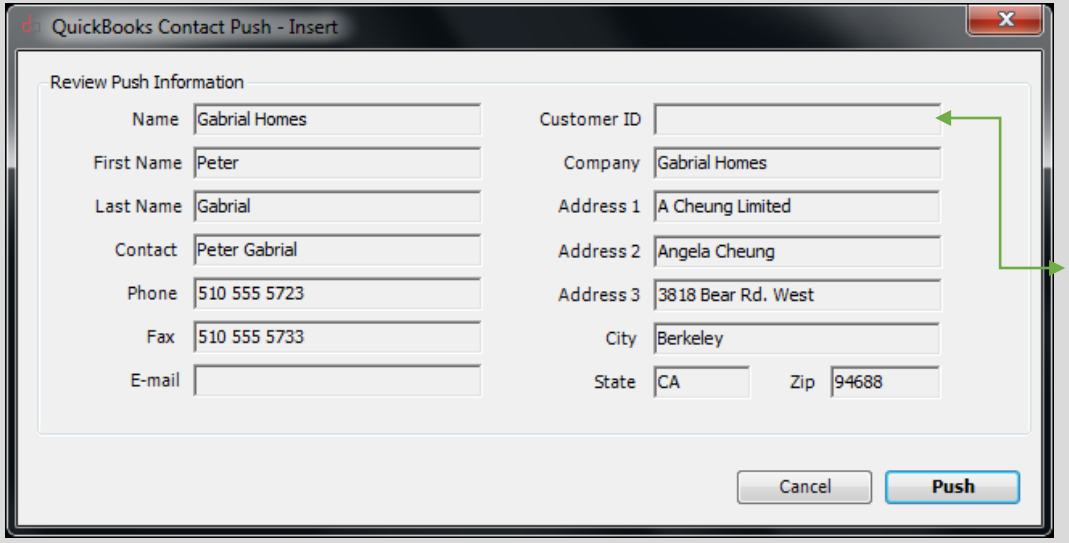
Push Act Contact as Customer to QuickBooks



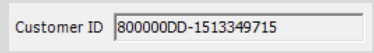
- Choose QuickBooks Entity
- Customer
- Create a Customer in QuickBooks

When same Customer is pushed again, DataPlus will edit the Customer

Review Push Information

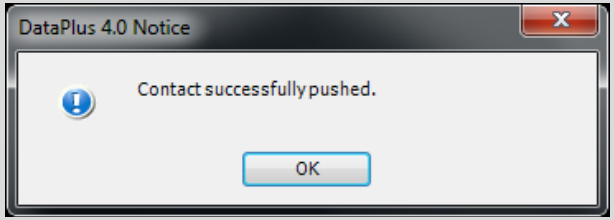


After push, the Customer ID is associated with Act Contact & QuickBooks Customer.



When you edit contact Customer ID is used to edit associated Customer in QuickBooks.

Customer successfully pushed



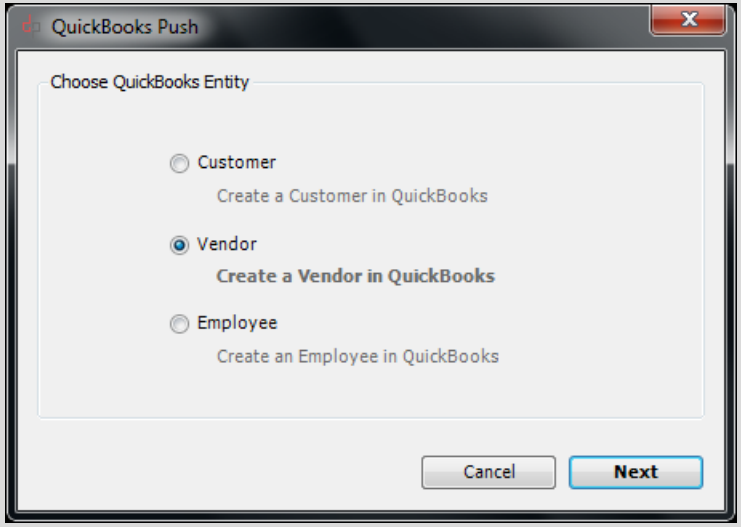
You have successfully created or edited the Customer contact from Act to QuickBooks.

Create/Edit Vendor

Eliminate double entry for your Vendor saving you time & provide more consistency between QuickBooks and Act.

- Create Vendor in Act
- When ready, push Vendor contact to QuickBooks

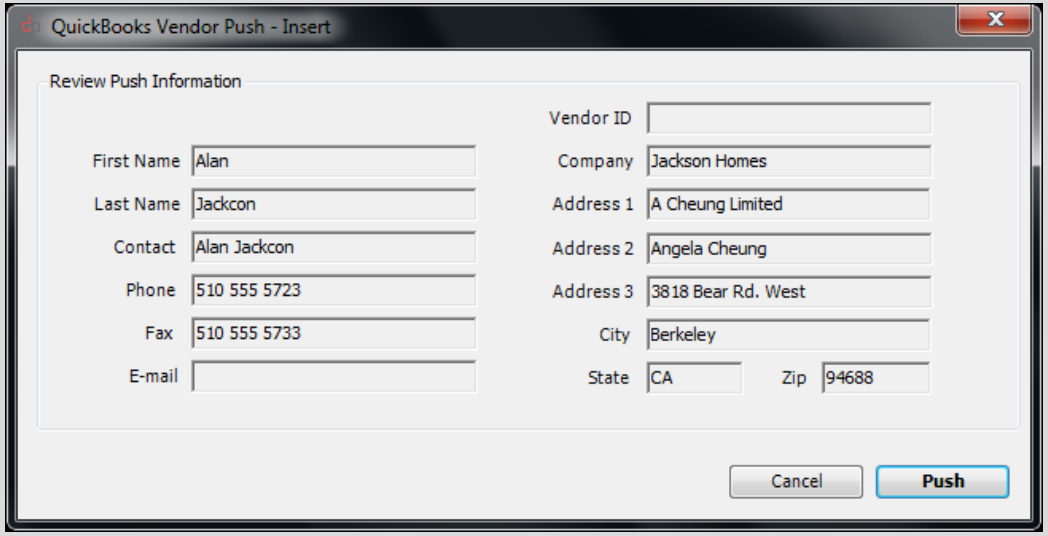
Push Act Contact as Vendor to QuickBooks



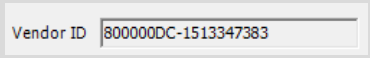
- Choose QuickBooks Entity
- Vendor
- Create a Vendor in QuickBooks

When same Vendor is pushed again, DataPlus will edit the Vendor

Review Push Information

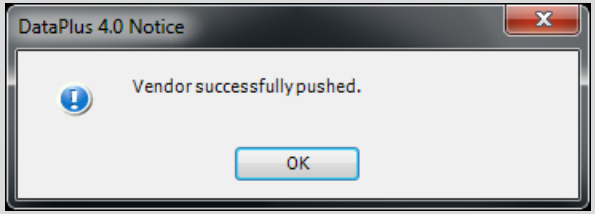


After push, the Vendor ID is associated with Act Contact & QuickBooks Vendor.



When you edit contact Vendor ID is used to edit associated Vendor in QuickBooks.

Vendor successfully pushed



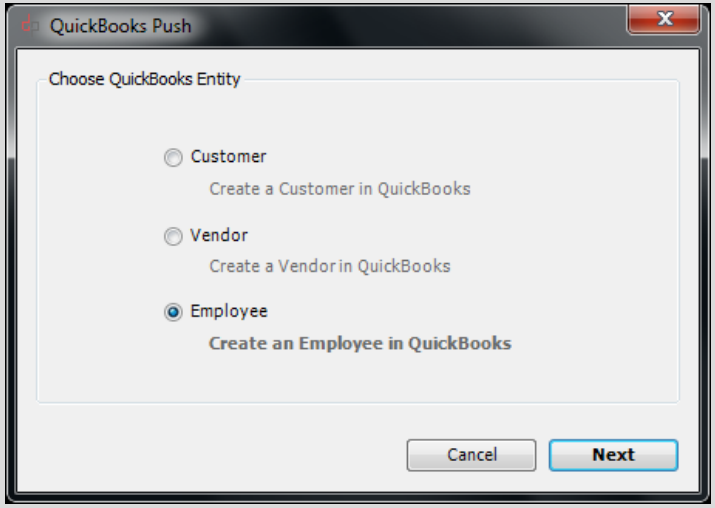
You have successfully created or edited the Vendor from Act to QuickBooks.

