



DataPlus Addon Software



Integrate Sage 100 With Act Premium!

- **DataPlus allows data mining Sage 100 in Act faster & more efficiently than within Sage 100.**
- **Sage 100 install is not needed for every Act user.**
- **DataPlus enables you to create/edit Customers – Vendors – Salespersons from Act contacts.**
- **DataPlus provides Sage 100 statistical and historical data in Act fields and view complete transaction data within Act Company & Contact Levels!**
- **DataPlus enables you to create Sage 100 Quotes – Estimates – Sales Orders – Invoices – Purchase Orders for your Sage customers or Vendors from within Act!**
- **DataPlus enables you to import Sage 100 data into Act Custom Tables & Inventory Items to Act Opportunity**

Configure Sage 100 Push

DataPlus 4.0

Manage Permissions

S100 Contact Push

- Customer
- Vendor
- Salesperson

Allows or disallows Act user from creating entity from Act

Configuration For Contact Push

Configure field mapping between Act and Sage 100 to push contacts to Sage 100

You can also edit Customer, Vendor & Salesperson from Act to Sage 100

Configure Sage 100 Push for Customers – Vendors – Salespersons

Permissions

View Permissions Misc Permissions Sales Representatives

	Name	Export	S100 Contact Push	S100 SO Push	View
	Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Restricted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Browse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

User Level

User Permission

Customer Mapping

Vendor Mapping

Salesperson Mapping

Sage 100 Connection Settings

Connection Customer Mapping Vendor Mapping Salesperson Mapping Sales Order Mapping

Company Settings

Company Code: Disable Company Selection:

User:

Password:

Configure Sage 100 Push

DataPlus 4.0 Customer Mapping

- Enable, disable Customer Push
- Mandatory Fields
- Common Fields
- User Defined Fields

Additional User Defined Fields (UDF) can be mapped for Customers

Configure Sage 100 Push for Customer Mapping

Sage 100 Configuration - Configuration - v1.0.*

Sage 100 Connection Settings

Connection Customer Mapping Vendor Mapping Salesperson Mapping Sales Order Mapping

Customer Push Enabled:

Enable Push

Mandatory Fields

Customer No: eCustomerID *

Division No: eCustomerID *

Common Fields

Name: Company

Primary Contact Code: eContactID

Contact Name: Contact

Address 1: Address 1

Address 2: Address 2

Address 3: Address 3

City: City

State: State

Zip Code: Zip Code

Country Code: Country

Telephone: Phone

Extension: Extension

Fax: Fax Phone

E-mail Address: E-mail

Credit Hold: AR Credit Hold

URL Address: Web Site

Credit Limit: AR Credit Limit

Source: Source

User Defined Fields

Source:

Cancel Save

Configure Sage 100 Push

DataPlus 4.0 Vendor Mapping

- Enable, disable Vendor Push
- Mandatory Fields
- Common Fields
- User Defined Fields

Additional User Defined Fields (UDF) can be mapped for Customers

Configure Sage 100 Push for Vendor Mapping

Sage 100 Configuration - Configuration - v1.0.*

Sage 100 Connection Settings

Connection Customer Mapping **Vendor Mapping** Resperson Mapping Sales Order Mapping

Vendor Field Mappings

Vendor Push Enabled: **Enable Push**

Mandatory Fields

Vendor No: * **Mandatory Fields**

Division No: *

Common Fields

Name:	<input type="text" value="Company"/>	Zip:	<input type="text" value="Zip Code"/>
Primary Contact Code:	<input type="text" value="eContactID"/>	Country Code:	<input type="text" value="Country"/>
Primary Contact:	<input type="text" value="Contact"/>	Telephone:	<input type="text" value="Phone"/>
Address 1:	<input type="text" value="Address 1"/>	Extension:	<input type="text" value="Extension"/>
Address 2:	<input type="text" value="Address 2"/>	Fax:	<input type="text" value="Fax Phone"/>
City:	<input type="text" value="City"/>	E-mail Address:	<input type="text" value="E-mail"/>
State:	<input type="text" value="State"/>	URL Address:	<input type="text" value="Web Site"/>

Common Fields

User Defined Fields

Cancel Save

Configure Sage 100 Push

DataPlus 4.0 Salesperson Mapping

- Enable, disable Salesperson Push
- Mandatory Fields
- Common Fields
- User Defined Fields

Additional User Defined Fields (UDF) can be mapped for Customers

Configure Sage 100 Push for Salesperson Mapping

Sage 100 Configuration - Configuration - v1.0.*

Sage 100 Connection Settings

Connection Customer Mapping Vendor Mapping **Salesperson Mapping** Sales Order Mapping

Salesperson Field Mappings

Salesperson Push Enabled:

Mandatory Fields

Salesperson No: *

Division No: *

Common Fields

Name:

Address 1:

Address 2:

City:

State:

Zip:

Country Code:

Telephone:

E-mail Address:

Cancel Save

Create/Edit Customer

Eliminate double entry for your Customer saving you time & provide more consistency between Sage 100 and Act.

- Create Customer in Act
- Convert Contact Prospect to Customer
- When ready, push Customer contact to Sage 100

Push Act Contact as Customer to Sage 100

Push to Sage 100

Push Contact

Choose Sage100 Entity

Customer
Create a Customer in Sage100

Vendor
Create a Vendor in Sage100

Salesperson
Create a Salesperson in Sage100

Nothing Chosen

Back Next

- Choose Sage 100 Entity
- Vendor
- Create a Vendor in Sage 100

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

Review Push Information

Push to Sage 100

Push Contact

Customer Data

Mandatory Fields

Customer No: 01-AdvEnv * Salesperson No: 0200-Shelly Westland *

Common Fields

Company: Advanced Environmental F Country: [Country]

Contact No: 01-AdvEnv-JoeBrooks Phone: (915) 446-3430

Contact: Joe G Brooks Extension:

Address 1: [Address] Fax Phone: (915) 446-3864

Address 2: [Address] E-mail:

Address 3: [Address] Web Site:

City: [City] AR Credit Hold:

State: TX AR Credit Limit:

Zip Code: 76849

Back Next

Push to Sage 100 Notice

Successfully saved Customer

OK

After push, the Customer ID is associated with Act Contact & Sage 100 Customer.

eCustomerID 01-AdvEnv

When you edit contact Customer ID is used to edit associated Customer in Sage 100.

