



DataPlus Addon Software



Integrate Sage BW With Act Premium!

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

Act! Premium - SageBwLink

File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Sage BusinessWorks Help

act!™

Back Forward New Call Meeting To-Do Note History E-mail Help Topics

Search Go

Contacts << Detail View List View 10 of 21 dpSBW

Look up

Contact Field: Contact

Contains: Go

More Options...

Related Tasks

- View All Contacts
- Write Letter
- Print Current Screen

Contacts

- Groups
- Companies
- Calendar
- Task List
- History List
- Opportunities
- Emarketing
- Marketplace
- Reports
- Dashboard
- Search
- Welcome

Active

WARNING: Customer data will be overwritten by Sage Business Works

Customer No: IBS Sales Representative: Mildred Anthony Sage Company: BikeWorks International

Sales Rep No: Record Manager: Admin Status: Customer - Sage BWA

Employee No: Prospect Number: ID/Status: Sage Business Works

Vendor No: Vendor Account No: Source:

Company: Inter. Bicycle Sales Address: 1238 Federal Bldg. V4.0.04272015

Contact: Robert Yamis Avenue of the Americas

Salutation: Robert Title: City: New York

Department: State: NY ZIP: 10020

Phone: (212) 567-9900 Ext: Fax: (212) 567-9910 Country:

Mobile: Toll Free Phone: E-mail:

Notes History Activities Opportunities Relationships Groups/Companies Documents Financial History C / V Info Address Emp Status Web Info Social Updates Sage BusinessWorks DataPlus

CUSTOMER FINANCIAL INFORMATION

INVOICE/SALES + PURCHASE HISTORY

| Year | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Total |
|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| | | | | | | | | | | | | | |

Yearly Comparison

| Year | Prior Total | Prior YTD | Current YTD | Difference | Total |
|-------|-------------|-----------|-------------|------------|------------|
| Count | | | | % | 6 |
| Total | | | | | \$5,662.06 |

AR / AP Aging

| Invoice | Current | 30 | 31 - 60 | 61 - 90 | 90 + | Outstanding | Total Due |
|---------|---------|----|---------|---------|------------|-------------|------------|
| No | | | | | 4 | 4 | 4 |
| Am | | | | | \$2,669.37 | \$2,669.37 | \$2,669.37 |
| | | | | | | FC Due | \$90.00 |

Lookup: Customer Number Admin

Act! Premium - SageBwLink

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act!™

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Contacts << Detail View List View 10 of 21 dpSBW

Active **WARNING: Customer data will be overwritten by Sage Business Works**

Customer No IBS Sales Representative Mildred Anthony Sage Company BikeWorks International