Create/Edit Employee

Eliminate double entry for your Vendor saving you time & provide more consistency between QuickBooks and Act.

- Create prospect Employee in Act
- Interview your contact tracking calls, meetings, emails, documents in Act
- Convert contact to Employee then push to QuickBooks from within Act
- When changes are made to Employee in Act, push to edit Employee in QuickBooks

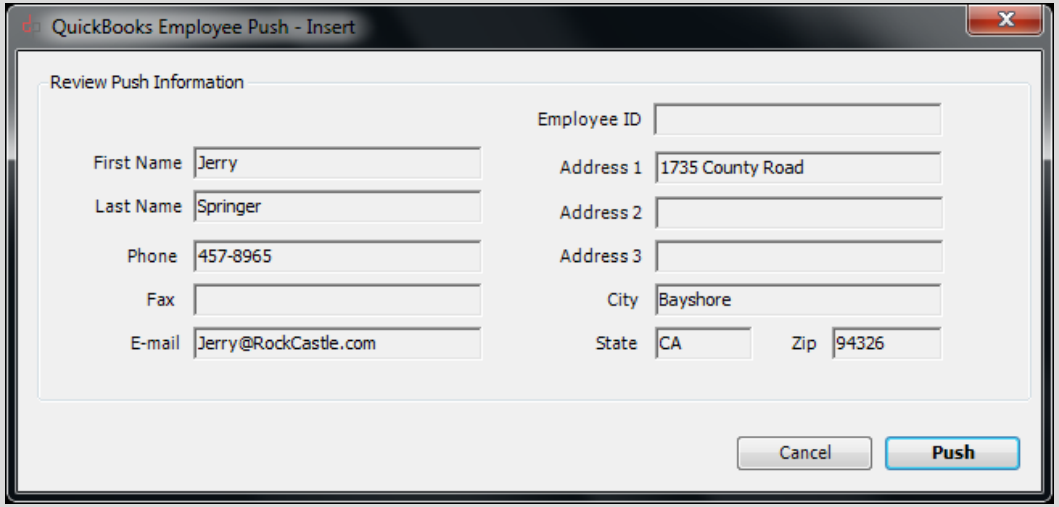
Push Act Contact as Employee to QuickBooks



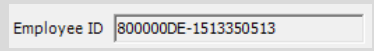
- Choose QuickBooks Entity
- Employee
- Create a Employee in QuickBooks

When same Employee is pushed again, DataPlus will edit the Employee

Review Push Information

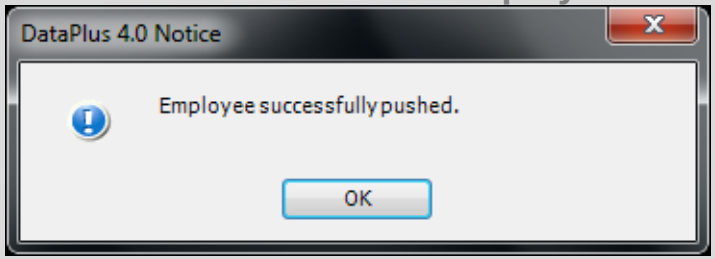


After push, the Employee ID is associated with Act Contact & QuickBooks Employee.



When you edit contact Employee ID is used to edit associated Employee in QuickBooks.

Employee successfully pushed.



You have successfully created or edited the Employee from Act to QuickBooks.

QuickBooks Contact Information In Act Field

Contact Information

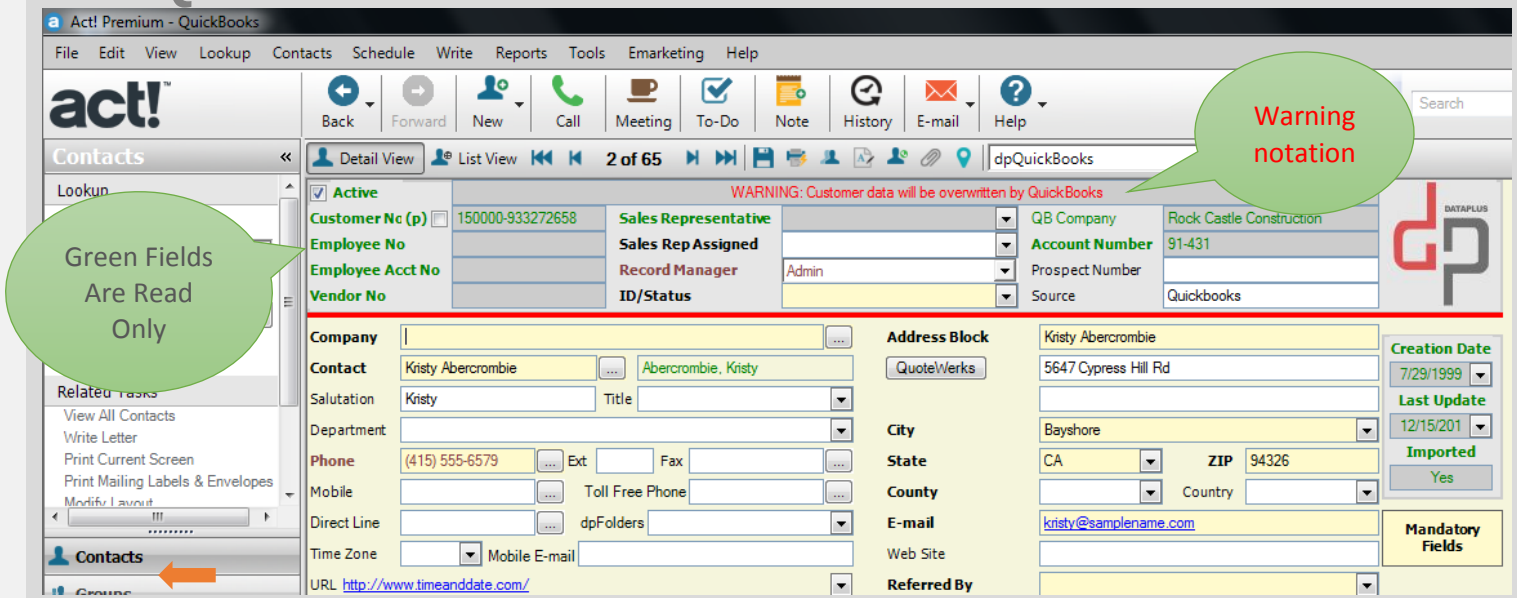
Primary Act contact data is shared between Customers, Vendors and Employees.

Custom Protected Fields

- Warning
- Inactive
- Customer Number
- Employee Number
- Vendor Number
- Sales Rep
- QuickBooks Company
- QB Creation Date
- QB Last Update

Custom Unprotected Fields

- Direct Line Phone
- Toll Free Phone
- dpFolders
- Time Zone
- Mobile E-mail
- Customer Ref No
- Prospect Number
- Source



DataPlus integrates with Act! Premium & uses Field Level permission & Limited Access.

Act Fields:

- Green fields in Act are by default “Read Only” fields for all Act users except Act Administrators.
- Fields can be modified to “No Access” to allow you to protect specific information.
- Most QuickBooks custom fields can be created with first import to your existing database.

Act! Layout

- We provide an Act database for your convenience with all custom fields and layout for Company, Contact, Group & Opportunity levels.
- The layout can also be used as a template for your existing database. All you do is map your fields to layout fields.