Customer successfully push to Sage 100

Create/Edit Vendor

Eliminate double entry for your Vendor saving you time & provide more consistency between Sage 100 and Act.

- Create Vendor in Act
- Convert Contact Prospect to Vendor
- When ready, push Vendor contact to Sage 100

Push Act Contact as Vendor to Sage 100

Push to Sage 100

Push Contact

Choose Sage100 Entity

Customer
Create a Customer in Sage100

Vendor
Create a Vendor in Sage 100

Salesperson
Create a Salesperson in Sage100

Nothing Chosen

Back Next

- Choose Sage 100 Entity
- Vendor
- Create a Vendor in Sage 100

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

Review Push Information

Push to Sage 100

Push Contact

Vendor Data

Mandatory Fields

Vendor No: 01-BerMan *

Common Fields

Company: Bemidge Manufacturing Co Zip Code: 77026

Contact No: 01-BerMan-JBemidge Country: [Dropdown]

Contact: Jack Bemidge Phone: (210) 650-3050

Address 1: [Field] Extension: [Field]

Address 2: [Field] Fax Phone: (210) 650-0379

City: [Field] E-mail: [Field]

State: TX Web Site: [Field]

Back Next

Push to Sage 100 Notice

Successfully saved Customer

OK

After push, the Vendor ID is associated with Act Contact & Sage 100 Vendor.

eVendorID 01-BerMan

When you edit contact Vendor ID is used to edit associated Vendor in Sage 100.

Vendor successfully push to Sage 100

Create/Edit Salesperson

Eliminate double entry for your Salesperson saving you time & provide more consistency between Sage 100 and Act.

- Create Salesperson in Act
- Convert Contact Prospect to Salesperson
- When ready, push Salesperson contact to Sage 100

Push Act Contact as Salesperson to Sage 100

Push to Sage 100

Push Contact

Choose Sage100 Entity

Nothing Chosen

Customer
Create a Customer in Sage100

Vendor
Create a Vendor in Sage100

Salesperson
Create a Salesperson in Sage100

Back Next

- Choose Sage 100 Entity
- Salesperson
- Create a Salesperson in Sage 100

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

Review Push Information

Push to Sage 100

Push Contact

Salesperson Data

Mandatory Fields

Salesperson No: 01-0800 *

Common Fields

Contact: Peter Smith Zip Code: 92234

Address 1: 1271 West Ave Country: [Dropdown]

Address 2: [Empty] Phone: [Empty]

City: Mecca E-mail: [Empty]

State: CA

Back Next

Push to Sage 100 Notice

Successfully saved Customer

OK

After push, the Salesperson ID is associated with Act Contact & Sage 100 Salesperson.

eSalespersonID 01-0800

When you edit contact Salesperson ID is used to edit associated Salesperson in Sage 100.

Salesperson successfully push to Sage 100

Contact Information

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

Custom Protected Fields

- Warning
- Inactive
- Customer No
- Salesperson No
- Vendor No
- Sales Rep
- Sage 100 Company
- S100 Creation Date
- S100 Last Update

Custom Unprotected Fields

- Direct Line Phone
- Toll Free Phone
- dpFolders
- Time Zone
- Mobile E-mail
- Prospect Number
- Source

Sage 100 Contact Information In Act Field

Act! Premium - Sage100

File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Custom Tables Help

act! Premium Back Forward New Call Meeting To-Do Note History

Detail View List View 12 of 62 dpS100-SF

WARNING: Customer data will be overwritten by Sage 100

<input checked="" type="checkbox"/> Primary	Customer No	01-ABF	Sales Rep	Jim Kentley	ID/Status	Customer
	Contact No C/V	01-ABF-ARTIE JOHN	Salesperson No	01-0100	Type	A2
	Employee No		Contact Ref No	01-ABF	Prospect Number	
	Vendor No		Record Manager	Jim Kentley	Source	Sage 100

Contacts

Company	American Business F...	Address	2131 N. 14th Street	Creation Date	6/14/2006
Contact		<input type="checkbox"/> Residential	Suite 100	Last Update	6/14/2006
Salut			Accounting Department	Imported	Yes
D		City	Milwaukee	Mandatory Fields	
Di		State	WI		
Status		County			
		E-mail	artie@sage.sample.com		
		Web Site	www.abf.com		
		Referred By			
		Address Block			

Integrate Sage 100 with Act! using... DATAPLUS

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.
- Sage 100 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 Sage 100. Sage 100 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

Sage 100 Financial History In Act Field

WARNING: Customer data will be overwritten by Sage 100

CUSTOMER FINANCIAL HISTORY

INVOICE/SALES + PURCHASE HISTORY

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2020			\$407.40	\$1,113.05	\$3,191.72								\$4,712.17

Summary:

Count	Prior Total	Prior YTD	Current YTD	Difference	Total	Invoice Date
				%	10	First: 3/1/2020
Total				\$0.00	\$4,712.17	Last: 5/31/2020

ORDER HISTORY

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2020					\$8,306.54								\$8,306.54

QUOTE

Quotes	New	Hold	Orders	New	Hold	Jobs	Status	Rev Est	Rev Contract	% Complete	JTD Cost	JTD Billed	JTD Receipt
Count			Count	3		Bid							
Amount			Amount	8,306.54		Open							
	Open			Open		Hold							
						Late							
						Complete							

Financial History custom fields are shared between Customer, Vendor and Salespersons from Sage 100.

