HOGAN DATA
Managing Your Information!

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

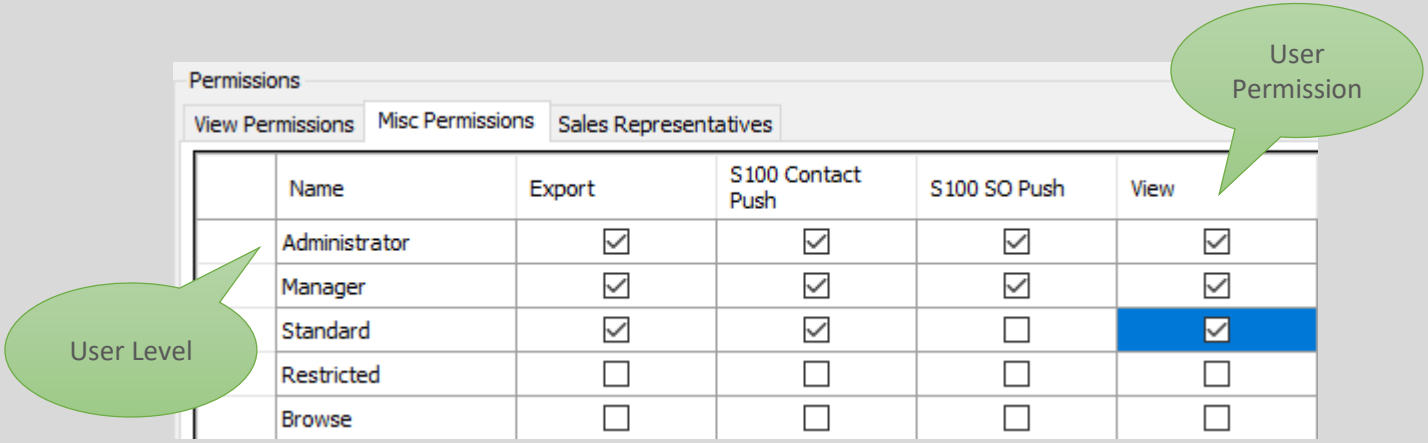
Configure Sage 100 Push for Customers – Vendors – Salespersons

DataPlus 4.0 Manage Permissions

S100 Contact Push

- Customer
- Vendor
- Salesperson

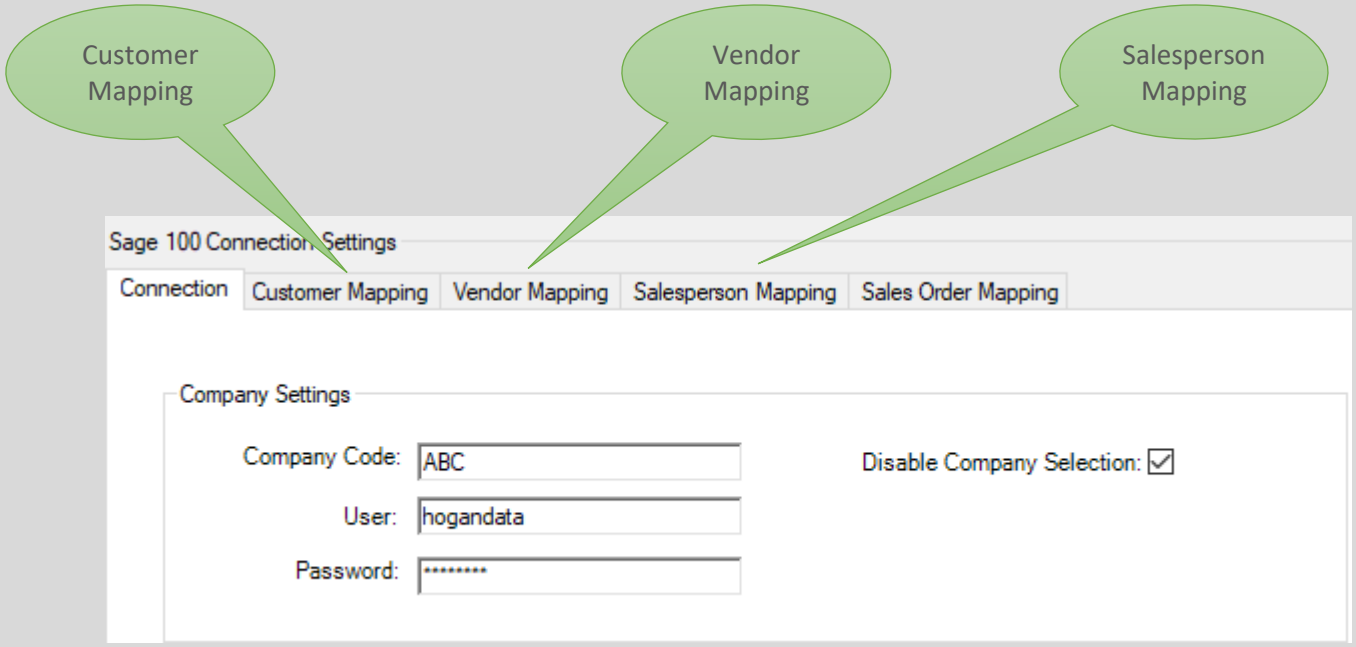
Allows or disallows Act user from creating entity from Act