Warning notation field lets you know that the current contact information is coming from QuickBooks. QuickBooks wins!

Contact Financial History

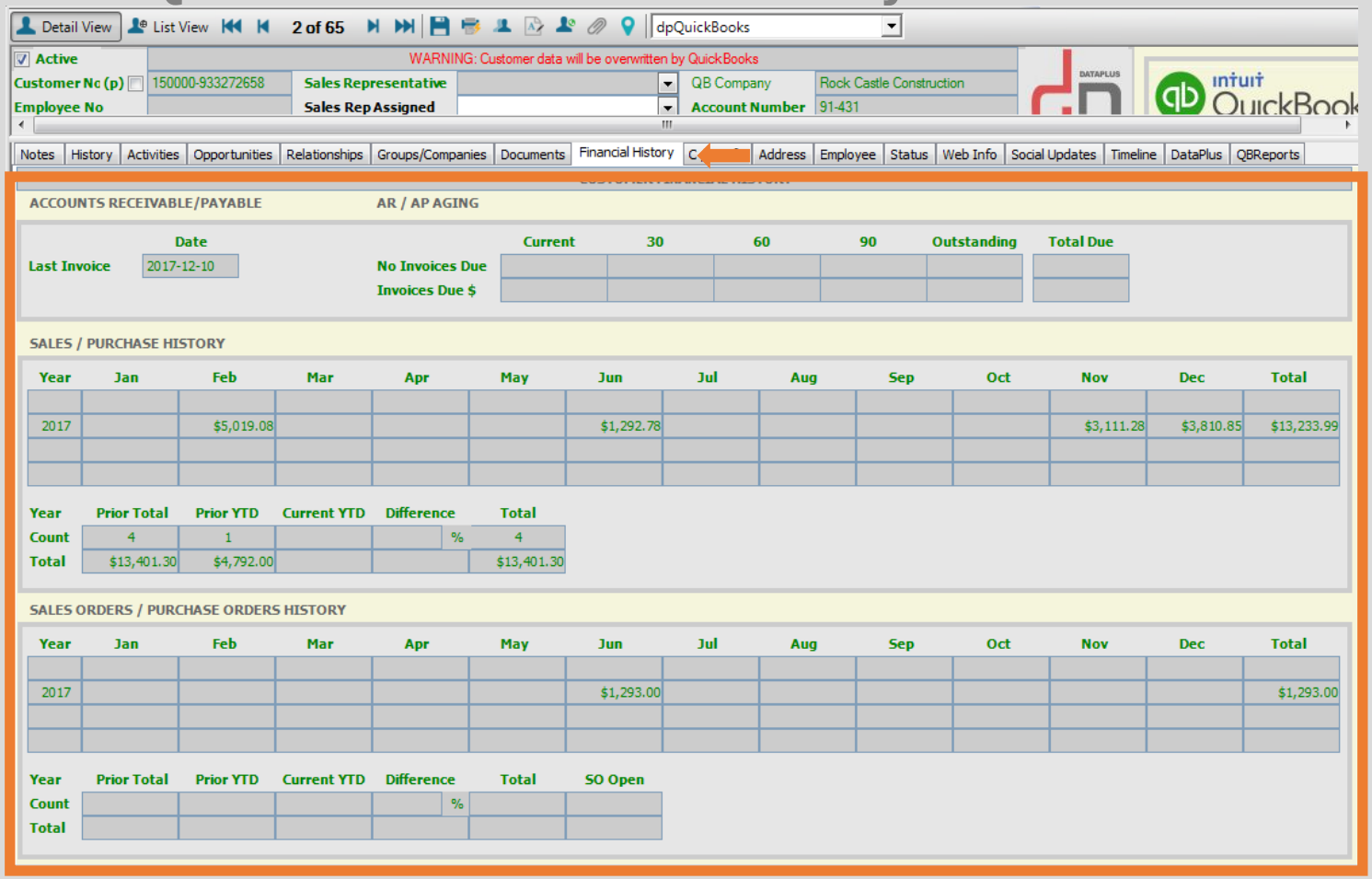
Customer /Vendor / Salesperson

- 4 year Sales History by Month/Year
- Prior Total Count
- Prior Total Sales/PO
- Prior YTD Count
- Prior YTD Sales/PO
- Current YTD Count
- Current YTD Sales/PO
- YTD % Difference
- YTD Sales Difference

Customer /Vendor / Salesperson

- 4 year PO History by Month/Year
- Prior Total Count
- Prior Total SO/CO/QT
- Prior YTD Count
- Prior YTD SO/CO/QT
- Current YTD Count
- Current YTD O/CO/QT
- YTD % Difference
- YTD Sales Difference

QuickBooks Financial HIstory In Act Field



Financial History custom fields are shared between Customer, Vendor and Employees from QuickBooks.

Data is updated on a scheduled basis using MS Task Scheduler.

Contact C / V Info

Customer/Vendor Information

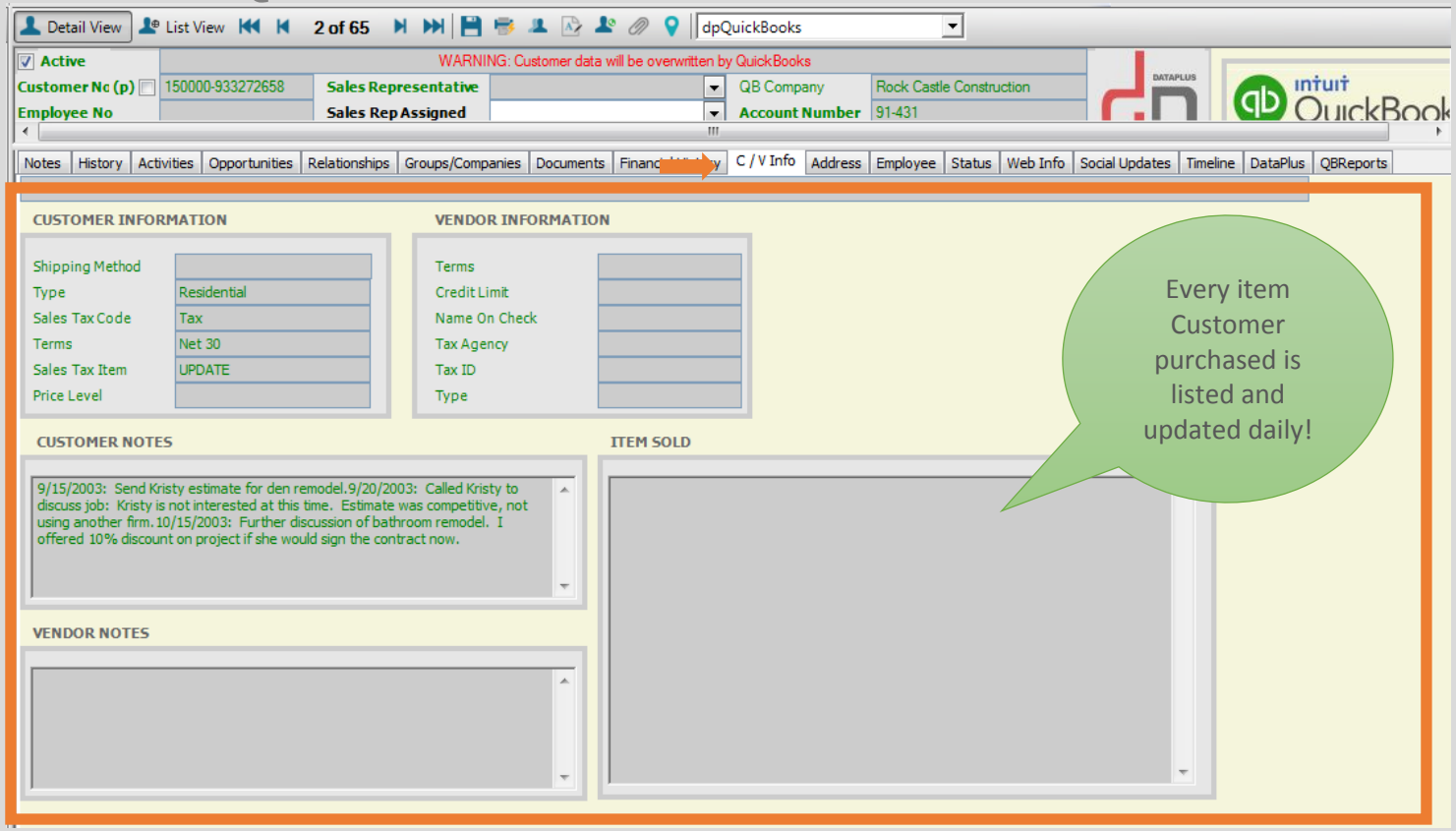
Customer Information

- Shipping Method
- Type
- Sales Tax Code
- Terms
- Sales Tax Item
- Price Level
- Customer Notes
- Items Sold

Vendor Information

- Terms
- Credit Limit
- Name on Check
- Tax Agency
- Tax ID
- Type
- Vendor Notes

QuickBooks Information In Act Field



Item Sold memo field contains every item purchase by Customer. You can create dynamic groups for Customers that purchased or did not purchase specific items.