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

Sage 100 Information In Act Field

Detail View | List View | 12 of 62 | dpS100-SF | dpHistory

WARNING: Customer data will be overwritten by Sage 100

Primary

Customer No: 01-ABF | Sales Rep: Jim Kentley | ID/Status: Customer
 Contact No C/V: 01-ABF-ARTIE JOHN | Salesperson No: 01-0100 | Type: A2
 Employee No: | Contact Ref No: 01-ABF | Prospect Number: | Source: Sage 100
 Vendor No: | Record Manager: Jim Kentley

Notes | History | Activities | Opportunities | Relationships | Groups/Companies | **Financial Info** | Financial History | Emp/Salesperson | Address | Status | Web Info | Social Updates | DataPlus | dpFolders | Timeline

CUSTOMER FINANCIAL INFORMATION

ACCOUNTS RECEIVABLE INFORMATION

Date Established: 1/1/2019 | Discount Rate: |
 Default Item Code: WIDGET (8" x 10" W) | Fin Charge Rate: 1.500
 Default Pymt Type: Find | Last Fin Charge Date: 4/30/2020
 Date of Last Activity: 5/31/2020

Batch Fax | Open Item Customer
 Email Statements | Print Dunn Message
 Internet Enabled | Temporary Customer

AR Price Level: 1 | Statement Cycle: M
 Last Pymt Amount: \$864.25 | Last Stmt Date: 5/31/2020
 Last Pymt Date: 5/31/2020 | Tax Exempt No: |
 Terms Code: 01-Net 30 Days | Tax Schedule: WI MILMIL
 Primary Ship To: 2-American Business Fut | Sort: AMER
 Ship Code: UPS BLUE | Location Code: |

Comment: Call Ed for credit approval.

AGING

Invoice Amt	As Of	Current	30	31 - 60	61 - 90	90 +	Total Due
	5/31/2020	\$3,252.38	\$1,222.58	\$1,257.40			\$5,732.36
	Overdue	To Pay	CR Limit	Unpaid Fin	Open Ord Amt	Cr Limit Over	Highest Bal
Avg Days	4	<input checked="" type="checkbox"/> CR Hold	\$120,000.00	\$43.89	\$8,422.64		\$5,732.36

ACCOUNTS PAYABLE INFORMATION

Avg Days: | Overdue: | To Pay: |
 Last Check: | Terms Code: | Batch Fax
 Last Purchase Date: | Taxpayer ID No: | Credit Card Vendor
 Last Payment Date: | Tax Schedul: | Exemption No On File
 AP Balance Due: | Refer: | Hold Payment
 Default Box No: | So: | Misc Box 9
 Default Form: | Separate Check
 GL Account: | Temporary Vendor
 Comment: | Use PO Receipt

ITEMS SOLD / PURCHASED

Every item
Customer
purchased is
listed and
updated daily!

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

Sage 100 Additional Address Fields

Detail View | List View | 12 of 62 | dpS100-SF | dpHistory

WARNING: Customer data will be overwritten by Sage 100

<input checked="" type="checkbox"/> Primary	Customer No 01-ABF	Sales Rep Jim Kentley	ID/Status Customer
Contact No C/V 01-ABF-ARTIE JOHN	Salesperson No 01-0100	Type A2	Prospect Number
Employee No	Contact Ref No 01-ABF	Source Sage 100	
Vendor No	Record Manager Jim Kentley		

Notes | History | Activities | Opportunities | Relationships | Groups/Companies | Documents | Financial Info | Financial History | Emp/Sa | **Address** | Status | Web Info | Social Updates | DataPlus | dpFolders | Timeline

PRIMARY CONTACT ADDRESS	CUSTOMER SHIP TO ADDRESS	HOME ADDRESS
Address 2131 E. 14th Street Suite 100 Accounting Department	Address Racine Warehouse 5411 Kendrick Place	Address
City New Berlin	City Racine	City
State WI	State WI	State
Country USA	Country USA	Country
Phone (414) 555-4787	Phone (414) 555-4319	Phone
Alt Phone (414) 555-4787	Alt Phone	Spouse
Fax (414) 555-4512	Fax	E-mail
E-mail artie@sage.sample.com	E-mail	
Notes Call between 9:00am and 5:00pm, Monday through Friday.	Code 2-American Business Futu	
	Company American Business Futures	
	Contact No JOHN QUINN	
	Contact John Quinn	

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

Sage 100 Employee Information

Act! Premium - Sage100

File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Custom Tables Help

act! Premium Back Forward New Call Meeting To-Do Note History E-mail Search Go

Detail View List View 8 of 8 dpS100-SF dpHistory

Customer No Sales Rep ID/Status Salesperson
Contact No C/V Salesperson No 01-0200 Type
Employee No Contact Ref No Prospect Number
Vendor No Record Manager Shelly Westland Source Sage 100

Company ABC Distribution and Service Corp. Address 1271 West Ave

Notes History Activities Opportunities Relationships Groups/Companies Documents Financial Info Financial History Emp/Salesperson Status Web Info Social Updates DataPlus dpFolders Timeline

SALES REPRESENTATIVE INFORMATION

PR Status
Commission Rate 8.00
Salesperson Mgr Contact
Salesperson Mgr Division
Salesperson Mgr No

EMPLOYEE INFORMATION

Hire Date / Comment
Review Date / Comment
Term Date / Comment
Emrg Contact / Phone
Marital Status
Gender Birth Date

EMPLOYEE TAX INFORMATION

Tax Status Federal State
Filing Status
W/C Code
Dependent Exemptions
Personal Exemptions
Override Tax Calc
Override Amount
W2 Consent Signed

Labor
Primary State Autopay Hours
Pay Cycle Pay Rate 1
Pay Method Pay Rate 2
Benefit SU1 State EIC

You can choose to import Salesperson data into Act and set field level permissions to "No Access" to protect the 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.