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



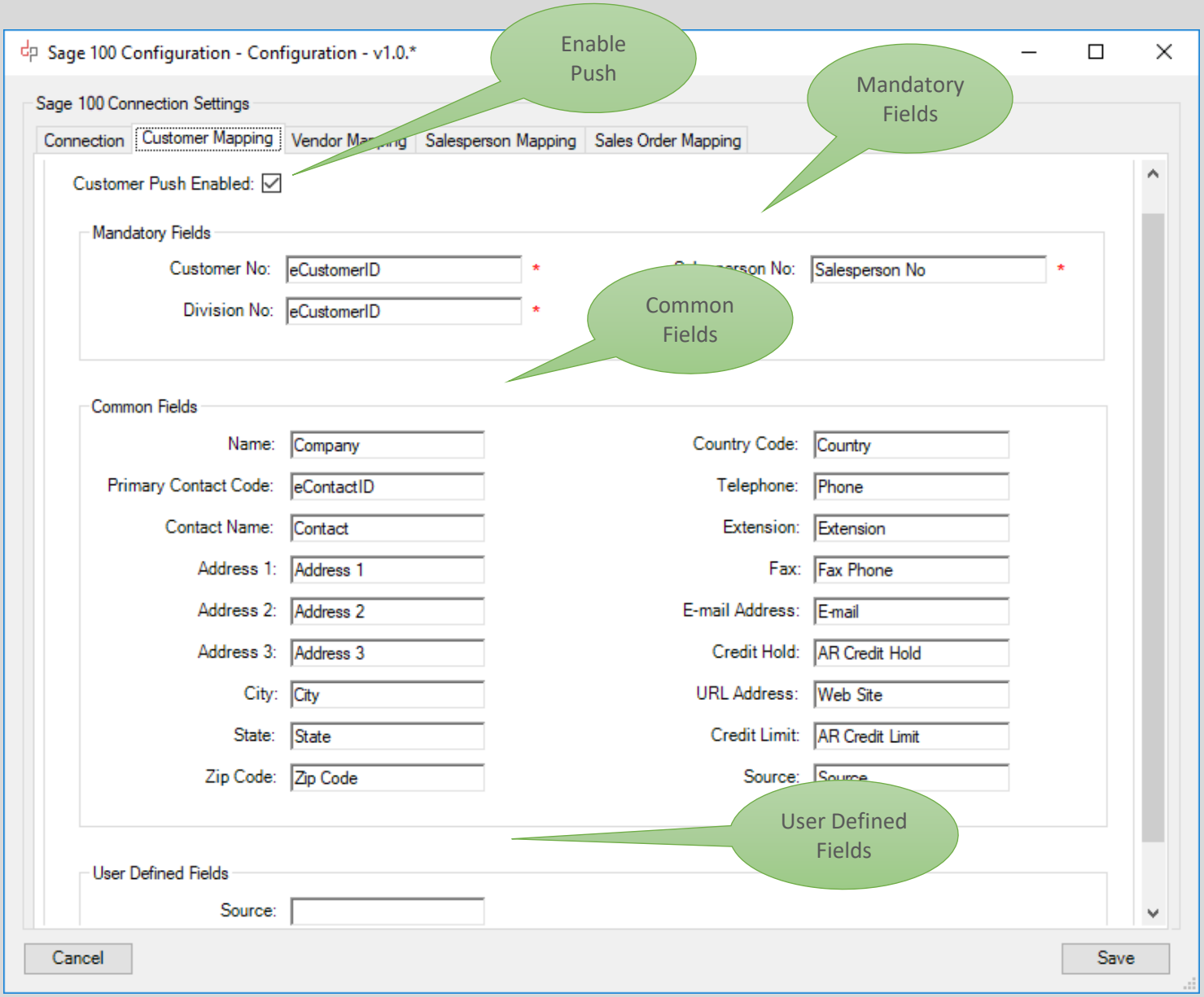
Configure Sage 100 Push

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



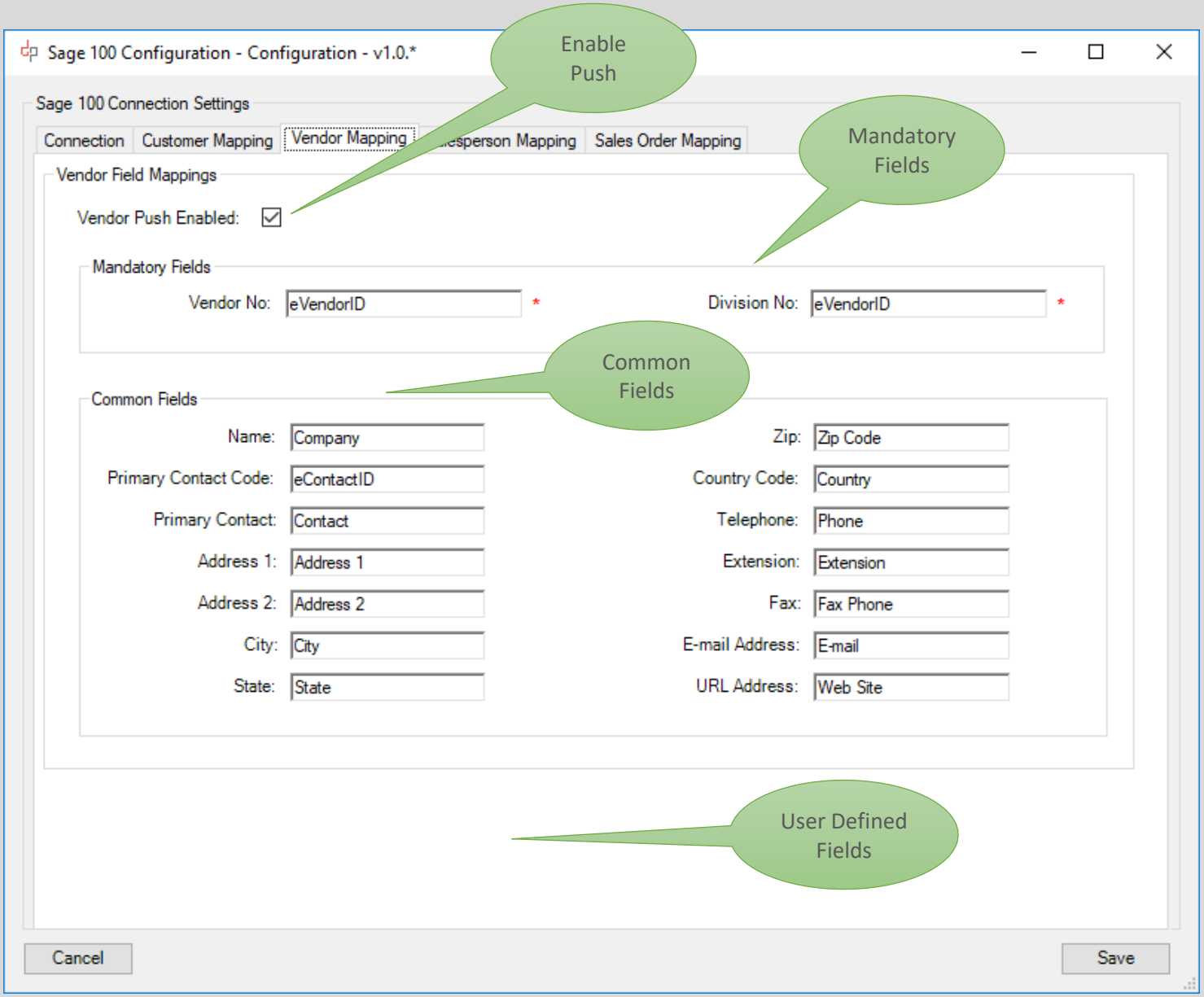
Configure Sage 100 Push

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



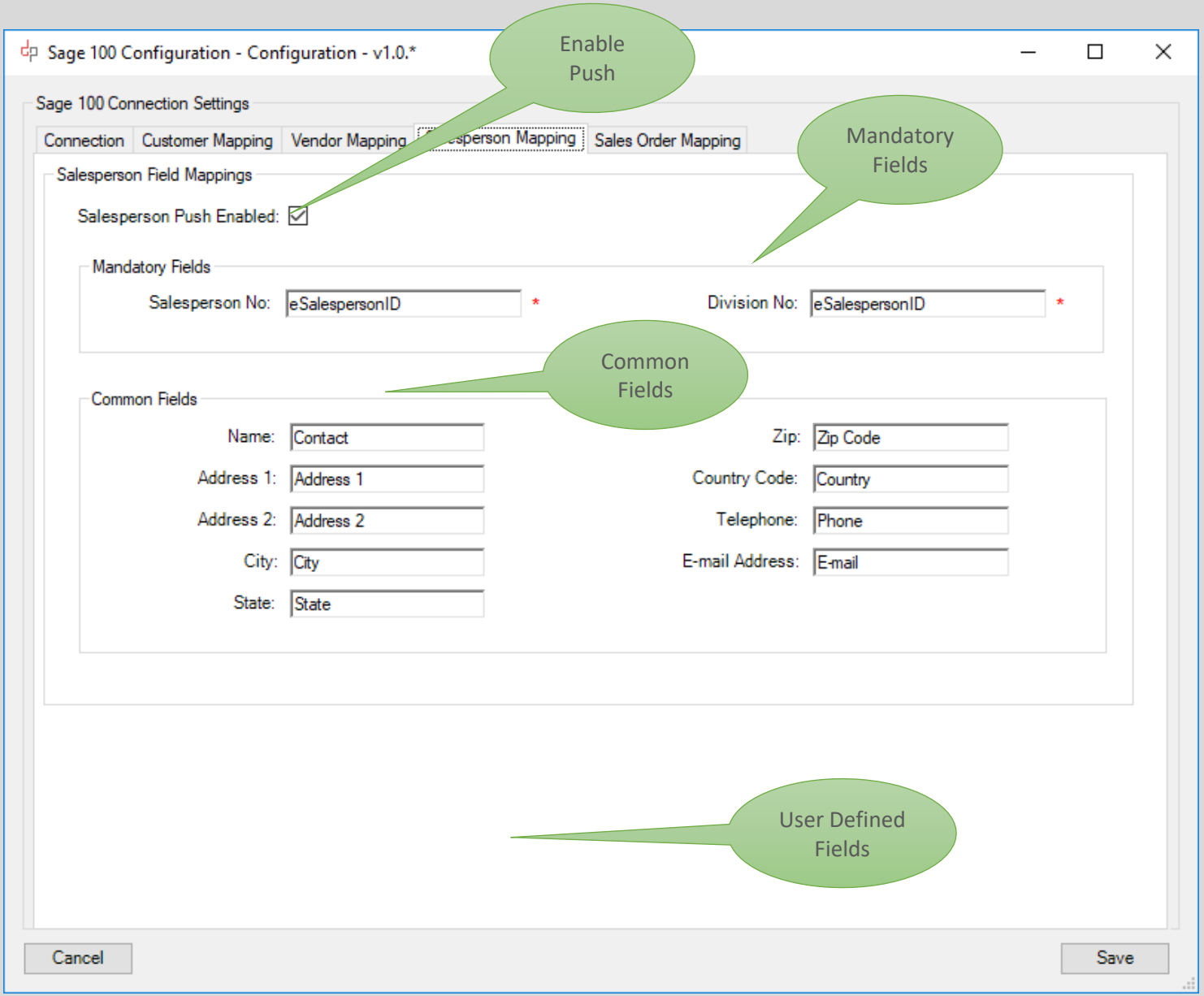
Configure Sage 100 Push

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

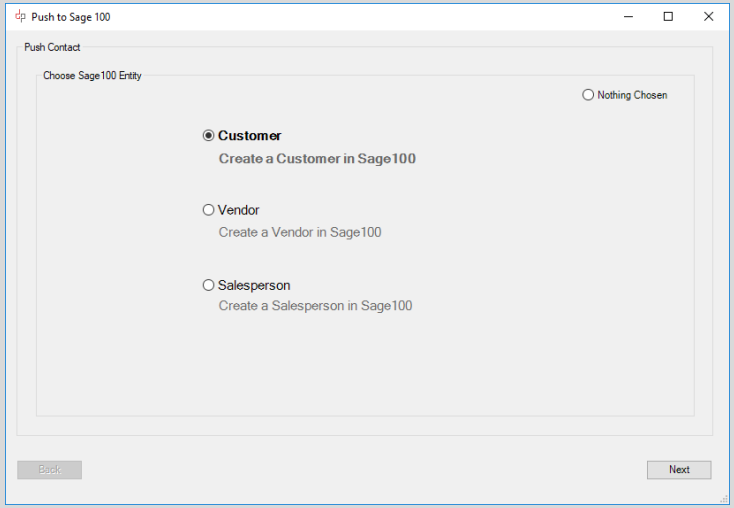


Create/Edit Customer

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

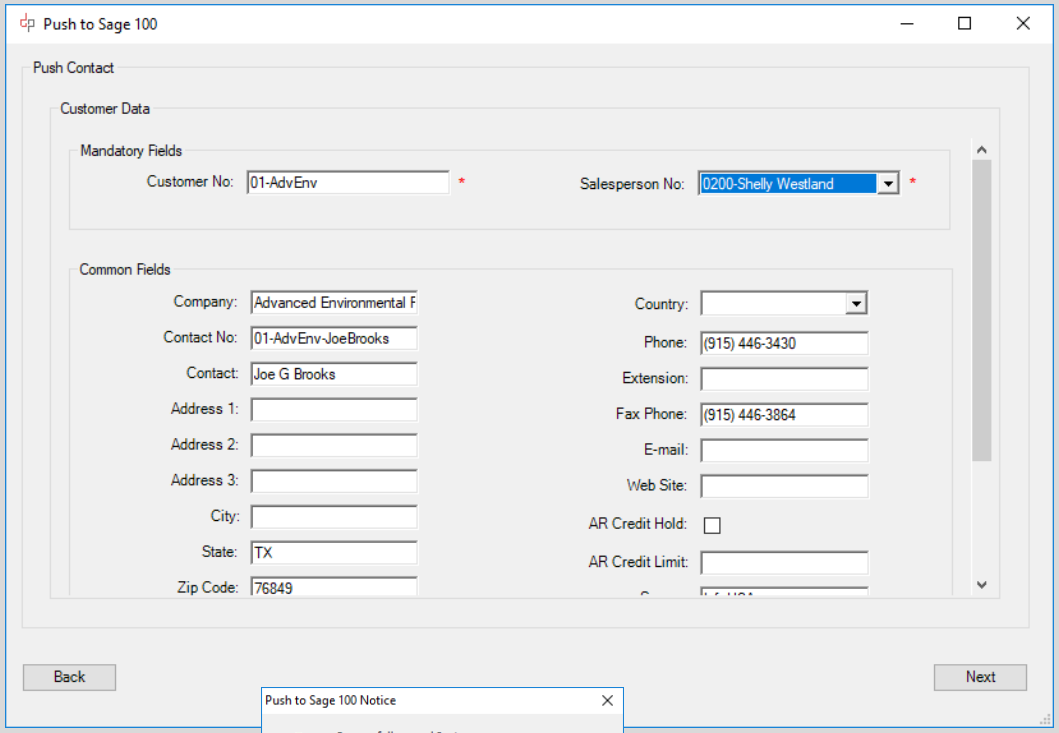
Push Act Contact as Customer to Sage 100



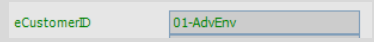
- Choose Sage 100 Entity
- Vendor
- Create a Vendor in Sage 100