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CUSTOMER INFORMATION

| INFORMATION | | Customer Description Primary | | On Hold | |
|---|-----------------------|------------------------------|---------------------------|--|--|
| Sales Tax ID | | Current FC | \$20.78 | <input type="checkbox"/> On Hold | |
| Customer Since | 1/4/1998 | Highest Balance | \$3,996.41 | <input type="checkbox"/> CC Vendor | |
| Comment 1 | | YTD Sales | \$6,010.11 | YTD Purchases | |
| Comment 2 | | YTD Adjustments | (\$0.60) | YTD Payments | |
| Terms | 3.00%- 5 / Net 30 | Finance Charges | \$20.78 | YTD Discounts | |
| Sales Acct No | Schwinn bikes | MTD Sales | \$2,715.67 | YTD 1099 Payments | |
| Note | | MTD Adjustments | (\$0.60) | MTD Purchases | |
| Category | None | Last Stmt Date | | MTD Payments | |
| Sales Tax 1 | EXMT/Exempt Sales Tax | Last Order Date | 7/15/2010 | MTD Discounts | |
| Sales Tax 2 | | Last Payment Date | 6/30/2010 | Last Payment Type | |
| Sales Tax 3 | | Last Payment Amt | \$1,327.04 | Last Check Date | |
| Item Price Level | 0 | Last Check No | 1 | Last Check Amt | |
| IC Part price level | 9 | Total Sales | \$5,662.06 | Last EFT Confirm No | |
| Discount Rate | 0.000 | Current Open Balance | \$2,669.37 | Fed ID No | |
| Credit Limit | \$10,000.00 | Balance | | 1099 | |
| <input type="checkbox"/> Credit Hold | | On Order Amt | \$1,208.19 | Distribution | |
| <input checked="" type="checkbox"/> Subject to FC | | Open Credit | | Accounts Payables | |
| <input checked="" type="checkbox"/> Dunning Note | | Days To Pay | 25 | AP Discounts | |
| <input checked="" type="checkbox"/> Print Statement | | | | Pmt Terms | |
| <input type="checkbox"/> Balance Forward Stmt | | | | <input type="checkbox"/> One check per invoice | |
| <input type="checkbox"/> Use Individual Rate | | | | | |
| Monthly FC Rate | 0.000 | Custom1 | Bicycle World Magazine Ad | | |
| Min FC Amount | \$0.00 | Custom2 | | | |
| FC Grace Period | 0 | Custom3 | | | |
| | | Custom4 | | | |
| | | Custom5 | | | |

Lookup: Customer Number

Admin



Search Go

Contacts

Detail View List View 10 of 21 dpSBW

WARNING: Customer data will be overwritten by Sage Business Works

| | | | | | |
|---------------------|-----|-----------------------------|-----------------|---------------------|-------------------------|
| Customer No | IBS | Sales Representative | Mildred Anthony | Sage Company | BikeWorks International |
| Sales Rep No | | Record Manager | Admin | Status | |
| Employee No | | Prospect Number | | ID/Status | Customer - Sage BWA |
| Vendor No | | Vendor Account No | | Source | Sage Business Works |



Sage
Business
Works

Integrate
with Act!
using

Lookup

Contact Field:

Contains: Go

More Options...

Related Tasks

- View All Contacts
- Write Letter
- Print Current Screen

| | | | | | |
|-------------------|---------------------|----------------|------------------------|----------------|----------------|
| Company | Inter Bicycle Sales | Address | 1238 Federal Bldg. | V4.0.04272015 | |
| Contact | Robert Yamis | | Avenue of the Americas | | |
| Salutation | Robert | Title | | City | New York |
| Department | | State | NY | ZIP | 10020 |
| Phone | (212) 567-9900 | Ext | | Fax | (212) 567-9910 |
| | | County | | Country | |

Notes History Activities Opportunities Relationships Groups/Companies Documents Financial History C / V Info Address Emp Status Web Info Social Updates Sage BusinessWorks DataPlus

| | | | | | |
|--------------------------------------|--------------------------|----------------------------|---------------|--|-------------------------------------|
| Maintain Employees | | Payment Information | | Status | |
| <input type="checkbox"/> Emp On Hold | | Pay Period | | Federal | State |
| Hire Date | | Pay Type | | <input type="checkbox"/> FWT Exempt | <input type="checkbox"/> SWT Exempt |
| Last Review | | Emp Standard Rate | | <input type="checkbox"/> OASDI Exempt | <input type="checkbox"/> SDI Exempt |
| Next Review | | Pay Rate | | <input type="checkbox"/> Medicare Exempt | <input type="checkbox"/> SUI Exempt |
| Terminated / Date | <input type="checkbox"/> | Per | | <input type="checkbox"/> FUI Exempt | FUTA Rate |
| Comments | | Department | | Allowances | Allowances |
| | | Shift | | EIC Status | Extra Allowances |
| | | Task Code | | <input type="checkbox"/> Ag Employee | Exempt Amt |
| SSN Last4 | | WorkComp Code | | Extra W/H Amount | Extra W/H Amt |
| SWT State | | | | <input type="checkbox"/> Min Wage Makeup | |
| SUI-SDI | | | | | |
| Vacation/Sick Leave | | Custom Fields | | | |
| | Rate | Start | Earned | Taken | Balance |
| Vacation hours | | | | | |
| Sick Pay Hours | | | | | |
| Compensation Time | | | | | |
| Advance | | | | | |
| Draw | | | | | |
| | | | | | 1 |
| | | | | | 2 |
| | | | | | 3 |
| | | | | | 4 |
| | | | | | 5 |