Sage 100 / Act Unique IDs

Contact Status

Sage 100 ID's

- eCustomerID
- eLocationID
- eEmployeeID
- eVendorID
- eActContactID
- S100 Last Import

DataPlus Help Links

WARNING: Customer data will be overwritten by Sage 100

Sage 100

Sage 100 ERP ID'S

eCustomerID	01-ABF
eLocationID	01-ABF
eContactID	01-ABF-ARTIE JOHN
eContactReferenceID	01-ABF
eEmployeeID	
eSalespersonID	
eVendorID	
S100 Last Update	10/2/2018 6:29 AM
eActContactID	
Application Company	01-ABC / ABC Distribution and Service Corp.

extend act!
Complete your CRM solution

DataPlus cloud
interface software solution

DATAPLUS V4.0.04092016

DataPlus Knowledge Base <http://kb.hogandata.com>

Online Support <http://help.hogandata.com>

Help Desk <http://helpdesk.hogandata.com>

Client Portal <http://hogandata.com/clients>

ACTeStore.com <http://ACTeStore.com>

Sign up for Act! eMarketing <http://www.swiftpage.com>

Sage 100

Sage 100 Web Site <http://na.sage.com/us/erp/sage-100-erp>

Sage Customer Portal <http://na.sage.com/us/log-on>

Unique ID's are used to map contact in Sage 50 with Act contact or company.

The eIDs are used for importing data from Sage 100 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

Sage 100 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

Sage 100 Item List Imported to Act Product List

Item Code	Description	Prod	Procure	Vendor No.
1001-HON-H252	HON 2 DRAWER LETTER FILE W/O LK	WF&A	Buy	01-CONT
1001-HON-H252LK	HON 2 DRAWER LETTER FILE W/ LCK	WF&A	Buy	01-CONT
1001-HON-H254	HON 4 DRAWER LETTER FILE W/O LK	WF&A	Buy	01-CONT
1001-HON-H254LK	HON 4 DRAWER LETTER FILE W/ LCK	WF&A	Buy	01-CONT
2480-8-50	DESK FILE 8" CAP 50	FD&A	Buy	01-UNITED
2481-5-50	DESK FILE 5 1/4" CAP 50	FD&A	Buy	01-UNITED
2551-3-50	DESK FILE 3 1/2" CAP 50	FD&A	Buy	01-UNITED
2568-3-25	DESK FILE 3 1/2" CAP 25	FD&A	Buy	01-UNITED
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	PS&A	Buy	01-CONT
6650-26-16-11	SOUND CVR 26"W 16"D 11"H DM	PS&A	Buy	01-CONT
6652-28-24-15	SOUND CVR 28"W 24"D 15"H LQ	PS&A	Buy	01-CONT
6655	PRINTER STAND W/ BASKET	PS&A	Buy	01-CONT
6657-24-20-12	SOUND CVR 24.5"W 20"D 12"H LQ	PS&A	Buy	01-CONT
8953	UNIVERSAL 3 1/2" SDDD FLEX DSK	FD&A	Buy	01-UNITED

Sage 100 Item List

Act Opportunity Product List

Import Settings for Sage 100 Item Type

Name	Item Number	Cost	Price
A-B SWITCH - 25-PIN	BB1850	\$0.0000	\$0.0000
AM/FM/STEREO	AM/FM STEREO	\$300.0000	\$600.0000
AM/FM/STEREO/CASSE	STEREO/CD PCK	\$1,000.0000	\$2,800.0000
ART SPECIALTY BRONZ	ARS-9301	\$58.1600	\$119.9500
ART SPECIALTY EMP C	ARS-9401	\$64.7500	\$129.9500
ART SPECIALTY GINGE	ARS-9201	\$47.4500	\$94.9500
ART SPECIALTY WALNL	ARS-9101	\$44.5000	\$89.9500
BOOK BIN W/FLUORES	D1000-BBWLIGH	\$65.0000	\$130.0000
CASTERS (SET OF 4, 2"	VOG-CM-CASTEI	\$13.2500	\$22.0000
CENTRONICS CABLE 1(GB-EQ380-10-MF	\$16.7500	\$34.5000
CENTRONICS CABLE 1(GB-EQ380-10-MM	\$16.7500	\$34.5000
CENTRONICS CABLE 5	GB-EQ380-5-MF	\$12.7500	\$30.2500
CENTRONICS CABLE 5	GB-EQ380-5-MM	\$12.7500	\$30.2500
CHROME LUGGAGE AN	CHROME KIT	\$300.0000	\$700.0000
CHROME LUGGAGE RA	LUGGAGE RACK	\$200.0000	\$500.0000
CHROME SIDE RAILS	SIDE RAILS	\$50.0000	\$100.0000
COWHIDE LEATHER SE	LEATHER SEATS	\$800.0000	\$1,600.0000

View: S100: Act Opportunity Settings Items

6 Records	type	key	value
Drill Down	opportunity_inventory_items	import	true
Drill Down	Finished Goods	import_type	true
Drill Down	Unknown Items	import_type	false
Drill Down	Charge Items	import_type	false
Drill Down	Comment Items	import_type	false
Drill Down	Miscellaneous Items	import_type	false

Act Opportunity Product list mirrors Sage 100 Item List, giving you the most current items from Sage 100 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