Data is updated on a scheduled basis using MS Task Scheduler.

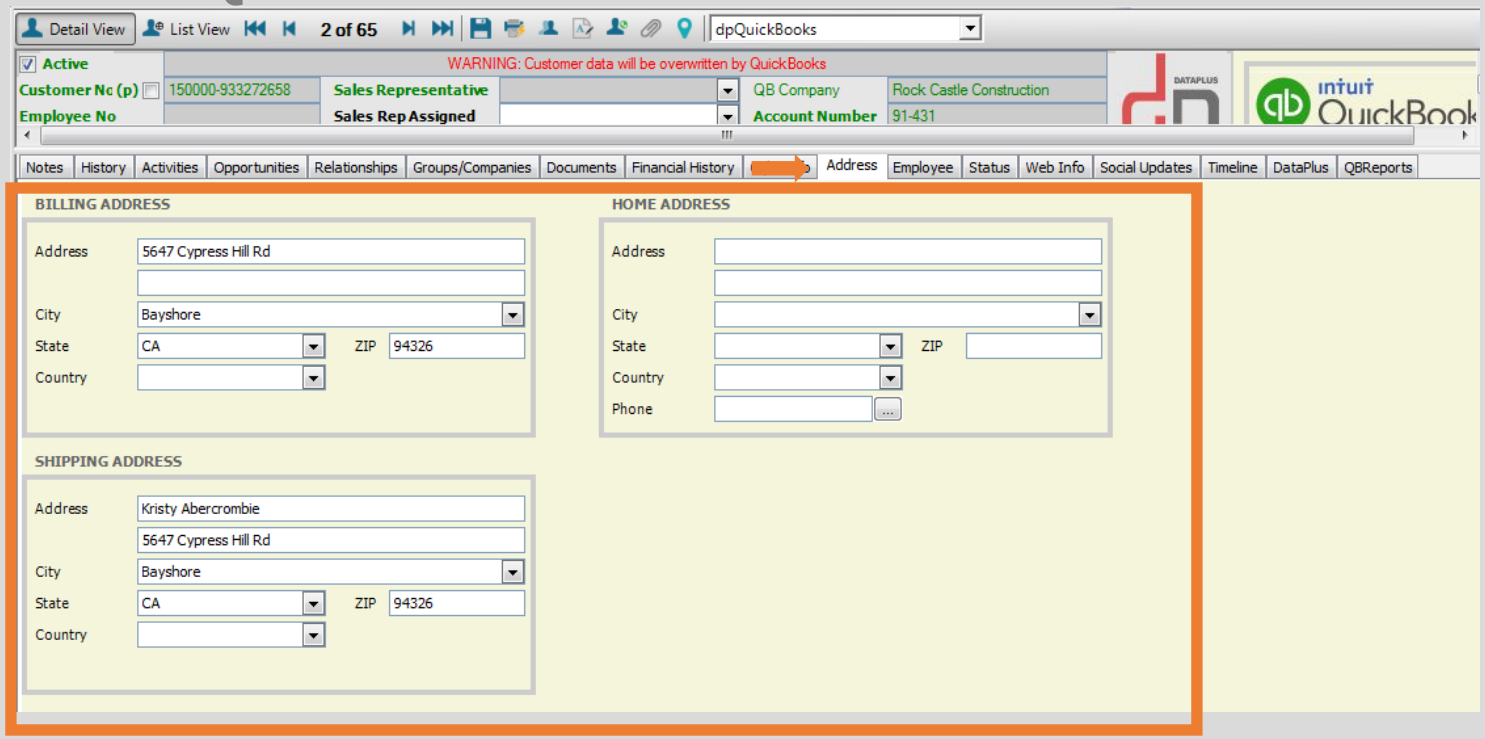
Contact Addresses

Billing Address

Shipping Address

Employee Address

QuickBooks Additional Address Fields



Data is updated on a scheduled basis using MS Task Scheduler.

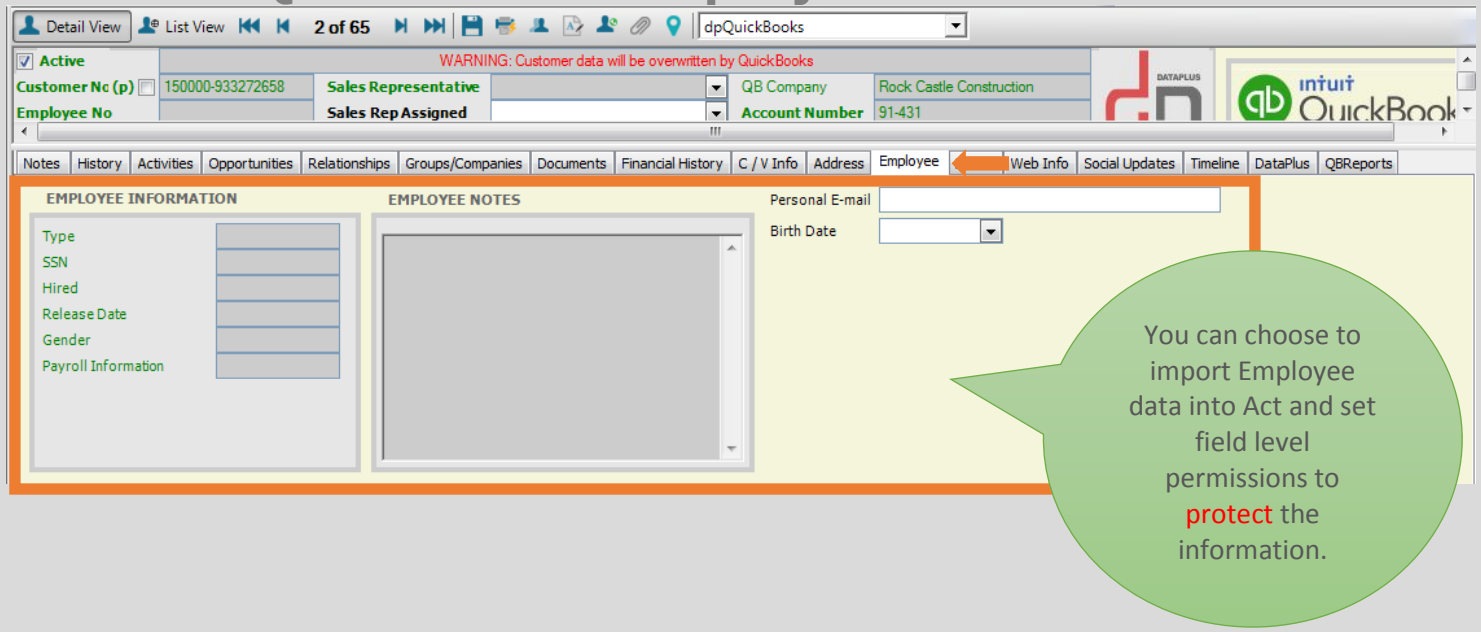
Contact Employee

Employee Information

- Type
- SSN
- Release Date
- Gender
- Payroll Information
- Personal E-mail
- Birth Date

Employee Notes

QuickBooks Employee Information



Because DataPlus uses Act Premium, Employee data can be set to no access by Administrator for User Level, or by specific users.