Lookup: Customer Number

Admin

act! Premium - SageBwLink

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act!™

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Search Go

Contacts << Detail View List View 1 of 1 dpSBW

Active

WARNING: Customer data will be overwritten by Sage Business Works

Customer No GOLDEN Sales Representative Jeffrey P. Bernstein Sage Company BikeWorks International
 Sales Rep No Record Manager Admin Status
 Employee No Prospect Number ID/Status Customer - Sage BWA
 Vendor No Vendor Account No Source Sage Business Works

Company Golden Gate Rentals Address 8812 Haight St. V4.0.04272015
 Contact Patti Hansen
 Salutation Patti Title City San Francisco
 Department State CA ZIP 94102
 Phone (415) 555-2245 Ext Fax (415) 555-2241 County Country

Notes History Activities Opportunities Relationships Groups/Companies Documents Financial History C / V Info Address Emp Status Web Info Social Updates Sage BusinessWorks DataPlus

View: sbw: Customer Quote Browse All.. Export to Excel

| 1 Record | Customer Number | Company | PO No | Quote No | Description | Type | Status | Quote Date | Probability | Required Date | Expiration Date | Terms | Items | Sales Rep No | Sales Rep |
|------------|-----------------|---------------------|-------|----------|----------------------|-------|---------|------------|-------------|---------------|-----------------|--------|-------|--------------|---------------|
| Drill Down | GOLDEN | Golden Gate Rentals | | 1 | Early Summer Special | Quote | Ordered | 6/1/2009 | 100 | 4/19/2016 | 5/19/2016 | Net 15 | 2 | 2 | Jeffrey P. Be |

History: sbw: Customer Quote Detail (Quote No) Export to Excel

| 2 Records | Customer Number | PO | Quote No | Quote Description | Type | QTY | Part No | Description | Price | Discount | Amount | Taxable | Ship Qty | Cancelled Qty |
|------------|-----------------|----|----------|----------------------|-------|-----|----------|-------------------------|----------|----------|----------|----------|----------|---------------|
| Drill Down | 2 | | 1 | Early Summer Special | Quote | 2 | 1002 | 24 inch bicycle, girl's | \$144.95 | \$0.00 | \$289.90 | Yes | 0 | 0 |
| Drill Down | 2 | | 1 | Early Summer Special | Quote | 4 | 396-1020 | Tire, 24 inch | \$23.95 | \$0.00 | \$95.80 | Yes | 0 | 0 |
| | | | | | | | | | 6 | \$168.90 | \$0.00 | \$385.70 | 0 | 0 |

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Lookup: Customer Number Admin