Sage 100 Transactions Imported to Act Opportunity

Opportunity
Name: 01-ABF / American Business Futures <INV 0100041>

Totals
Total: \$33.20
Weighted: \$33.20
Probability: 100

Open/Close Days
Open Date: 5/31/2020
Days Open: -607
Est. Close Date: 5/31/2020
Act. Close Date: 10/2/2018

Status
 Open
 Closed - Won
 Closed - Lost
 Inactive

Process/Stage
Process: ACT! Sales Cycle
Stage: Commitment to Buy

DATAPLUS
Act! Opportunity Import

Act Opportunity Statistics

Sage 100 Transaction Statistics

Opportunity Statistics

Customer
Customer No: 01-ABF
Company: American Business Futures
Salesperson No: 01-0100
Sales Representative: Jim Kentley
Record Manager: Jim Kentley
Comment:

Document
Number: 0100041
Reference Number:
Type: Invoice
Status: Closed/Invoiced
Terms: 01 / Net 30 Days
Dates:
Create: 5/31/2020
Date: 5/31/2020
Ship: 5/31/2020
Expiration: 6/30/2020
Expiration Days: -577

Item List
2480-8-50

Sage 100 Transaction Comments

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.

Sage 100 Transactions Menu

Transaction Menu

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

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

In addition, Browse All Menu provides all transactions & drill down to more details or to related transactions.

DataPlus Transactions Menu for Sage 100

The screenshot shows the Sage 100 DataPlus interface. The top menu bar includes File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, Emarketing, Custom Tables, and Help. The main window displays a contact record for 'Orange Door & Window Co.' with fields for Customer No, Sales Rep, Contact No, Employee No, Vendor No, Company, Contact, Salutation, Department, Phone, Mobile, Direct Line, and Division. A 'DataPlus Transaction Menu' callout points to the 'Browse All' button in the 'View' dropdown. Another callout points to the 'Browse All' button in the 'History' dropdown.

View:	Customer No	Company	Order No	Period	Order Date	Order Type	Cycle Code	Cust PO	Last Order Date	Last Order No	Expire Date	Status	Reason	Warehouse	Taxable	Nontaxable	Freight
1 Record	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	Repeating					12/31/6009	Hold	DELAY	001 / EAST WAREHOUSE		\$1,195.88	

History:	Customer No	Company	Order No	Period	Order Date	Promise Date	Order Type	Line	Item Type	Item Code	Item Description	Ordered	Back Ordered	Quantity	Unit Price	Extension	Com
6 Records	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000001	Finished Good	6655	PRINTER STAND W/ BASKET	3	0	0	\$179.00	\$537.00	
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000002	Finished Good	8953	UNIVERSAL 3 1/2" SSDD FLEX DSK	100	0	0	\$4.23	\$422.80	
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000003	Finished Good	ARS-9101	ART SPECIALTY WALNUT CNDL LAMP	1	0	0	\$89.95	\$89.95	
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000004	Finished Good	GB-EL04MS-25	RJ-11 4 WIRE MOD CABLE 25 FT	10	0	0	\$4.61	\$46.13	
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000005	Unknown	*	HANDLING CHARGES	0	0	0	\$0.00	\$100.00	
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000006	Comment	C02		0	0	0	\$0.00	\$0.00	REFL

The screenshot shows the 'Browse All - DataPlus' window. It displays a list of transactions with columns for Customer No, Company, Order No, Period, Order Date, Promise Date, Order Type, Line, Item Type, Item Code, and Item Description. A 'Transaction Details' callout points to the 'History' dropdown.

View:	Customer No	Company	Order No	Period	Order Date	Order Type	Cycle Code	Cust PO	Last Order Date	Last Order No	Expire Date
2 Records	02-ATOZ	A To Z Carpet Supply	0000104	2020/04	4/20/2020	Repeating		VERBAL			4/20/2020
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	Repeating					12/31/6009

History:	Customer No	Company	Order No	Period	Order Date	Promise Date	Order Type	Line	Item Type	Item Code	Item Description
6 Records	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000001	Finished Good	6655	PRINTER STAND W/
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000002	Finished Good	8953	UNIVERSAL 3 1/2" SS
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000003	Finished Good	ARS-9101	ART SPECIALTY WAL
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000004	Finished Good	GB-EL04MS-25	RJ-11 4 WIRE MOD C
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000005	Unknown	*	HANDLING CHARGES
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000006	Comment	C02	

Sage 100 Transactions Menu

Browse All

Customer Sales Order Repeating – Drill down to details

Customer Sales Orders – Drill down to details

Customer Invoices – Drill down to Sales Orders

DataPlus Browse All Menu for Sage 100

Browse All - DataPlus

View: \$100: Customer Sales Order Repeating

2 Records	Customer No	Company	Order No	Period	Order Date	Order Type	Cycle Code	Cust PO	Last Order Date	Last Order No	Expire Date	Status	Reason	Warehouse	Taxable	Nontaxable	Freight	Discou
Drill Down	02-ATOZ	A To Z Carpet Supply	0000104	2020/04	4/20/2020	Repeating		VERBAL			4/20/2020	Open		001 / EAST WAREHOUSE	\$4,052.78	\$15.00	\$36.00	\$8
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	Repeating					12/31/6009	Hold		001 / EAST WAREHOUSE		\$1,195.88		\$17
															\$4,052.78	\$1,210.88	\$36.00	\$2...