DataPlus allows you to disable the import of Employee data.

Data is updated on a scheduled basis using MS Task Scheduler.

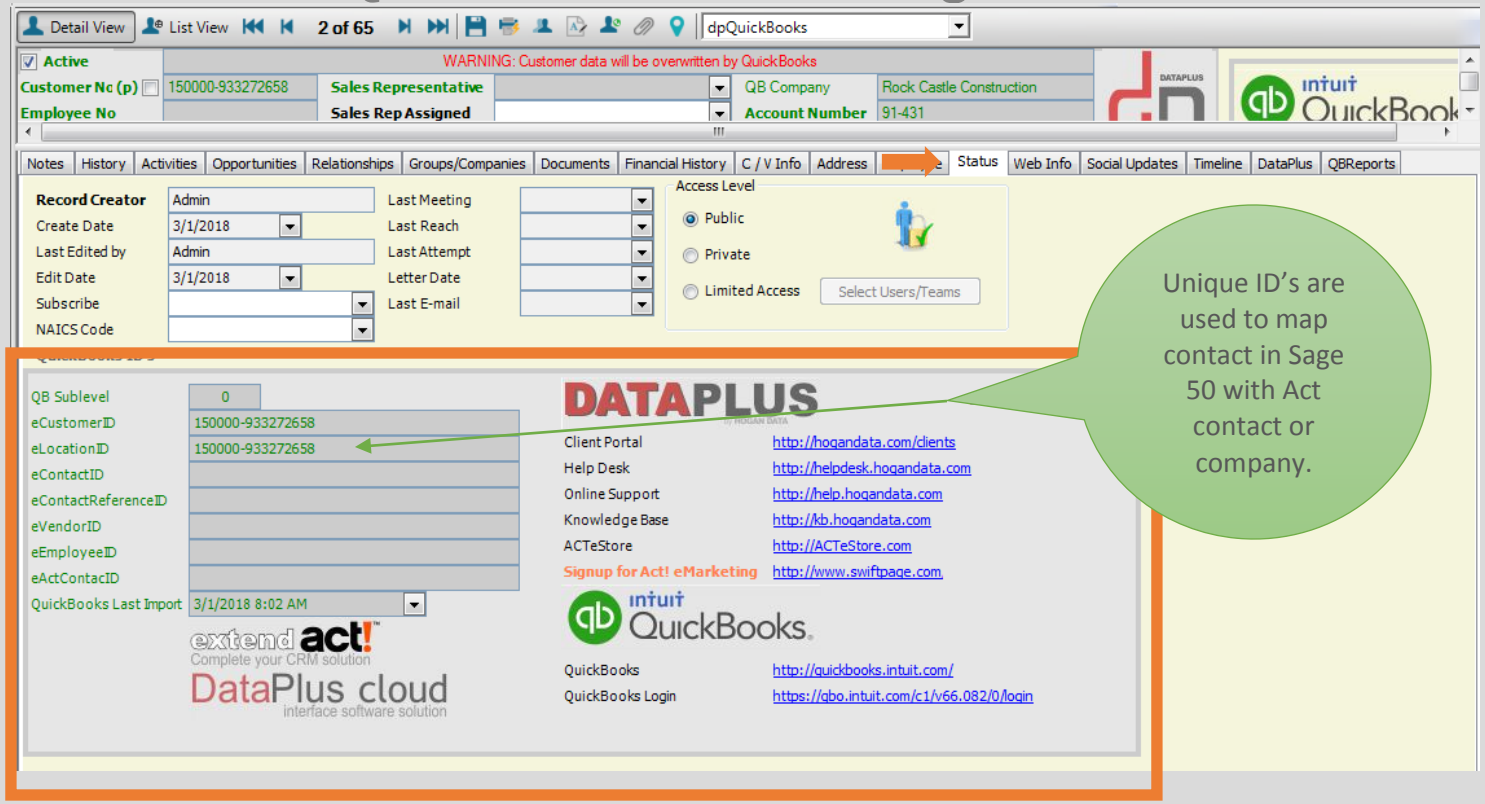
Contact Status

QuickBooks ID's

- eCustomerID
- eLocationID
- eEmployeeID
- eVendorID
- eActContactID
- QBCA Last Import

DataPlus Help Links

QuickBooks / Act Unigue IDs



The eIDs are used for importing data from QuickBooks to the correct contact. These fields should never be duplicated with the exception of eLocationID. eLocationID is used for associating a contact with company in Company level when imported.

Data is updated on a scheduled basis using MS Task Scheduler.

Act Product List

QuickBooks Item List

Items are imported to Act Product list by Item Type.

Default setting “true”

- Group
- Other Charge
- Inventory Part
- Service

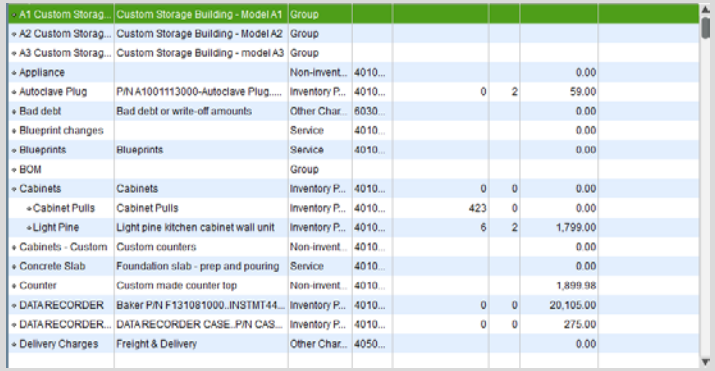
Default setting “false”

- Discount
- Payment

Act Product List

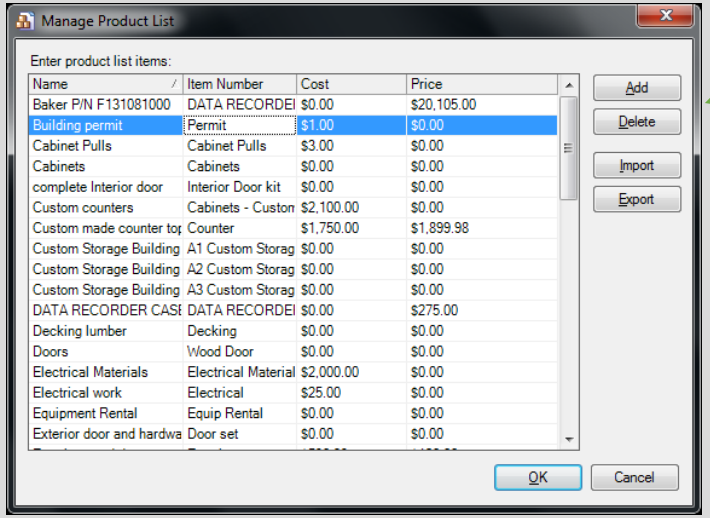
- Name
- Item Number
- Cost
- Price

QuickBooks Item List Imported to Act Product List



A1 Custom Storag...	Custom Storage Building - Model A1	Group				
A2 Custom Storag...	Custom Storage Building - Model A2	Group				
A3 Custom Storag...	Custom Storage Building - model A3	Group				
Appliance		Non-invent...	4010...			0.00
Autoclave Plug	P/N A1001113000-Autoclave Plug.....	Inventory P...	4010...	0	2	59.00
Bad debt	Bad debt or write-off amounts	Other Char...	6030...			0.00
Blueprint changes		Service	4010...			0.00
Blueprints	Blueprints	Service	4010...			0.00
BOM		Group				
Cabinets	Cabinets	Inventory P...	4010...	0	0	0.00
Cabinet Pulls	Cabinet Pulls	Inventory P...	4010...	423	0	0.00
Light Pine	Light pine kitchen cabinet wall unit	Inventory P...	4010...	6	2	1,799.00
Cabinets - Custom	Custom counters	Non-invent...	4010...			0.00
Concrete Slab	Foundation slab - prep and pouring	Service	4010...			0.00
Counter	Custom made counter top	Non-invent...	4010...			1,899.98
DATA RECORDER	Baker P/N F131081000..INSTMT44...	Inventory P...	4010...	0	0	20,105.00
DATA RECORDER...	DATA RECORDER CASE..P/N CAS...	Inventory P...	4010...	0	0	275.00
Delivery Charges	Freight & Delivery	Other Char...	4050...			0.00