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

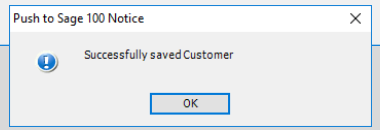
Review Push Information



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



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



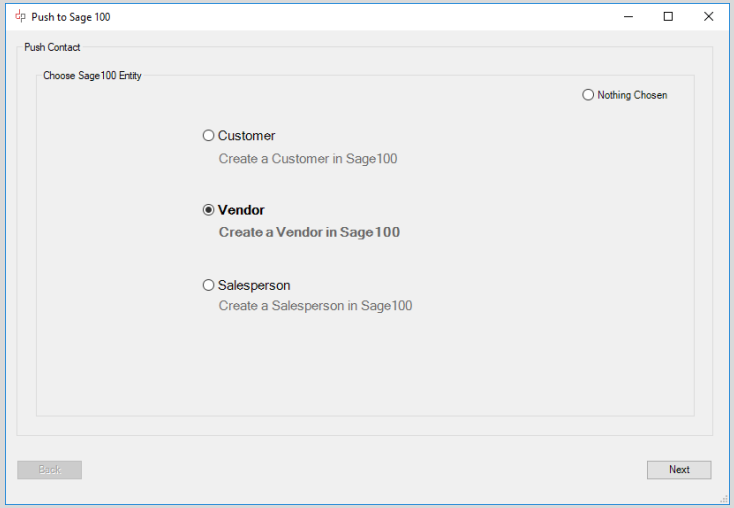
Customer successfully push to Sage 100

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

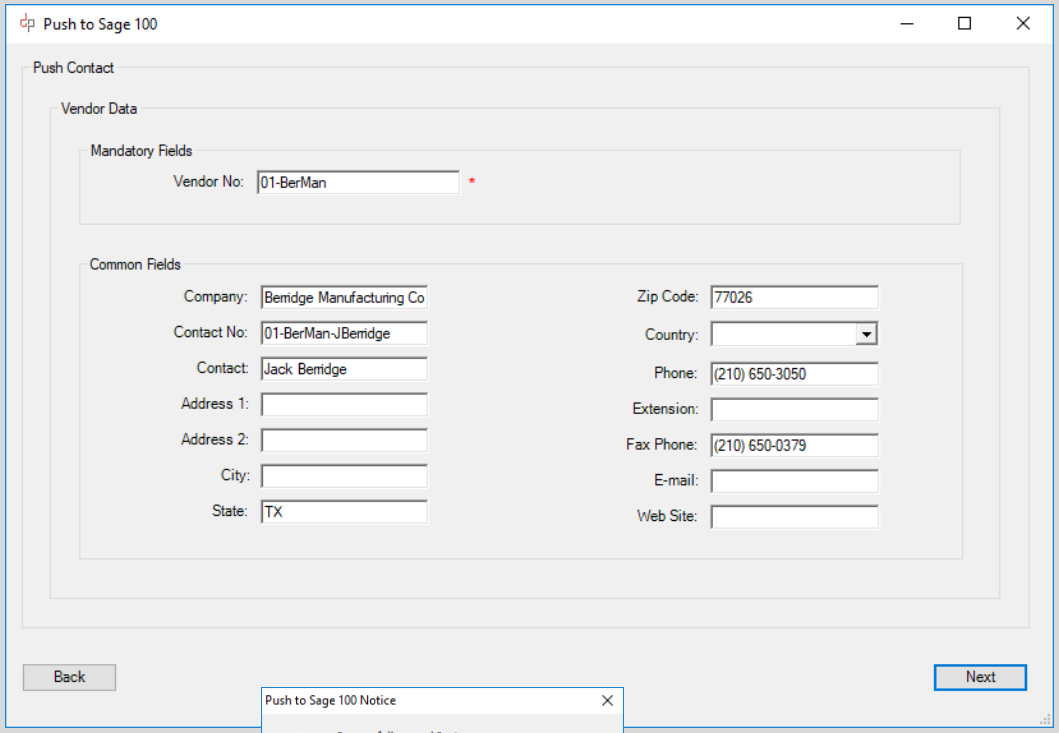
Push Act Contact as Vendor to Sage 100



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

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

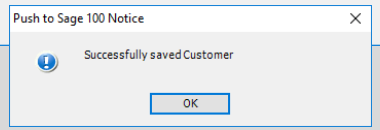
Review Push Information



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.



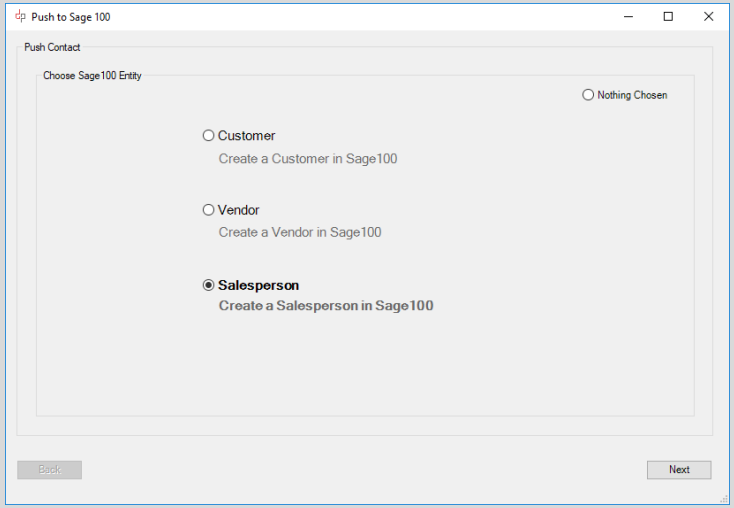
Vendor successfully push to Sage 100

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

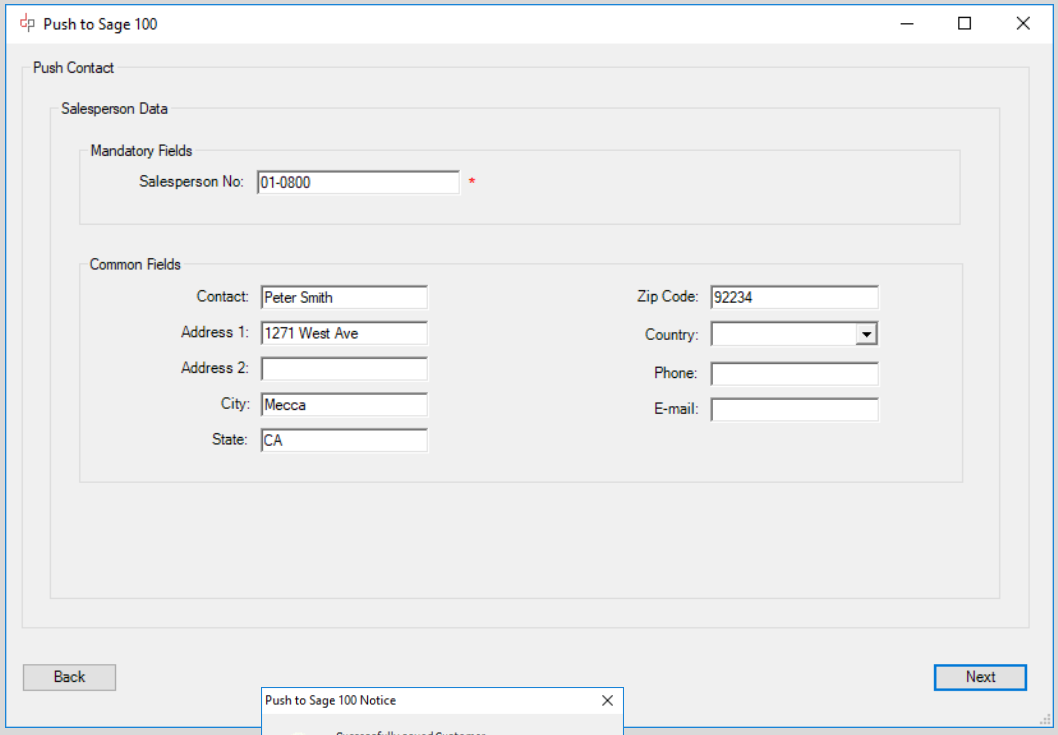
Push Act Contact as Salesperson to Sage 100



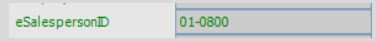
- Choose Sage 100 Entity
- Salesperson
- Create a Salesperson in Sage 100

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

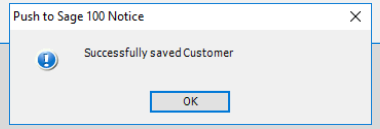
Review Push Information



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



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.

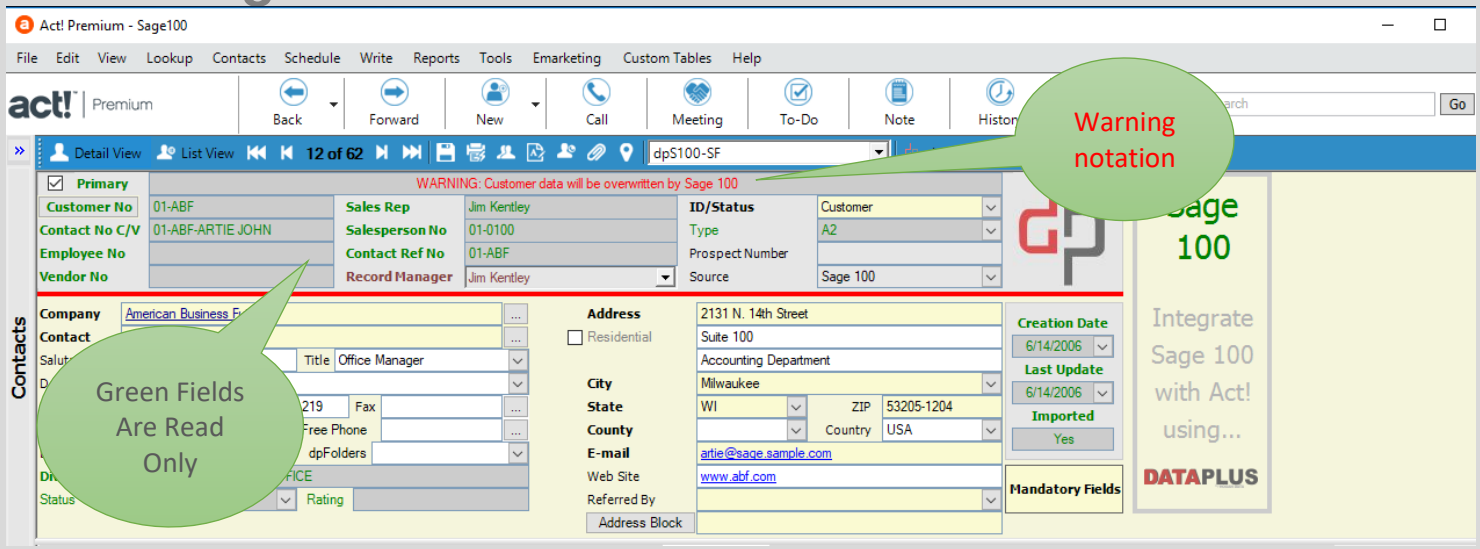
Custom Protected Fields

- 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



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!

Sage 100 Financial HIstory In Act Field

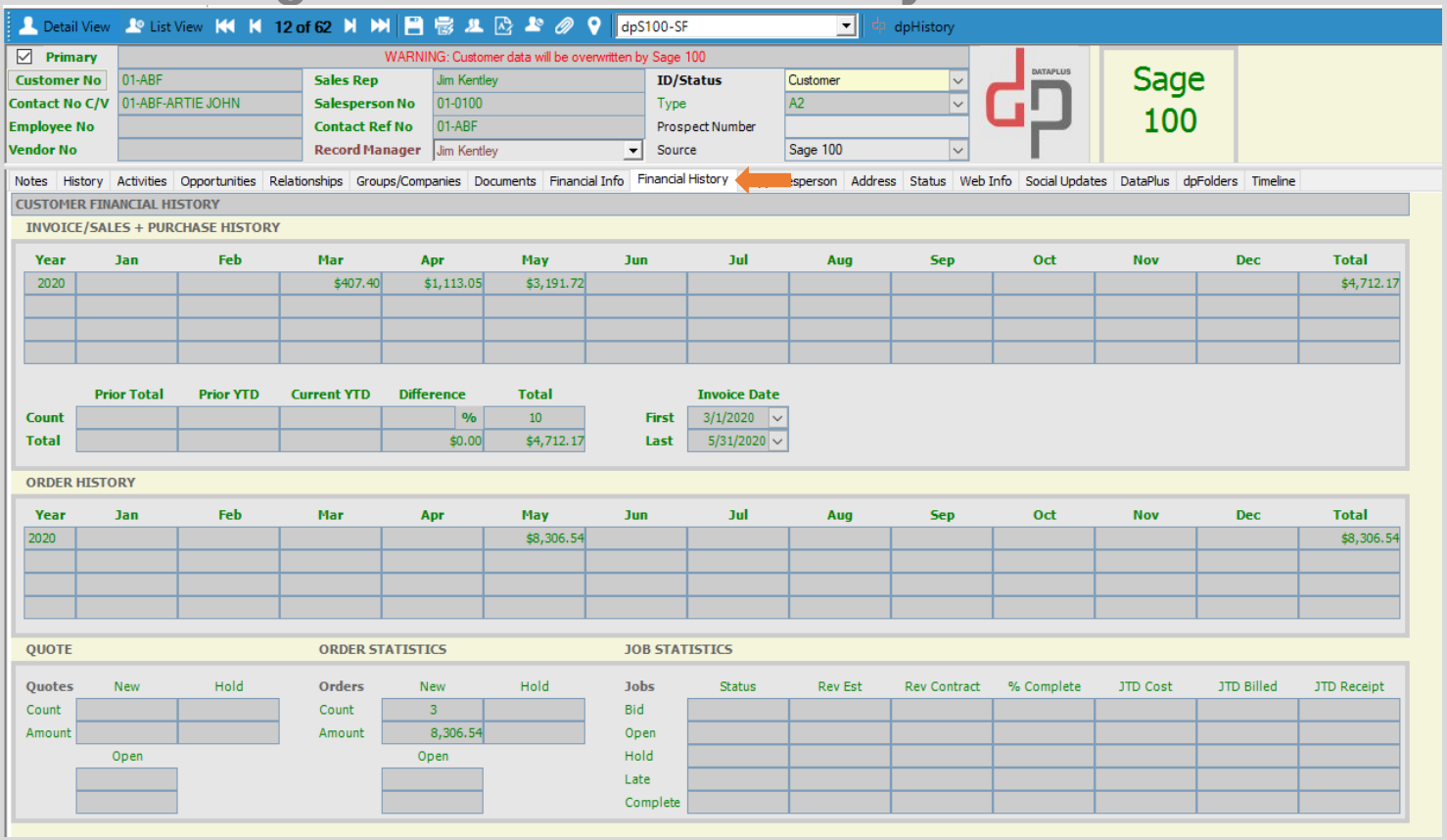
Contact Financial History

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



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.