History: \$100: Customer Sales Order Detail (Order No)

6 Records	Customer No	Company	Order No	Period	Order Date	Promise Date	Order Type	Line	Item Type	Item Code	Item Description	Quantity	Unit Price	Extension	Comment			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000001	Finished Good	6655	PRINTER STAND W/ BAS	0	0	\$179.00	\$537.00			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000002	Finished Good	8953	UNIVERSAL 3 1/2" SSDD FLEX	0	0	\$4.23	\$422.80			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000003	Finished Good	ARS-9101	ART SPECIALTY WALNUT ONDL LAMP	1	0	\$89.95	\$89.95			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000004	Finished Good	GB-EL04MS-25	RJ-11 4 WIRE MOD CABLE 25 FT	10	0	\$4.61	\$46.13			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020	12/31/6009	Repeating	000005	Unknown	*	HANDLING CHARGES	0	0	\$0.00	\$100.00			
Drill Down	02-ORANGE	Orange Door & Window Co.	0000103	2020/05	5/31/2020		Repeating	000006	Comment	C02		0	0	\$0.00	\$0.00 REFUND FO			
															114	0	\$46.30	\$1,195.88

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Create Lookup In Act!

Browse All - DataPlus

View: \$100: Customer Sales Order

32 Records	Customer No	Company	Order ...	Period	Order Date	Order Type	Cycle Code	Cust PO	Last Order Date	Last Order No	Expire Date	Status	Reason	Warehouse	Taxable	Nontaxable	Fre
Drill Down	02-AMERCON	American Concrete Service	0000149	2020/05	5/23/2020	Back Order			5/28/2020	0100010	5/23/2020	Open		002 / WEST WAREHOUSE	\$3,201.56		
Drill Down	01-BRESLIN	Breslin Parts Supply	0000152	2020/05	5/11/2020	Back Order			5/15/2020	0100035	5/11/2020	Open		001 / EAST WAREHOUSE	\$422.80		
Drill Down	01-ABF	American Business Futures	0000153	2020/05	5/11/2020	Back Order		XX-890200	5/15/2020	0100033	5/13/2020	New		001 / EAST WAREHOUSE	\$485.06		
Drill Down	02-ATOZ	A To Z Carpet Supply	0000156	2020/05	5/15/2020	Standard			5/31/2020		5/31/2020	New		001 / EAST WAREHOUSE	\$159.60		
Drill Down	02-CUSTOM	Custom Craft Products	0000157	2020/05	5/15/2020	Standard			5/31/2020		5/31/2020	New		001 / EAST WAREHOUSE	\$777.00		
Drill Down	02-AUTOCR	Autocraft Accessories	0000158	2020/05	5/15/2020	Standard			5/31/2020		5/31/2020	New		001 / EAST WAREHOUSE	\$1,800.00		
															\$59,732.14	\$291,834.09	

History: \$100: Customer Sales Order Detail (Order No)

1 Record	Customer No	Company	Order No	Period	Order Date	Promise Date	Order Type	Line	Item	Ordered	Back Ordered	Quantity	Unit Price	Extension	Comment	Comms		
Drill Down	01-BRESLIN	Breslin Parts Supply	0000152	2020/05	5/11/2020	5/11/2020	Back Order	000001	Finished	100	100	0	\$4.23	\$422.80		Yes		
															100	100	\$4.23	\$422.80

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Sort By Any Column

Browse All - DataPlus

View: \$100: Customer Invoice

19 Records	Customer No	Company	Invoice No	Type	Source	Posted	Period	Date	Order No	Ship To	Source Journal	Taxable	NonTaxable	Freight	Sales Tax	Discount	Invoice Total	
Drill Down	01-BRESLIN	Breslin Parts Supply	0100035	Invoice	S/O	Yes	2020/05	5/15/2020	0000152	Breslin Parts Supply		\$132.50	\$10.00	\$6.63			\$149.1	
Drill Down	01-BRESLIN	Breslin Parts Supply	0100040	Invoice	S/O	Yes	2020/05	5/15/2020	0000152	Breslin Parts Supply	SO-000001	\$9,130.25	\$10.00	\$456.51			\$9,596.7	
Drill Down	01-BRESLIN	Breslin Parts Supply	0100044	Invoice	A/R	Yes	2020/05	5/21/2020	0000152	Breslin Parts Supply	AR-000004	\$572.50	\$0.00	\$28.63			\$1,646.1	
Drill Down	01-INACTIV	Inactive Customer **INACTIVE**	0100056	Invoice	A/R	Yes	2020/05	5/6/2020	0000152	Inactive Customer	AR-000005	\$27.00	\$0.00	\$17.95			\$324.2	
Drill Down	01-SHEPARD	Shepard Motorworks	0100045	Invoice	S/O	Yes	2020/05	5/31/2020	0000166	Shepard Motorworks		\$283,500.00	\$0.00	\$0.00			\$283,500.0	
Drill Down	02-CUSTOM	Custom Craft Products	0100037	Invoice	S/O	Yes	2020/05	5/15/2020	0000146	Custom Craft Products		\$46.00	\$160.11	\$1,560.2			\$1,766.3	
Drill Down	02-GREAR	Greaser Alarm Company	0100046	Invoice	S/O	Yes	2020/05	5/31/2020	0000167	Greaser Alarm Company	SO-000003	\$385.50	\$0.00	\$0.00			\$385.5	
															\$0.00	\$283,500.00	\$0.00	\$0.00

History: \$100: Customer Sales Order (Order No)

1 Record	Customer No	Company	Order No	Period	Order Date	Order Type	Cycle Code	Cust PO	Last Order Date	Last Order No	Expire Date	Status	Reason	Warehouse	Taxable	Nontaxable	Freight	Discount
Drill Down	01-SHEPARD	Shepard Motorworks	0000166	2020/05	5/30/2020			2233	1/1/1900		1/1/1900	Closed		001 / EAST WAREHOUSE	\$283,500.00			

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Filter By Any Column

Sage 100

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.