QuickBooks Item List



Act Opportunity Product List

Import Settings for QuickBooks Item Type

View: QB: Act Opportunity Settings Items

7 Records	Type	Key	Value
Drill Down	opportunity_inventory_items	import	true
Drill Down	Discount	import_type	
Drill Down	Group	import_type	true
Drill Down	Other Charge	import_type	true
Drill Down	Inventory Part	import_type	true
Drill Down	Payment	import_type	
Drill Down	Service	import_type	true

Act Opportunity Product list mirros QuickBooks Item List, giving you the most current items from QuickBooks and enables you to import by Item Type.

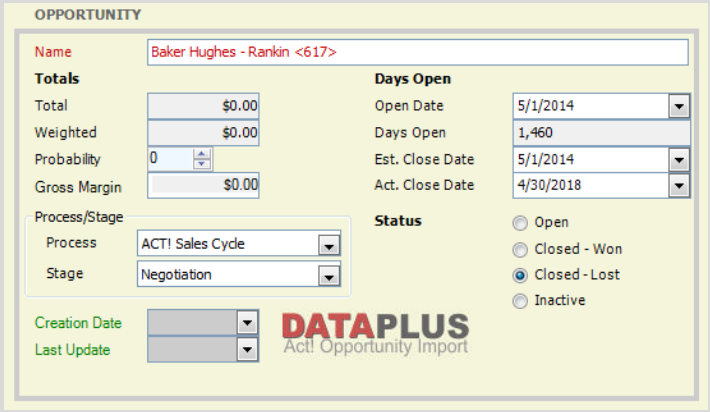
Data is updated on a scheduled basis using MS Task Scheduler.

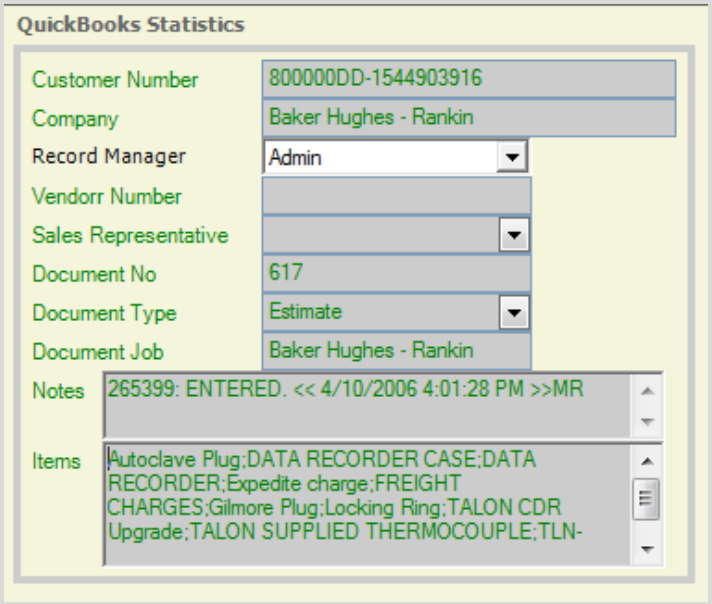
Act Opportunities

Custom Protected Act Fields

- Customer Number
- Company
- Vendor Number
- Sales Representative
- Document No
- Document Type
- Document Job
- Notes
- Item List
- eCustomerID
- eDocumentID

QuickBooks Transactions Imported to Act Opportunity





Act Opportunity Statistics

QuickBooks Transaction Statistics

QuickBooks Transaction Notes

Every item in Act Opportunity is listed and updated daily!

Item List memo field contains every item in Act Opportunity. You can create dynamic groups for Opportunities specific items.

Data is updated on a scheduled basis using MS Task Scheduler.

QuickBooks Transactions Menu

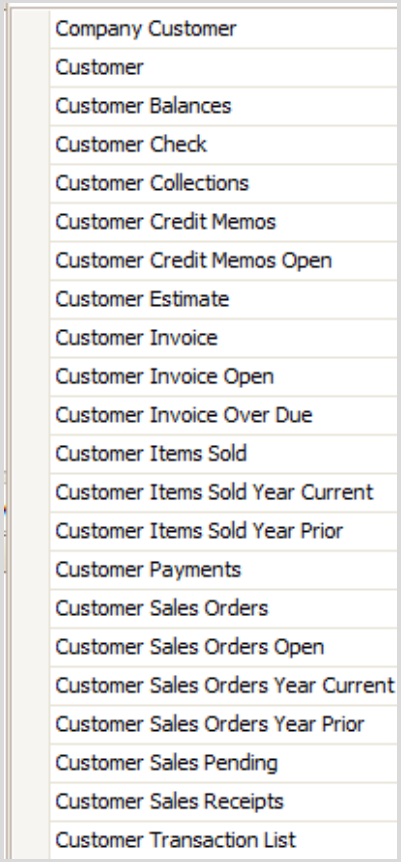
Transaction Menu

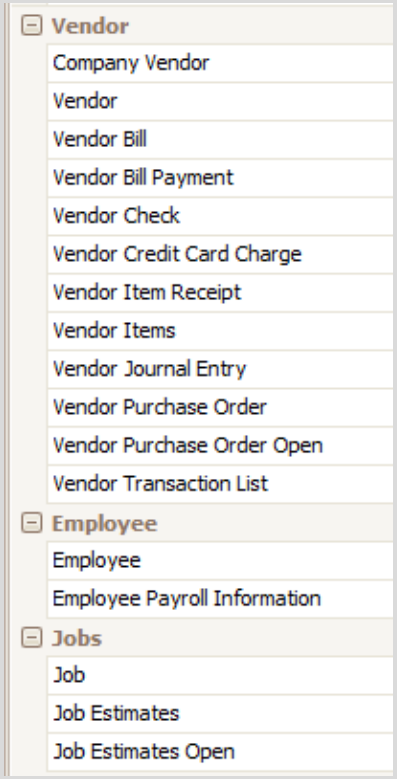
DataPlus provides relational transaction menu for Customer, Vendor, Employee & Inventory.

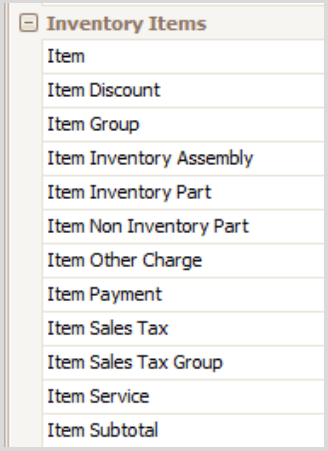
Customer & Vendor relational transactions are available in both Company & Contact Level.

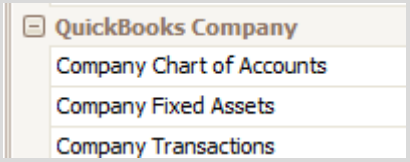
Menu is also available for all transactions & will allow contact lookup from menu item.

Each menu item allows drill down to more details or to related transactions.









QuickBooks Transactions

Transaction Menu

DataPlus provides relational transaction menu for Customer, Vendor or Employee.

Customer & Vendor relational transactions are available in both Company & Contact Level.