Sage 100 Information In Act Field

Contact C / V Info

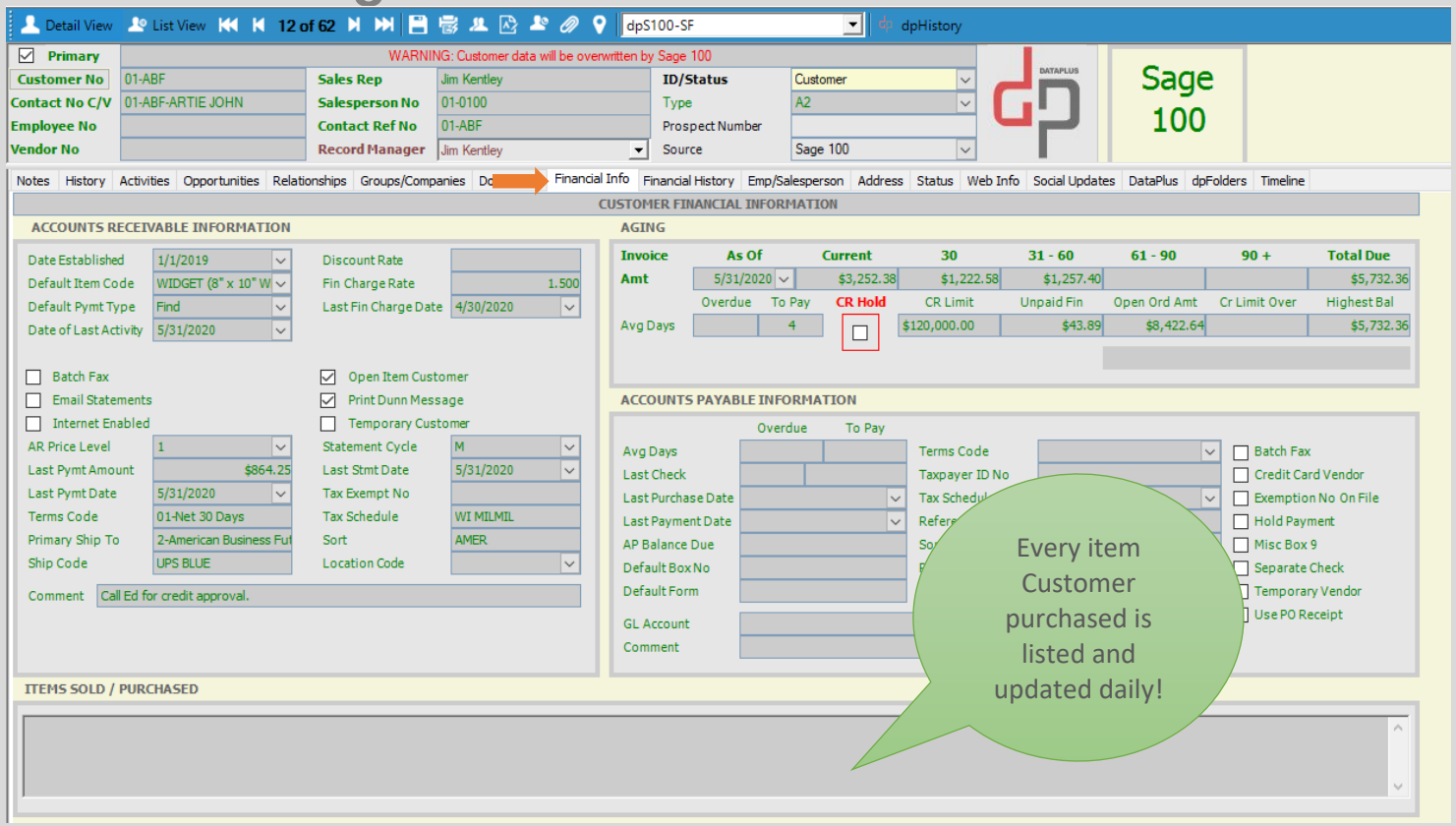
Customer/Vendor Information

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



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.

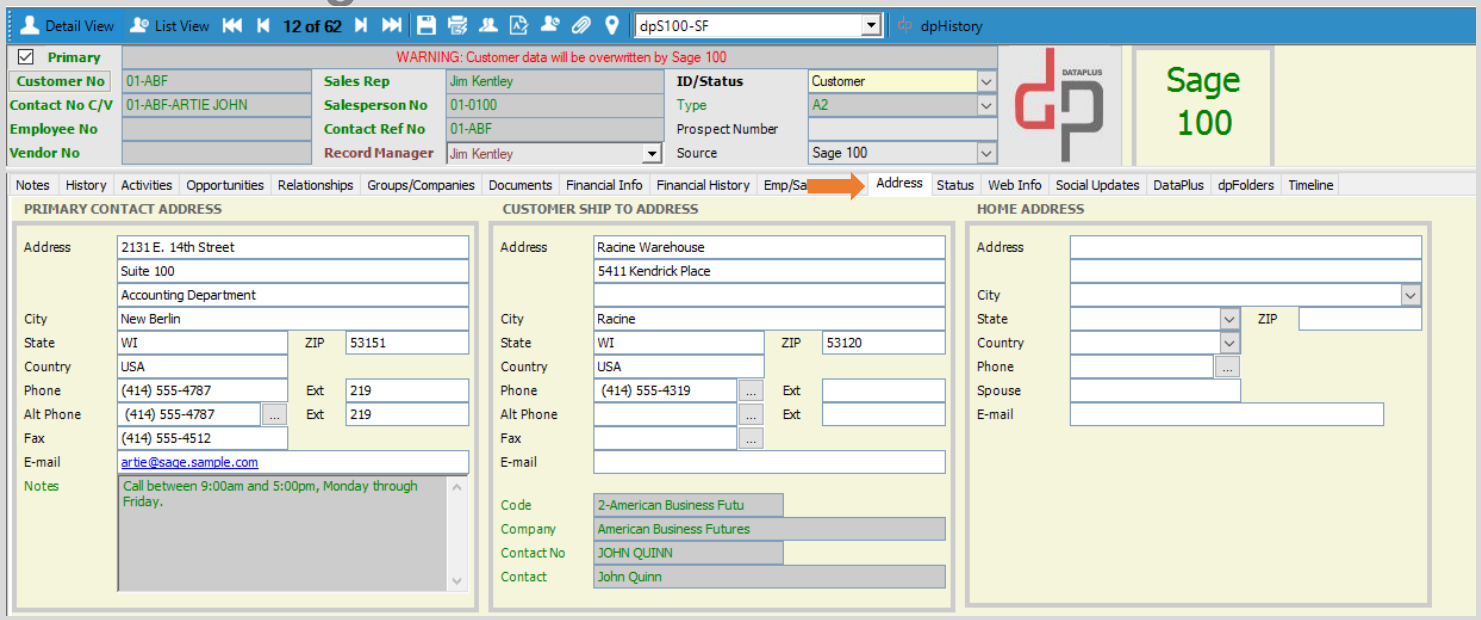
Contact Addresses

Billing Address

Shipping Address

Employee Address

Sage 100 Additional Address Fields



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

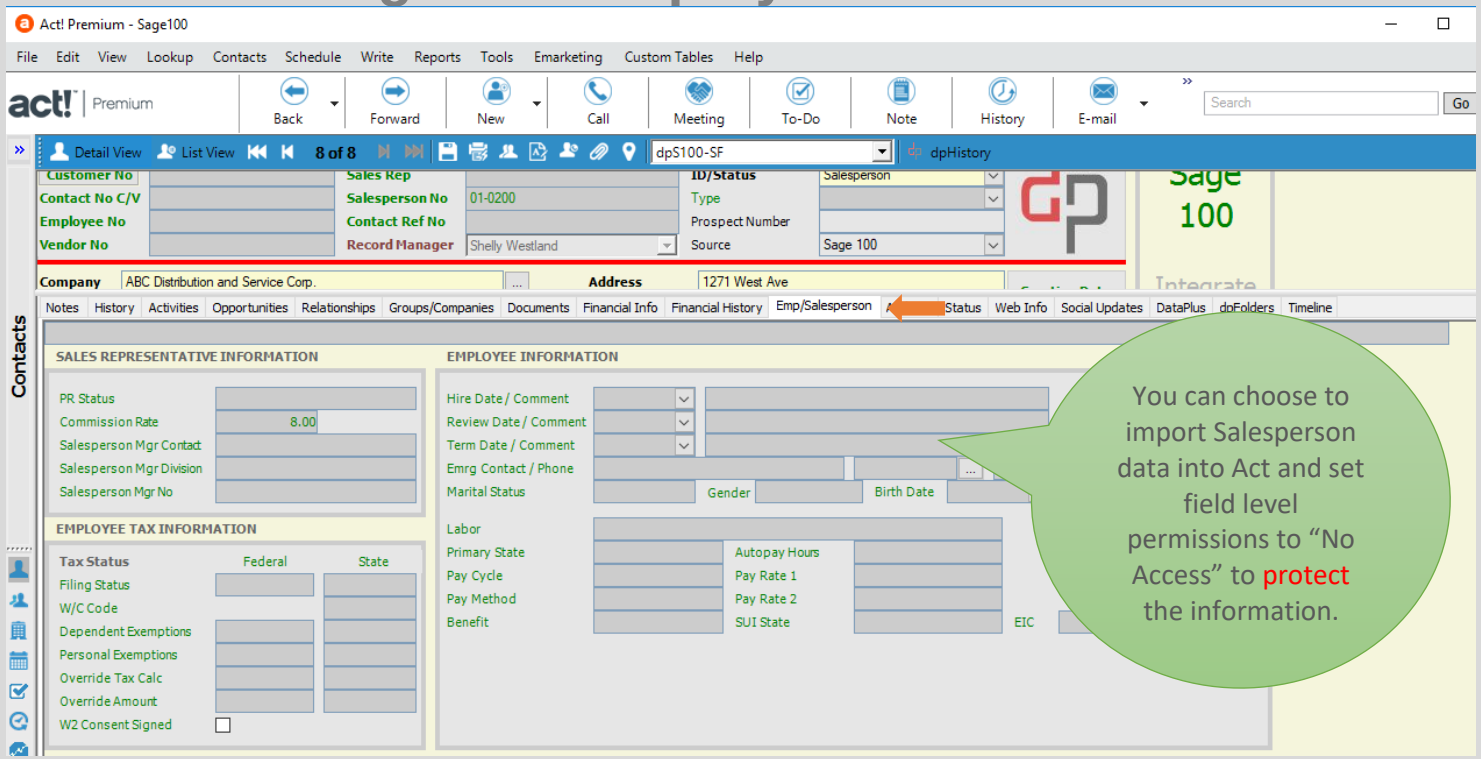
Contact Employee

Employee Information

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

Employee Notes

Sage 100 Employee Information



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.