Sage 100 Transactions Menu

Customer	
Company Customer	
Customer	
Customer Auto Increment No	
Customer Contact	
Customer Contact Associated	
Customer Contact Associated - CRN	
Customer Invoice	
Customer Invoice Deleted	
Customer Invoice History	
Customer Invoice Open	
Customer Invoice Repetitive	
Customer Invoice Year Current	
Customer Invoice Year Prior	
Customer Invoice Year Prior YTD	
Customer Items Sold	Customer Level
Customer Items Sold Month Current	Customer Memo
Customer Items Sold Month Prior	Customer Payment
Customer Items Sold Top	Customer Payment Year Current
Customer Items Sold Top YTD	Customer Payment Year Prior
Customer Items Sold Year Current	Customer Quote
Customer Items Sold Year Prior	Customer Quote Open
	Customer Sales History By Period
	Customer Sales Order
	Customer Sales Order Back Order
	Customer Sales Order Hold
	Customer Sales Order New
	Customer Sales Order Open
	Customer Sales Order Repeating
	Customer Sales Order Year Current
	Customer Sales Order Year Prior
	Customer Ship To
	Customer Ship To Address

Salesperson	
Salesperson	
Salesperson Invoice Commission	
Salesperson Invoice History	
Salesperson Invoice Open	
Salesperson Invoice Repetitive	
Salesperson Sales Analysis	
Salesperson Sales History By Period	
Salesperson Sales Order	

Vendor	
Company Vendor	
Vendor	
Vendor Contact	
Vendor Contact Associated	
Vendor Invoice	
Vendor Invoice Open	
Vendor Item	
Vendor Memo	
Vendor Payment	
Vendor Purchase Address	
Vendor Purchase By Period	
Vendor Purchase Order	
Vendor Remit To	

Inactive	
Inactive Customer	
Inactive Vendor	

Inventory	
Inventory Item	
Inventory Item History	
Inventory Item Quantity	
Inventory Item Transaction	
Inventory Item Warehouse	
Inventory Lot/Serial	
Inventory Lot/Serial Customer	
Inventory Lot/Serial Vendor	
Inventory Sales Order Line Items	

Sage 100
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.

Sage 100 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																	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		

**Sage 100
Transactions Browse
All Menu
Browse All Menu**

DataPlus "Browse All" allows you to lookup all transactions in Sage 100 then lookup one or multiple Customers or Vendors.

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

Sage 100 Browse All Transactions Menu

Lookup by Customer

Drill down by transaction

Click "Lookup Selected Rows" to lookup current Customers that are highlighted.

Customer Number	Name	Company	Contact	Address 1	Address 2	City	State	Zip Code
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Kristy Abercrombie	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Robert Ward	10000-933272658		Millbrae	CA	94030
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Millbrae	CA	94030
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Middlefield	CA	94471
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		East Bayshore	CA	94327
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Bayshore	CA	94326
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Babette	10000-933272658		Millbrae	CA	94030

Group by column

Totals columns

Customer Number	Name	Company	Sale No	Period	Date	Due Date	Pay Method	Check Number	Sub Total	Sales Tax	Total Amount	Sales Representative
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	3004	2017/10	10/25/2017	10/25/2018		3674	\$1,017.50	\$50.38	\$1,067.88	
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	3005	2017/10	10/30/2017	10/30/2018		305	\$743.75	\$0.00	\$743.75	
									\$1,761.25	\$50.38	\$1,811.63	
Customer Number: 1D0000-933272658												
150000-933272658	Ecker Designs:Office Repairs	Ecker Designs		2017/10	10/27/2017	10/27/2018		6354	\$437.50	\$0.00	\$437.50	
150000-933272658	Ecker Designs:Office Repairs	Ecker Designs		2017/10	11/29/2017	11/29/2018		574	\$3,150.00	\$0.00	\$3,150.00	CEO-933782165
									\$3,587.50	\$0.00	\$3,587.50	
Customer Number: 240000-933272658												
150000-933272658	Natiello, Ernesto:Kitchen	Natiello, Ernesto	3003	2017/10	10/15/2017	10/15/2018	Check	7854	\$717.50	\$0.00	\$717.50	4D7-933290769
									\$717.50	\$0.00	\$717.50	
									\$7,771.25	\$58.03	\$7,829.28	

Lookup every item sold by total, current year or prior year & drill down to invoice.

Customer Number	Name	Company	Contact	Quantity	Rate	Amount					
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Sonya Bristol	2017/20	2017-01-04	1018					
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Sonya Bristol	2017/20	2017-01-04	1018					
150000-933272658	Abercrombie, Kristy:Family Room	Abercrombie, Kristy	Sonya Bristol	2017/20	2017-01-04	1018					

Sage 100

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 Sage 100 in Act faster & more efficiently than within Sage 100.

DataPlus provides an all in one solution for your business.

Sage 100 Browse All Transactions Menu

The screenshot displays the Sage 100 interface with three overlapping 'Browse All' windows. The top window shows 'Customer Sales Orders' with columns for Customer Number, Name, Company, and Subtotal. The middle window shows 'Customer Invoice' with columns for Customer Number, Company, Full Name, Invoice #, and Estimate. The bottom window shows 'Customer Invoice Details (TxnID)' with columns for Period, Date, Invoice #, Type, Item, Description, Quantity, Rate, Amount, Tax, and TxnID. Three green callout boxes are overlaid on the image: one pointing to the 'Sales Orders' window, one pointing to the 'Invoices' window, and one pointing to the 'Items Sold' window. The 'Items Sold' window is partially obscured by the 'Invoices' window. The bottom window shows a detailed list of invoice items with their respective quantities, rates, and amounts.