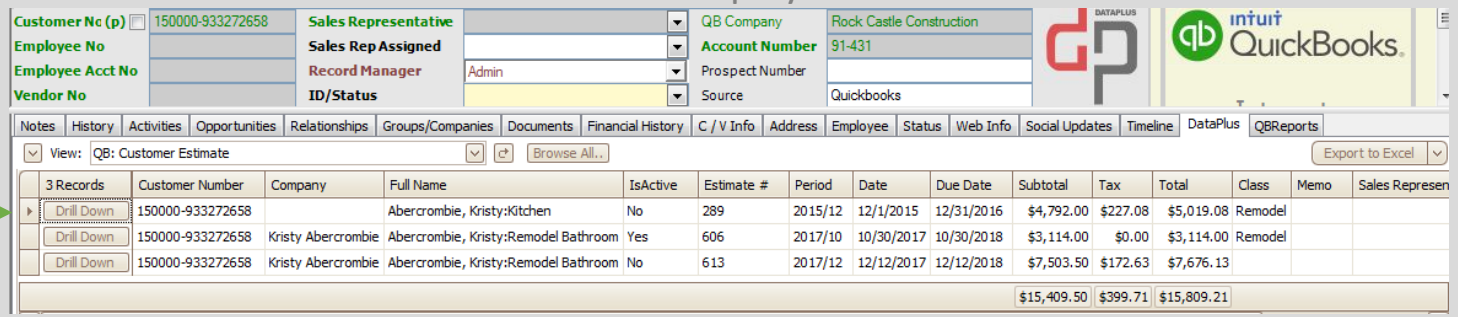
Each menu item allows drill down to more details or to related transactions.

Where relative, columns are totaled.

Menu is also available for all transactions & will allow contact lookup from menu item.

QuickBooks Transactions Menu

Relational transactions for contact are displayed in “DataPlus” Tab



Customer No (p)	150000-933272658	Sales Representative		QB Company	Rock Castle Construction
Employee No		Sales Rep Assigned		Account Number	91-431
Employee Acct No		Record Manager	Admin	Prospect Number	
Vendor No		ID/Status		Source	Quickbooks

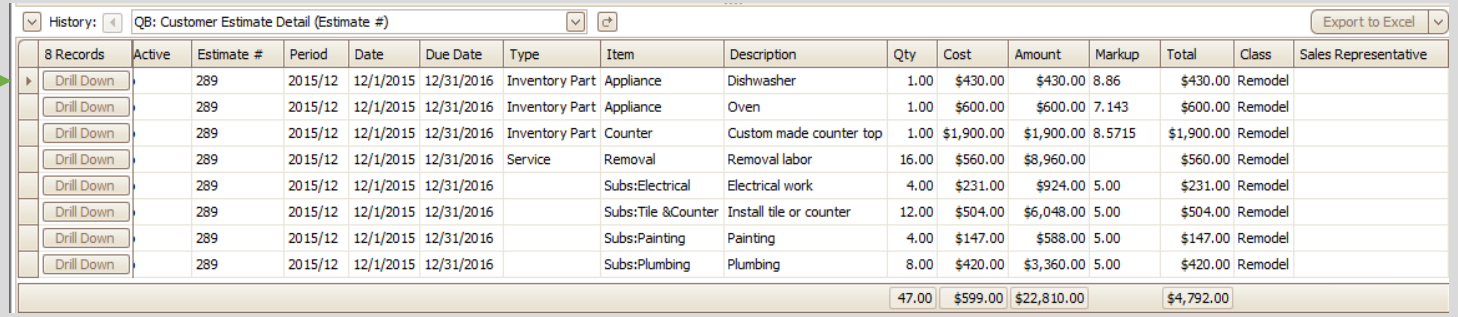
Notes | History | Activities | Opportunities | Relationships | Groups/Companies | Documents | Financial History | C / V Info | Address | Employee | Status | Web Info | Social Updates | Timeline | DataPlus | QBReports

View: QB: Customer Estimate — Browse All... — Export to Excel

3 Records	Customer Number	Company	Full Name	IsActive	Estimate #	Period	Date	Due Date	Subtotal	Tax	Total	Class	Memo	Sales Represen
Drill Down	150000-933272658		Abercrombie, Kristy:Kitchen	No	289	2015/12	12/1/2015	12/31/2016	$4,792.00	$227.08	$5,019.08	Remodel		
Drill Down	150000-933272658	Kristy Abercrombie	Abercrombie, Kristy:Remodel Bathroom	Yes	606	2017/10	10/30/2017	10/30/2018	$3,114.00	$0.00	$3,114.00	Remodel		
Drill Down	150000-933272658	Kristy Abercrombie	Abercrombie, Kristy:Remodel Bathroom	No	613	2017/12	12/12/2017	12/12/2018	$7,503.50	$172.63	$7,676.13			
									$15,409.50	$399.71	$15,809.21			

Click on “Drill Down” to show Customer Estimate’s Detail

Estimate line items are displayed

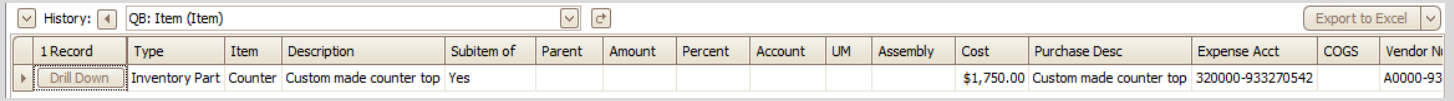


History: QB: Customer Estimate Detail (Estimate #) — Export to Excel

8 Records	Active	Estimate #	Period	Date	Due Date	Type	Item	Description	Qty	Cost	Amount	Markup	Total	Class	Sales Representative
Drill Down		289	2015/12	12/1/2015	12/31/2016	Inventory Part	Appliance	Dishwasher	1.00	$430.00	$430.00	8.86	$430.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016	Inventory Part	Appliance	Oven	1.00	$600.00	$600.00	7.143	$600.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016	Inventory Part	Counter	Custom made counter top	1.00	$1,900.00	$1,900.00	8.5715	$1,900.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016	Service	Removal	Removal labor	16.00	$560.00	$8,960.00		$560.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016		Subs:Electrical	Electrical work	4.00	$231.00	$924.00	5.00	$231.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016		Subs:Tile &Counter	Install tile or counter	12.00	$504.00	$6,048.00	5.00	$504.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016		Subs:Painting	Painting	4.00	$147.00	$588.00	5.00	$147.00	Remodel	
Drill Down		289	2015/12	12/1/2015	12/31/2016		Subs:Plumbing	Plumbing	8.00	$420.00	$3,360.00	5.00	$420.00	Remodel	
									47.00	$599.00	$22,810.00		$4,792.00		

Click on “Drill Down” to show related item

Inventory item.



History: QB: Item (Item) — Export to Excel

1 Record	Type	Item	Description	Subitem of	Parent	Amount	Percent	Account	UM	Assembly	Cost	Purchase Desc	Expense Acct	COGS	Vendor N
Drill Down	Inventory Part	Counter	Custom made counter top	Yes							$1,750.00	Custom made counter top	320000-933270542		A0000-93