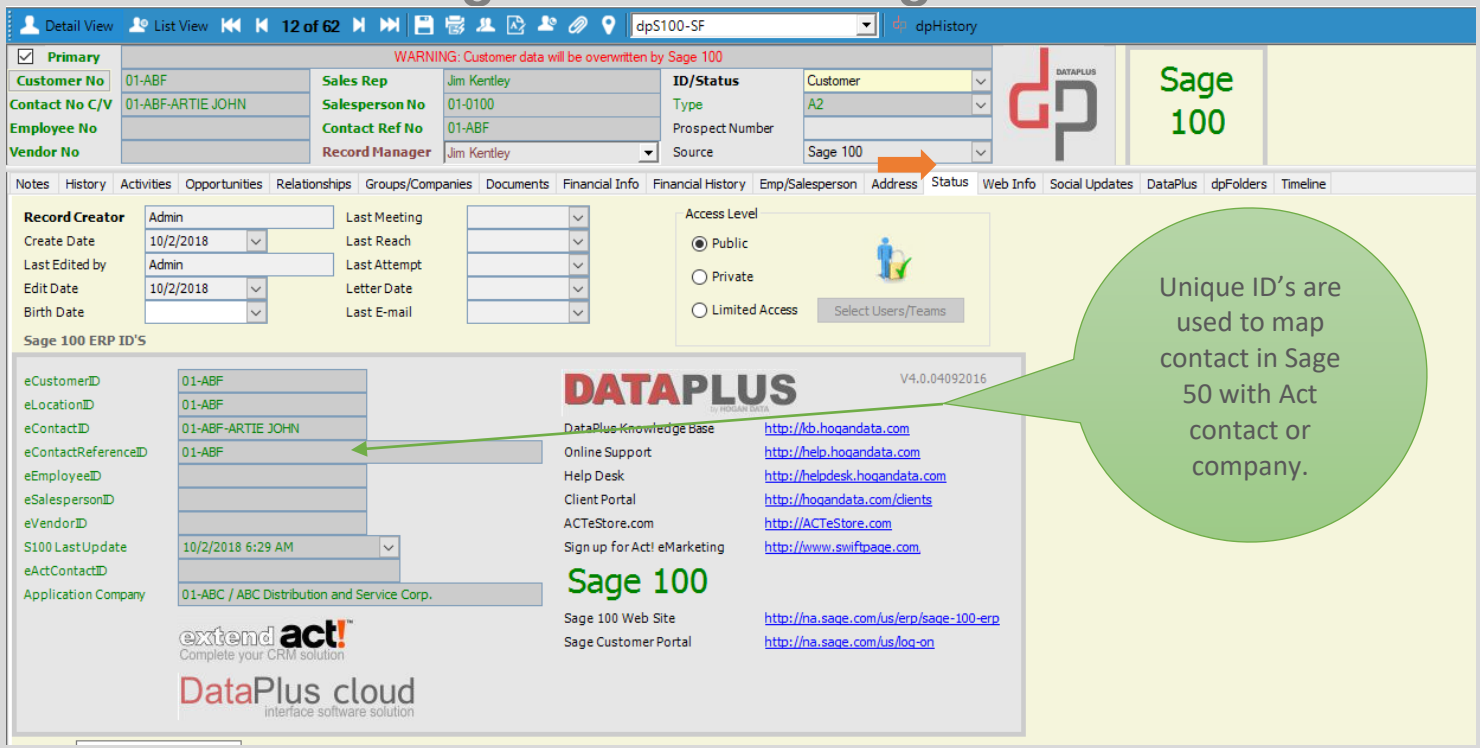
Contact Status

Sage 100 ID's

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

DataPlus Help Links

Sage 100 / Act Unigue IDs



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

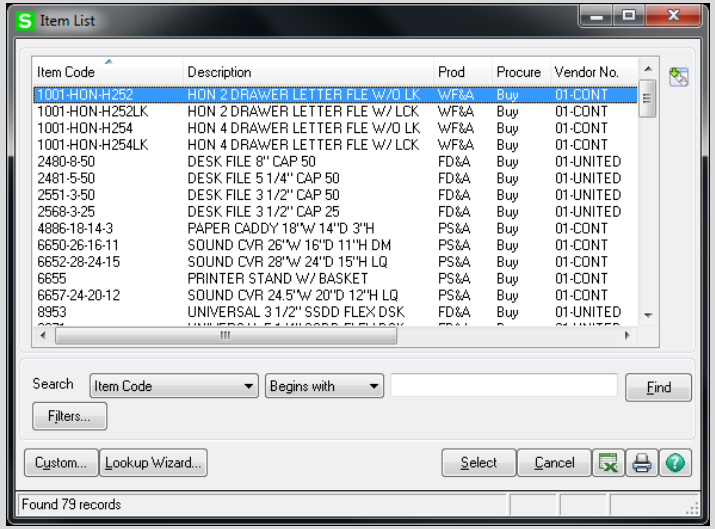
Default setting “false”

- Discount
- Payment

Act Product List

- Name
- Item Number
- Cost
- Price

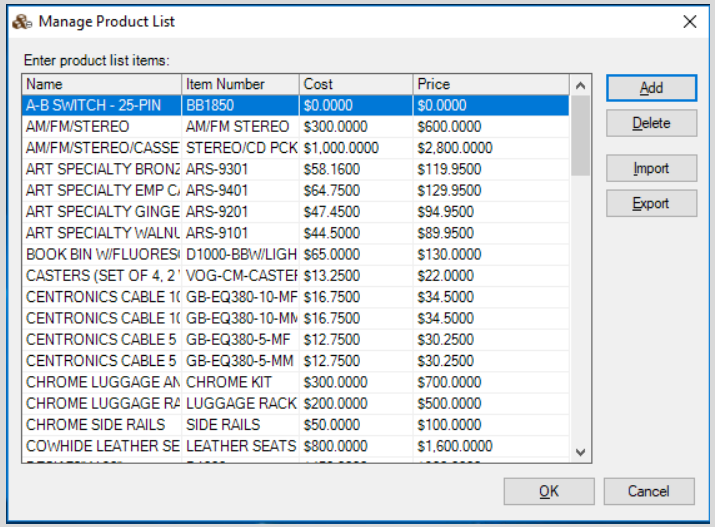
Sage 100 Item List Imported to Act Product List

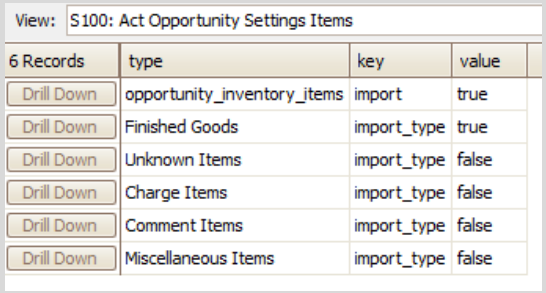


Sage 100 Item List

Act Opportunity Product List

Import Settings for Sage 100 Item Type





Act Opportunity Product list mirros Sage 100 Item List, giving you the most current items from Sage 100 and enables you to import by Item Type.

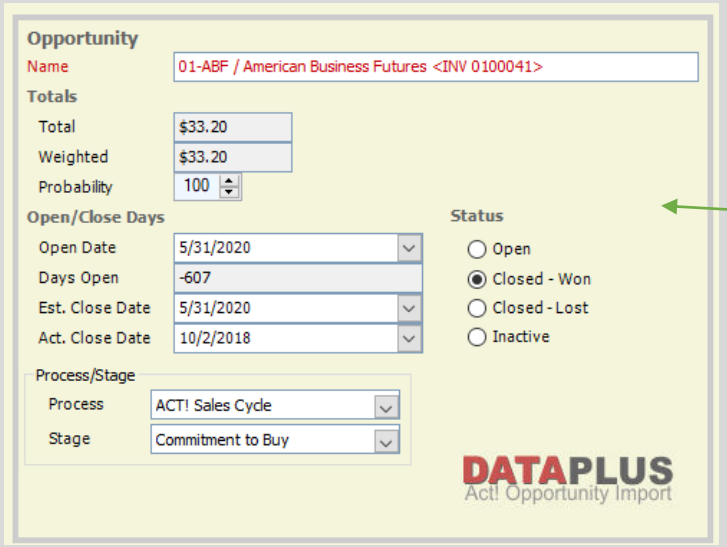
Data is updated on a scheduled basis using MS Task Scheduler.