View: sbw: Customer Invoice

Lookup Selected Rows

Export to Excel

| 36 Records | Customer Number | ShipTo Customer Number | Company | Contact | Invoice No | PO No | Period | Date | Due | Description | Net | Tax | Freight | Total | Paid | Paid Date | Terms |
|----------------------------|-----------------|------------------------|----------------------|---------------|------------|----------|---------|-----------|-----------|----------------------|-------------|------------|----------|-------------|------|-----------|--------|
| Drill Down | ETC | ETC-1 | Bikes Et Cetera | Laura Spencer | 7 | 592772 | 2010/05 | 5/5/2010 | 6/4/2010 | Restocking | \$642.75 | \$0.00 | \$100.00 | \$742.75 | No | | |
| Drill Down | ETC | ETC-1 | Bikes Et Cetera | Laura Spencer | 1022 | | 2010/06 | 6/26/2010 | 7/26/2010 | | \$1,440.00 | \$0.00 | \$22.88 | \$1,462.88 | No | | |
| Drill Down | ETC | ETC-1 | Bikes Et Cetera | Laura Spencer | 1023 | 56-98563 | 2010/06 | 6/3/2010 | 7/3/2010 | | \$239.10 | \$14.35 | \$0.00 | \$253.45 | No | | Net 30 |
| Drill Down | ETC | ETC-1 | Bikes Et Cetera | Laura Spencer | 550 | | 2010/01 | 1/16/2010 | 2/15/2010 | | \$509.85 | \$0.00 | \$0.00 | \$509.85 | No | | |
| Drill Down | ETC | ETC-1 | Bikes Et Cetera | Laura Spencer | 558 | | 2010/06 | 6/30/2010 | 7/30/2010 | | \$3,954.50 | \$0.00 | \$0.00 | \$3,954.50 | No | | |
| Drill Down | GOLDEN | GOLDEN-1 | Golden Gate Rentals | Patti Hansen | 1017 | | 2010/06 | 6/30/2010 | 7/15/2010 | | \$90.95 | \$6.36 | \$15.00 | \$112.31 | No | | |
| Drill Down | GOLDEN | GOLDEN-1 | Golden Gate Rentals | Patti Hansen | 547 | 99-58746 | 2009/07 | 7/20/2009 | 8/4/2009 | Early Summer Special | \$385.70 | \$24.70 | \$25.99 | \$436.39 | No | | |
| Drill Down | GOLDEN | GOLDEN-1 | Golden Gate Rentals | Patti Hansen | 553 | | 2010/01 | 1/15/2010 | 1/30/2010 | | \$2,134.50 | \$128.08 | \$0.00 | \$2,262.58 | No | | |
| Drill Down | SHARPE | SHARPE-1 | Sharpe Wheels | Ronald Sharpe | 1 | 356793 | 2010/04 | 4/3/2010 | 4/18/2010 | 2 bikes | \$235.90 | \$13.56 | \$0.00 | \$249.46 | No | | |
| Drill Down | SHARPE | SHARPE-1 | Sharpe Wheels | Ronald Sharpe | 1012 | | 2010/04 | 4/3/2010 | 4/18/2010 | 2 bikes | \$450.00 | \$27.00 | \$0.00 | \$477.00 | No | | |
| Drill Down | SHARPE | SHARPE-1 | Sharpe Wheels | Ronald Sharpe | 551 | | 2010/02 | 2/1/2010 | 2/16/2010 | | \$1,028.75 | \$61.73 | \$0.00 | \$1,090.48 | No | | |
| Drill Down | SHARPE | SHARPE-2 | Sharpe Wheels | Ronald Sharpe | 555 | 4758 | 2010/06 | 6/19/2010 | 7/4/2010 | Special | \$214.95 | \$15.04 | \$35.65 | \$265.64 | No | | |
| Drill Down | IBS | IBS-1 | Inter. Bicycle Sales | Robert Yarmis | 3 | 993722 | 2010/04 | 4/21/2010 | 5/21/2010 | T-Shirts | \$160.00 | \$6.10 | \$10.00 | \$128.10 | Yes | 5/25/2010 | |
| Drill Down | IBS | IBS-1 | Inter. Bicycle Sales | Robert Yarmis | 1011 | | 2010/04 | 4/2/2010 | 5/2/2010 | Raleigh bikes | \$1,250.00 | \$65.98 | \$19.65 | \$1,385.63 | No | | |
| Drill Down | IBS | IBS-1 | Inter. Bicycle Sales | Robert Yarmis | 1016 | | 2010/06 | 6/14/2010 | 7/14/2010 | | \$1,148.85 | \$63.19 | \$115.00 | \$1,327.04 | Yes | 6/30/2010 | |
| | | | | | | | | | | | \$62,341.49 | \$2,742.62 | \$480.17 | \$64,931.62 | | | |