Customer Number	Name	Company	Subt
150000-933272658	Abercrombie, Kristy:Family Room	2017/06	\$1,
6F0000-1071510646	Morgenthaler, Jenny:Room Addition	2017/12	\$
520000-1071524399	Roche, Diarmuid:Room addition	2017/10	\$

Customer Number	Company	Full Name	Invoice #	Esti
1D0000-933272658	Ecker Designs	Ecker Designs:Office		
1D0000-933272658	Ecker Designs	Ecker Designs:Office Expansion		
220000-933272658	Floss 'N Go Dental Care	Melton, Johnny:Basement Remodel		
150000-933272658	Kristy Abercrombie	Abercrombie, Kristy:Remodel Bathroom		
150000-933272658	Kristy Abercrombie	Abercrombie, Kristy:Remodel Bathroom		

Period	Date	Invoice #	Type	Item	Description	Quantity	Rate	Amount	Tax	TxnID
2017/20	2017-01-16	1020	Service	Floor Plans	Floor plans	20.00	150.00	\$3,000.00		9D45-1182058926
2017/20	2017-01-16	1020	Service	Installation	Installation labor	150.00	60.00	\$9,000.00		9D45-1182058926
2017/20	2017-01-16	1020	Service	Labor	General Labor	30.00	50.00	\$1,500.00		9D45-1182058926
2017/20	2017-01-16	1020	Service	Removal	Removal labor	10.00	40.00	\$400.00		9D45-1182058926
						210.00	\$75.00	\$13,900.00		

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.

Create Sage 100 Sales Order

Sage 100 Create Sales Order

When configuring DataPlus to create Sage 100 transactions, creating Sales Order is enabled.

DataPlus allows you to create a Sales Order from the current contact in Act.

Sage 100 does not have to be installed on the PC creating the Sales Order.

After completion of Sales Order & a quick sync is performed, the Sales Order is now visible in Act relating with associated contact.

Current Act Contact

Item lookup directly from QuickBooks

Create Sales Order

1 Record	Number	Name	Company	Period	Date	Due Date	SO No	Subtotal	Sales Tax	Amount	Balance
Drill Down	2059711	Babcock's Music Shop	Babcock's Music Shop	2018/05	05/05/2018	5/20/2018	7007	\$16,700.00	\$62.00	\$16,762.00	

4 Records	Due Date	SO No	Type	Item	Description	Qty	UM	Rate	Amount	Tax	Inv
Drill Down	5/20/2018	7007	Service	Concrete Slab	Foundation slab - prep and pouring	1.00		10000.00	\$10,000.00	Non	0
Drill Down	5/20/2018	7007	Service	Framing	Framing labor	1.00		5500.00	\$5,500.00	Non	0
Drill Down	5/20/2018	7007	Inventory Part	Electrical Materials	Electrical Materials	1.00		800.00	\$800.00	Tax	0
Drill Down	5/20/2018	7007	Other Charge	Equip Rental	Equipment Rental	2.00		200.00	\$400.00	Non	0

Sales Order

Sales Order Details

Sage 100 Create Invoice from Act Opportunity

When configuring DataPlus to create Sage 100 transactions, creating Invoice from Act Opportunity(s) is enabled.

DataPlus allows you to create an invoice from current lookup opportunity or from search.

Sage 100 does not have to be installed on the PC creating the Invoice.

After completion of Invoice & a quick sync is performed, the Invoice is now visible in Act relating with associated contact.

Create Sage 100 Invoice – Act Opportunity

Name: Counter Tops (BabcockMusic)

Totals:
 Total: \$5,399.98
 Weighted: \$540.00
 Probability: 10
 Gross Margin: \$1,549.98

Days Open:
 Open Date: 5/5/2018
 Days Open: 0
 Est. Close Date: 5/5/2018
 Act. Close Date:

Status:
 Open
 Closed - Won
 Closed - Lost
 Inactive

Process/Stage:
 Process: ACT! Sales Cycle
 Stage: Initial Communication

Customer Number: [Redacted]
Company: [Redacted]
Record Manager: Admin
Vendorr Number: [Redacted]
Sales Representative: [Redacted]
Document No: [Redacted]
Document Type: [Redacted]
Document Job: [Redacted]
Notes: [Redacted]

Creation Date: [Redacted]
Last Update: [Redacted]

DATAPLUS
Act! Opportunity Import

Name	Item #	Quantity	Cost	Price	Adjusted Price	Discount	Subtotal
Custom counters	Cabinets - Custom	1.00000	\$2,100.00	\$3,500.00	\$3,500.00	0.00000%	\$3,500.00
Custom made counter top	Counter	1.00000	\$1,750.00	\$1,899.98	\$1,899.98	0.00000%	\$1,899.98

Company: Babcock's Music Shop
Address Block: Babcock's Music Shop
Contact: Kristie Babcock

View: QB: Customer Sales Orders

1 Record	nber	Name	Company	Period	Date	Due Date	SO No	Subtotal	Sales Tax	Amount	Balance
Drill Down	2059711	Babcock's Music Shop	Babcock's Music Shop	2018/05	05/05/2018	5/20/2018	7007	\$16,700.00	\$62.00	\$16,762.00	

History: QB: Customer Sales Orders Details (SO No)

4 Records	Due Date	SO No	Type	Item	Description	Qty	UM	Rate	Amount	Tax	Inv
Drill Down	5/20/2018	7007	Service	Concrete Slab	Foundation slab - prep and pouring	1.00		10000.00	\$10,000.00	Non	0
Drill Down	5/20/2018	7007	Service	Framing	Framing labor	1.00		5500.00	\$5,500.00	Non	0
Drill Down	5/20/2018	7007	Inventory Part	Electrical Materials	Electrical Materials	1.00		800.00	\$800.00	Tax	0
Drill Down	5/20/2018	7007	Other Charge	Equip Rental	Equipment Rental	2.00		200.00	\$400.00	Non	0

Sales Order
Sales Order Details

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

Sage 100 Partner – Sage 100 Developer



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