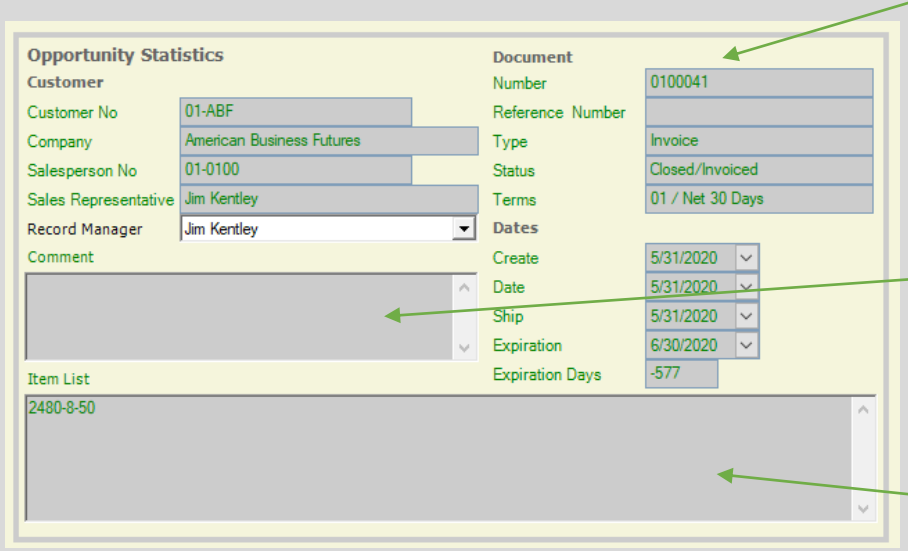
Act Opportunities

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





Act Opportunity Statistics

Sage 100 Transaction Statistics

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

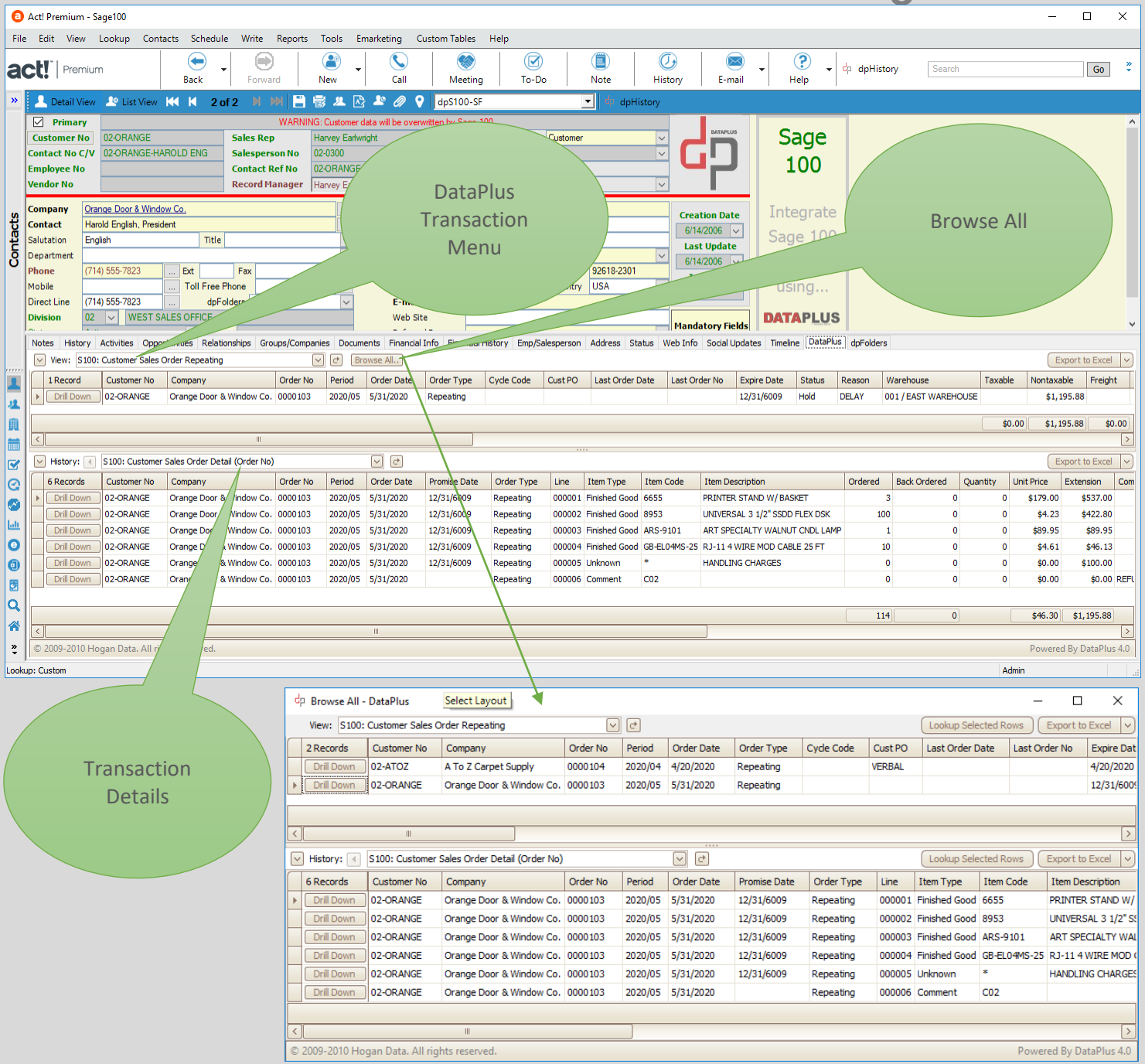
Transaction Menu

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

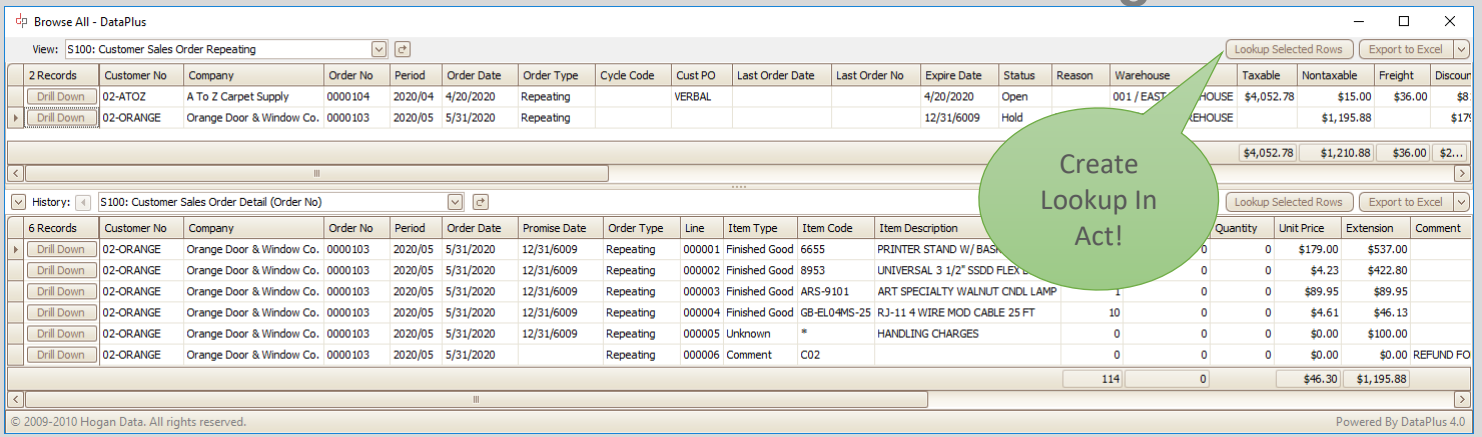


Sage 100 Transactions Menu

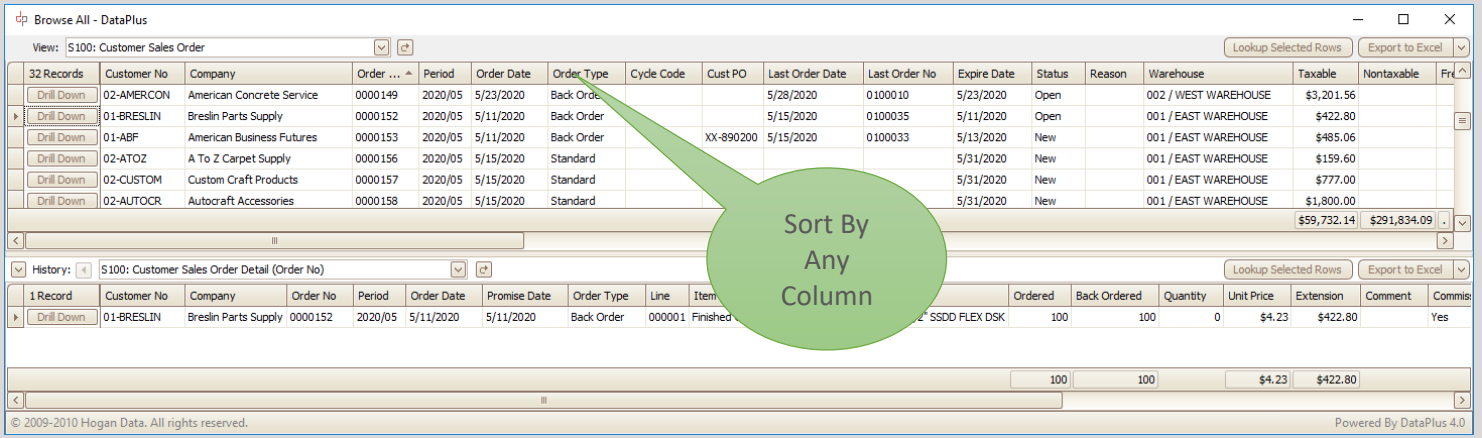
Browse All

DataPlus Browse All Menu for Sage 100

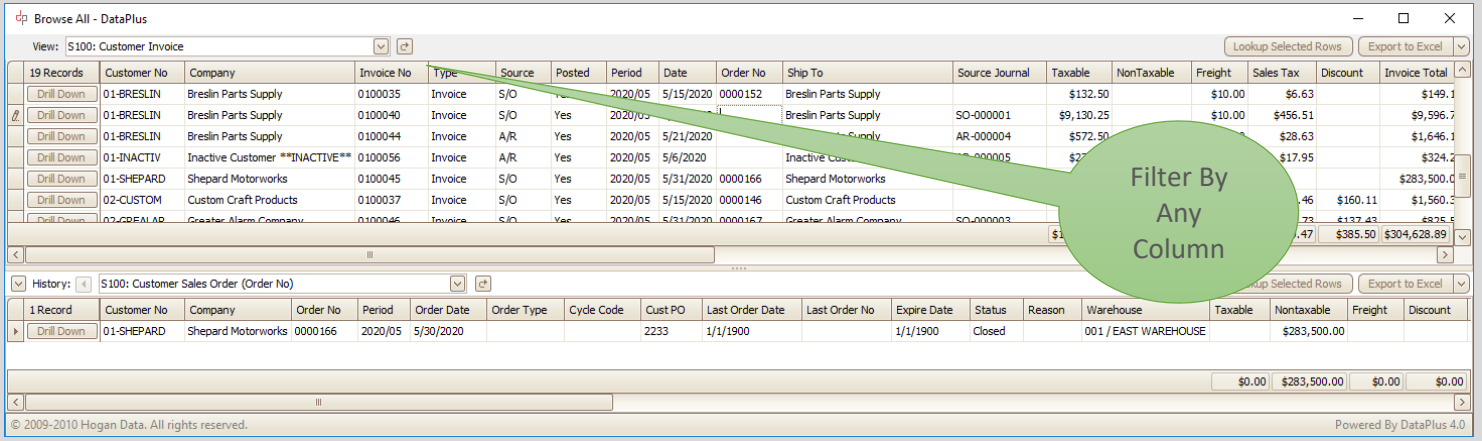
Customer Sales Order Repeating – Drill down to details