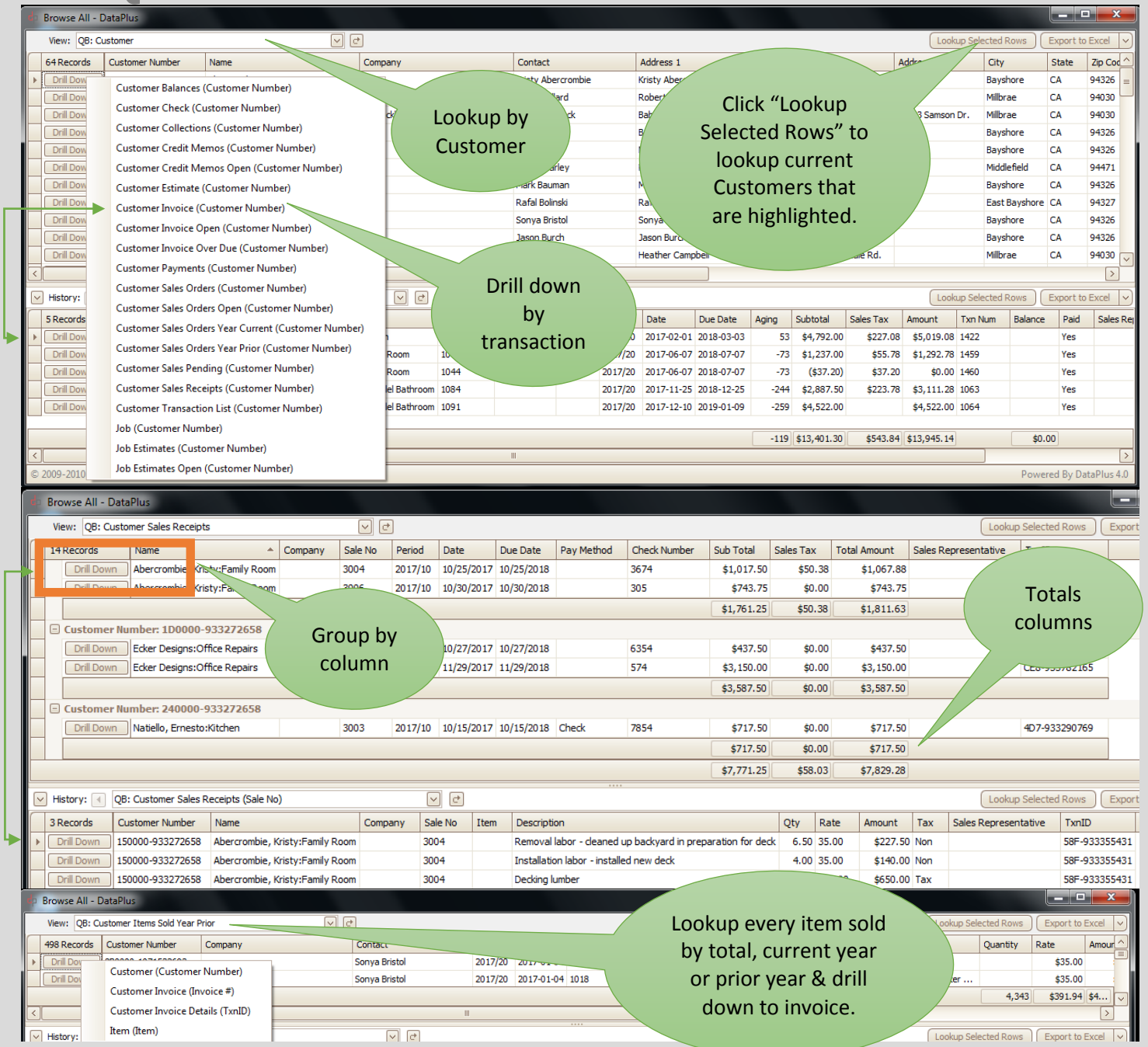
QuickBooks Transactions Browse All Menu

Browse All Menu

DataPlus “Browse All” allows you lookup all transactions in QuickBooks then lookup one or multiple Customers or Vendors.

Grid allows you to group by any column enhancing datamining transactions.

QuickBooks Browse All Transactions Menu



QuickBooks Transactions Browse All

Browse All Menu

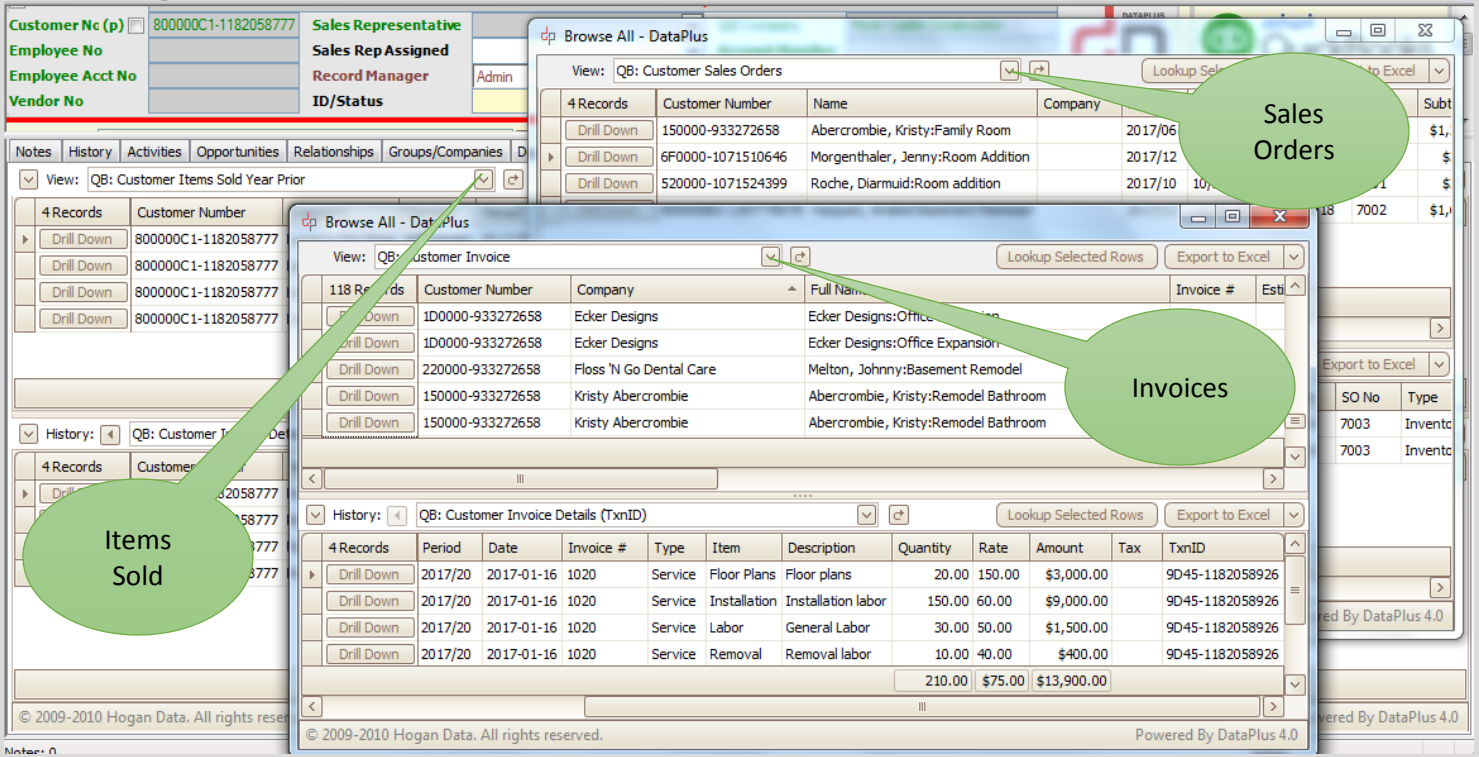
DataPlus allows you to deep dive into multiple instances of “Browse All”.

You can have as many “Browse All” instances you need.

DataPlus allows data mining QuickBooks in Act faster & more efficiently than within QuickBooks.

DataPlus provides an all in one solution for your business.

QuickBooks Browse All Transactions Menu



In most ERP accounting programs you perform a lookup by module. Using DataPlus, you lookup Customer, then drill down and deep dive to specific transactional data. Invoices, Quotes, Estimates, Payments etc.

Or you lookup by transaction, then drill down to related transactions, Customer etc.

More DataPlus Addons

Integrated Software
MS SQL – MySQL – Oracle
SAP – DB2 – Pervasive
FoxPro - MS Access and
more...

Hogan Data – Working For You

Act Certified Consultant – Act Developer
QuoteWerks Partner – QuoteWerks Developer
Sage Software Partner – Sage Software Developer
QuickBooks Partner – QuickBooks Developer

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