Customer Sales Orders – Drill down to details



Customer Invoices – Drill down to Sales Orders



Sage 100 Transactions Menu

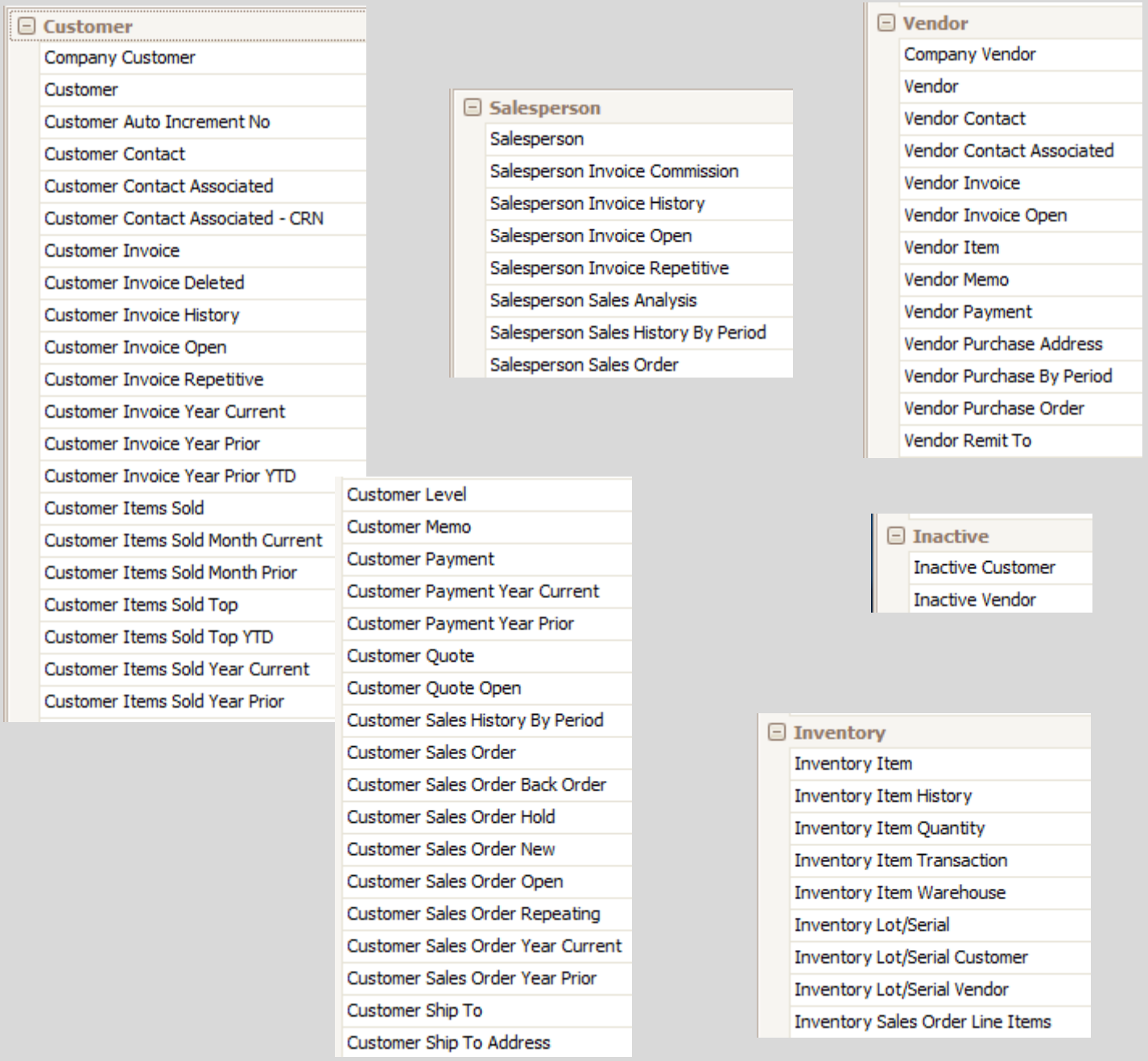
Transaction Menu

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

Transaction Menu

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

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

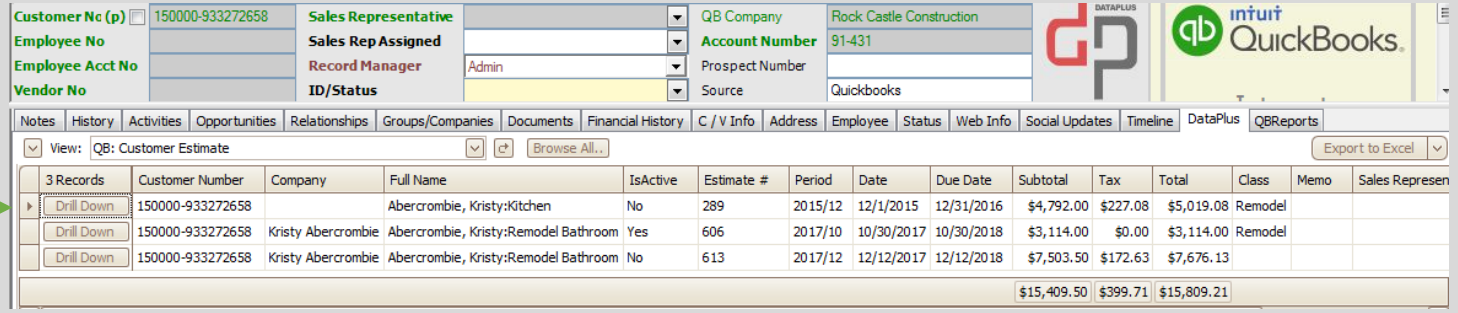
Each menu item allows drill down to more details or to related transactions.

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

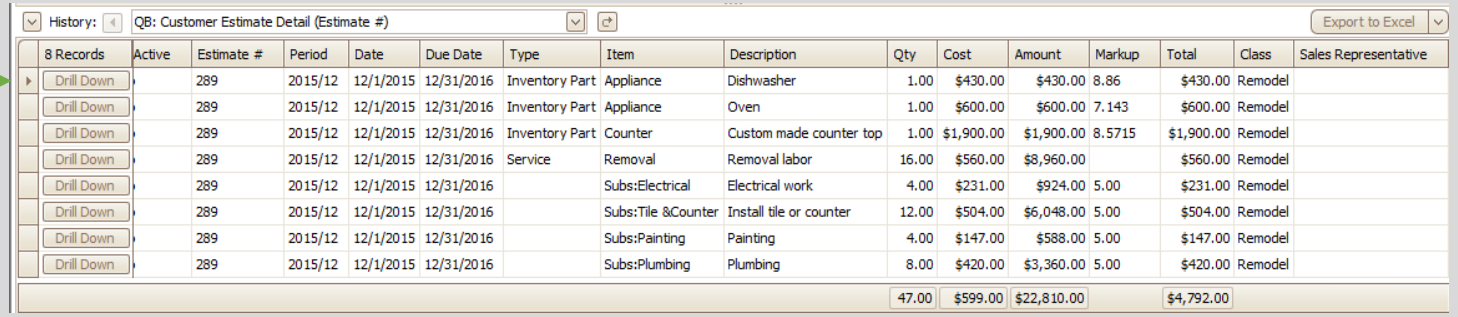
Notes | History | Activities | Opportunities | Relationships | Groups/Companies | Documents | Financial History | C / V Info | Address | Employee | Status | Web Info | Social Updates | Timeline | DataPlus | QBReports

View: QB: Customer Estimate | 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

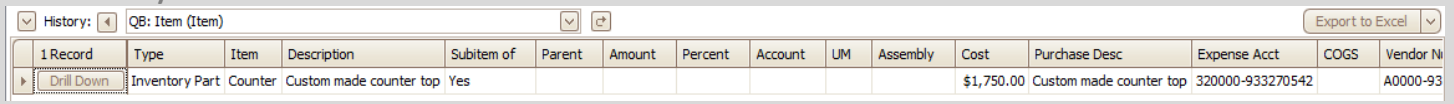


History: QB: Customer Estimate Detail (Estimate #) | Export to Excel

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

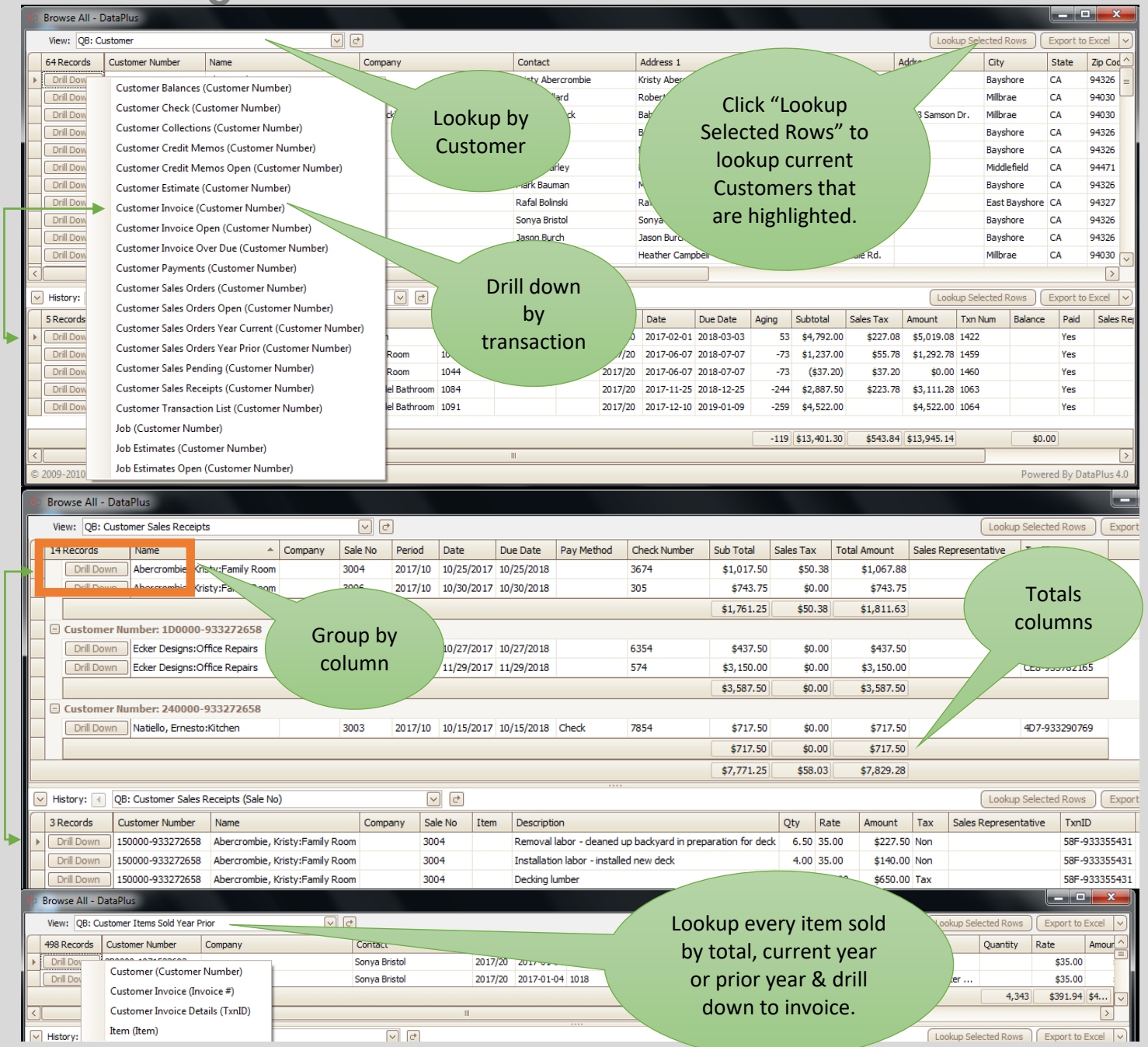
Sage 100 Transactions Browse All Menu

Browse All Menu

DataPlus “Browse All” allows you 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



Sage 100 Browse All Transactions Menu

Sage 100 Transactions Browse All

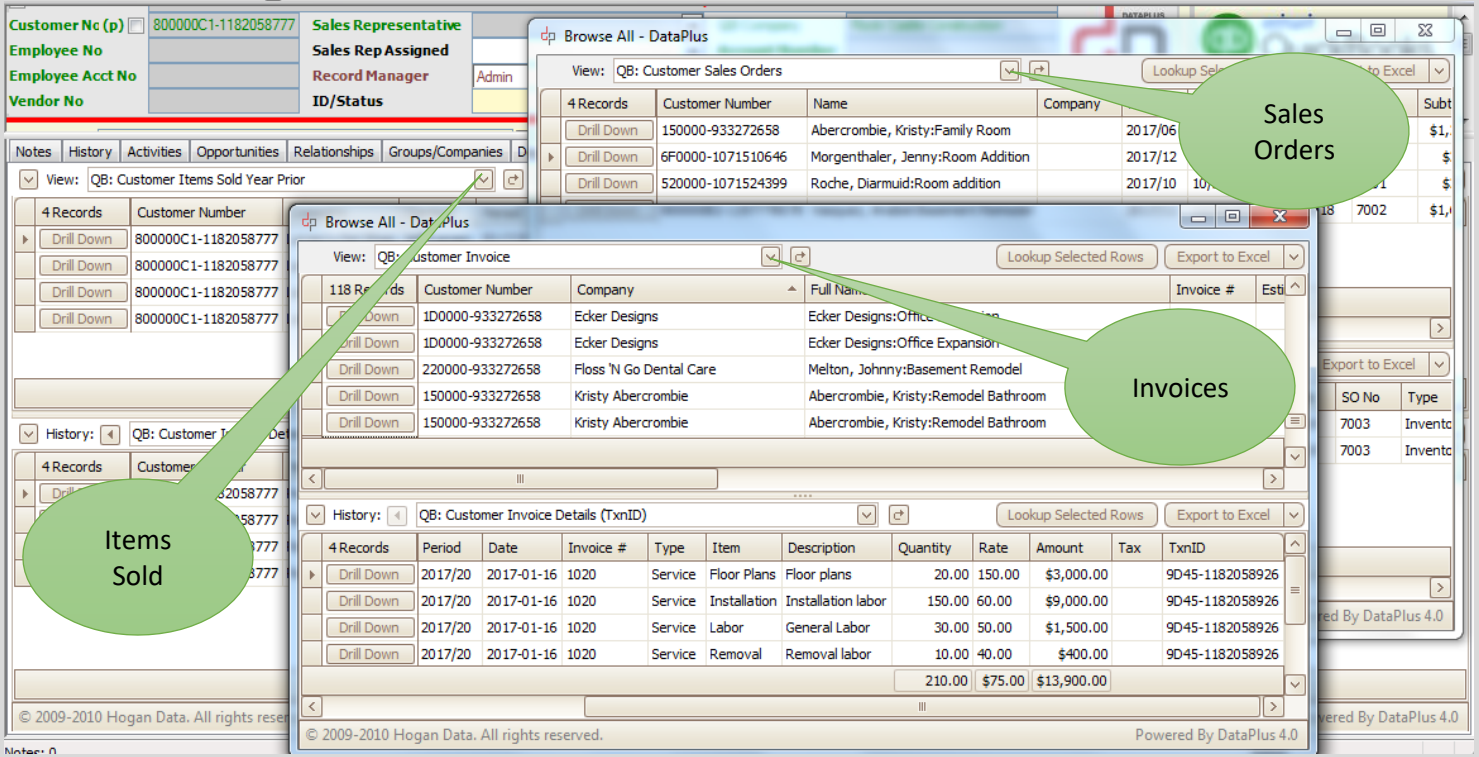
Browse All Menu

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.



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.

Sage 100 Create Sales Order

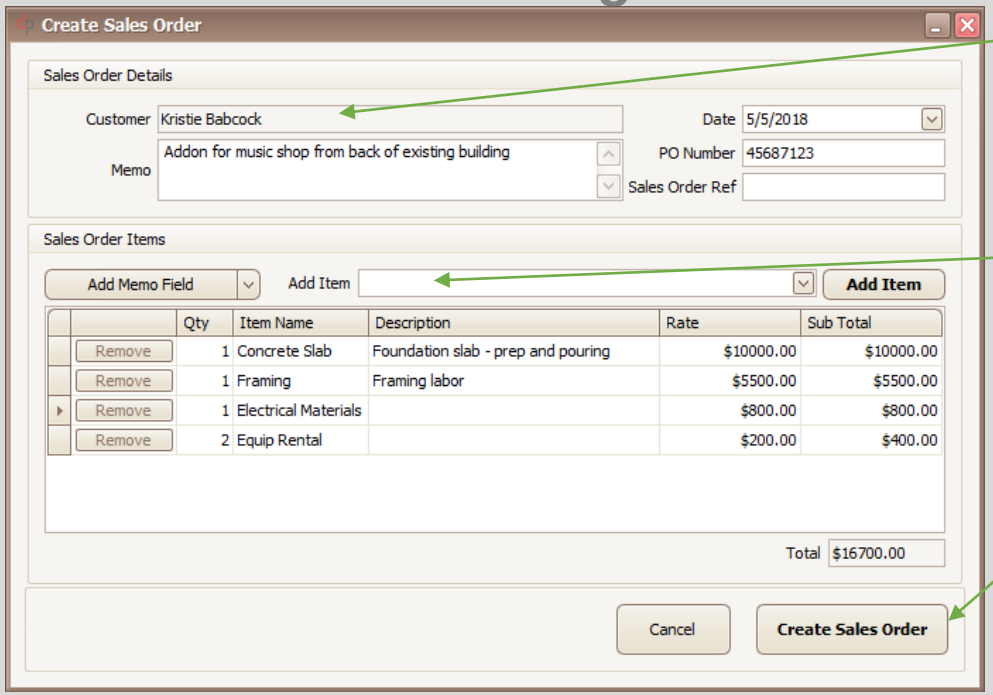
When configuring DataPlus to create Sage 100 transactions, creating Sales Order is enabled.

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.

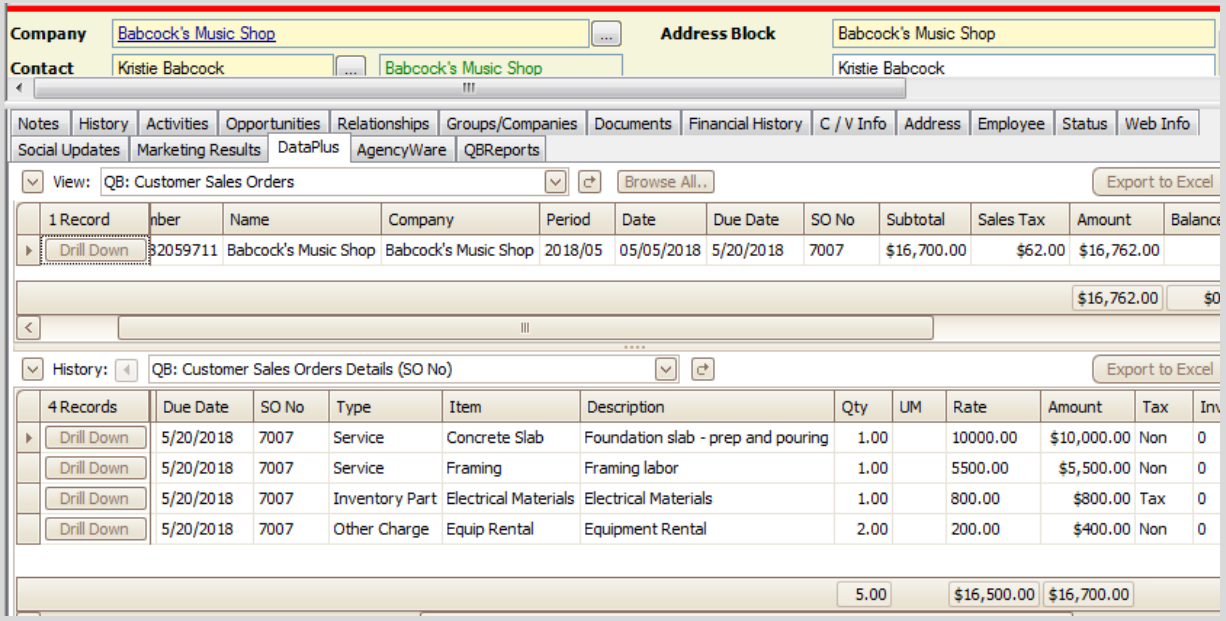
Create Sage 100 Sales Order



Current Act Contact

Item lookup directly from QuickBooks

Create Sales Order



Sales Order

Sales Order Details

Sage 100 Create Invoice from Act Opportunity

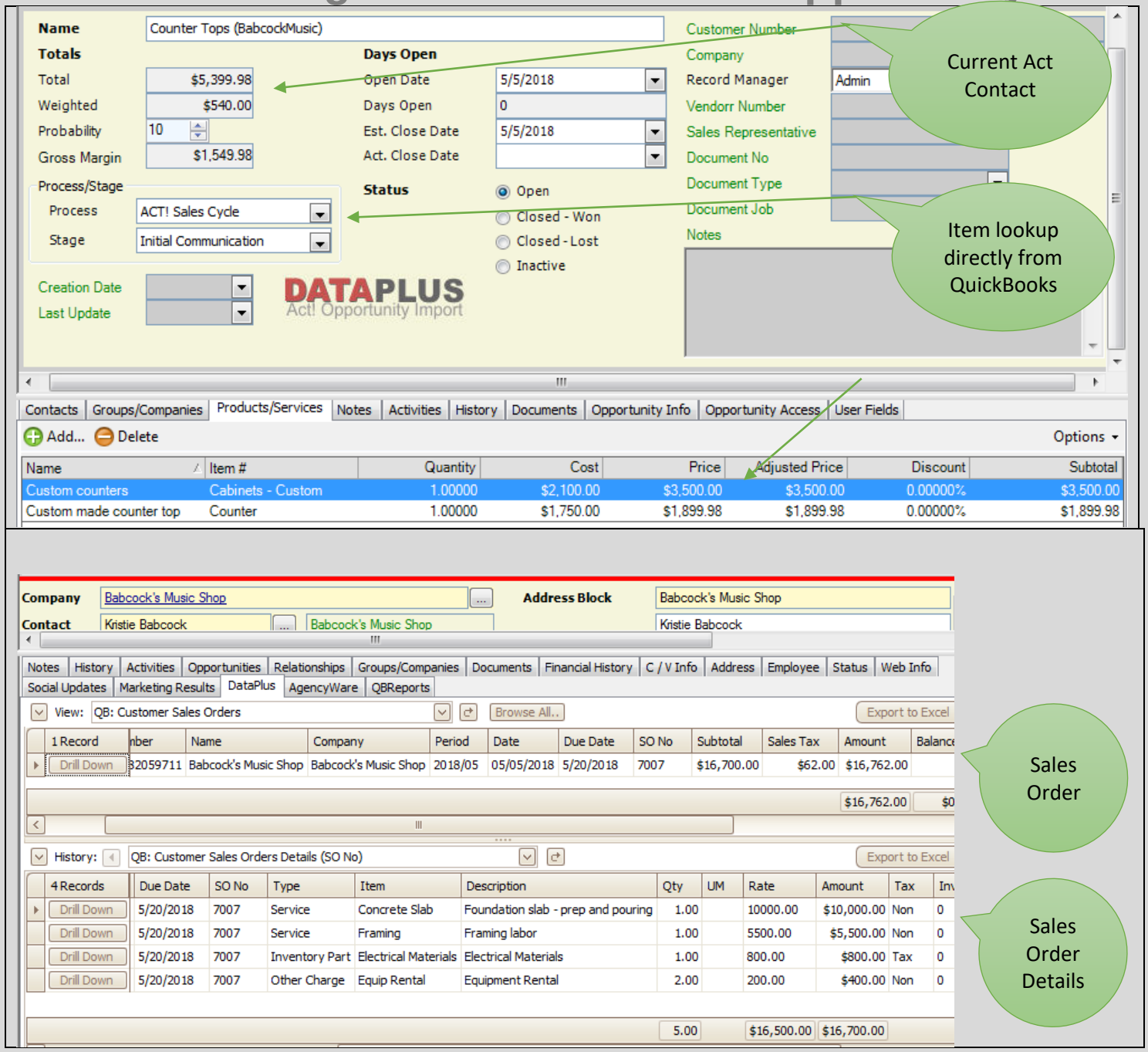
When configuring DataPlus to create Sage 100 transactions, creating Invoice from Act Opportunity(s) is enabled.

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



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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