History: sbw: Customer Invoice Detail (Invoice No)

Lookup Selected Rows

Export to Excel

| Customer Number | ShipTo Customer Number | Company | Contact | Invoice No | Period | Date | Required | Shipped | Item | Description | Cost | Price | Discount | Net | Tax | Total |
|-------------------|------------------------|---------|---------|------------|--------|------|----------|---------|------|-------------|------|--------|----------|--------|--------|--------|
| No records found. | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

View: sbw: Customer Job

Lookup Selected Rows

Export to Excel

| 10 Records | Customer Number | Company | Contact | Job | Description | Status | Amount | Price | Suggested Price | Original Cost | Retainage | Period | Bid Due | Start By | Complete By | Phases | Job Cc |
|----------------------------|-----------------|-------------------------|----------------|-------------|----------------------------------|-------------|----------|-------------|-----------------|---------------|-----------|---------|-----------|-----------|-------------|--------|----------|
| Drill Down | CASH | Cash Sales | | | | | | | | | | | | | | | |
| Drill Down | ETC | Bikes Et Cetera | Laura Spencer | ETC-6/16 | ETC's 6/16 Bike Order | In Progress | \$500.00 | \$2,057.65 | \$2,577.75 | \$1,557.65 | 0.00 % | 2010/06 | 6/16/2010 | 6/17/2010 | 6/19/2010 | | 1 Martin |
| Drill Down | GOLDEN | Golden Gate Rentals | Patti Hansen | GOLDEN-6/3 | GOLDEN's 6/3 Bike Order | In Progress | | \$6,000.00 | \$5,797.15 | \$2,709.15 | 0.00 % | 2010/06 | 6/3/2010 | 6/4/2010 | 6/11/2010 | | 2 Doroth |
| Drill Down | IBS | Inter. Bicycle Sales | Robert Yarmis | IBS-6/21 | Inter. Bicycle's 6/21 Bike Order | Bid | \$10.00 | \$3,000.53 | \$5,822.15 | \$2,727.75 | 0.00 % | 2010/06 | 6/21/2010 | 6/25/2010 | 7/3/2010 | | 2 Robert |
| Drill Down | IBS | Inter. Bicycle Sales | Robert Yarmis | IBS71510 | IBS July Custom | In Progress | \$25.00 | \$3,271.83 | \$3,914.81 | \$2,617.46 | 10.00 % | 2010/06 | 6/25/2010 | 7/5/2010 | 7/15/2010 | | 3 Robert |
| Drill Down | RODEBYKE | Rodebyke Bikes & Mopeds | Susan Barnes | SHARPE-6/1 | Sharpe Wheels 6/1 Bike Order | Bid | \$50.00 | \$3,961.35 | \$5,709.65 | \$2,640.90 | 7.50 % | 2010/06 | 6/1/2010 | 6/10/2010 | 6/15/2010 | | 2 Ronald |
| Drill Down | RODEBYKE | Rodebyke Bikes & Mopeds | Susan Barnes | SHARPE-5/23 | Sharpe Wheels 5/23 Bike Order | In Progress | | \$3,500.00 | \$3,806.35 | \$2,153.20 | 5.00 % | 2010/05 | 5/23/2010 | 5/24/2010 | 5/25/2010 | | 1 Ronald |
| Drill Down | SHARPE | Sharpe Wheels | Ronald Sharpe | YATES-6/10 | Yate's 6/10/00 Custom Bike Order | In Progress | | \$11,500.00 | \$11,229.21 | \$5,230.49 | 5.10 % | 2010/06 | 6/10/2010 | 6/11/2010 | 6/22/2010 | | 2 Renee |
| Drill Down | STANS | Stan's Cyclery | Stanley Morris | | | | | | | | | | | | | | |
| Drill Down | YATES | Yates Bike Shop | Renee Yates | | | | | | | | | | | | | | |

\$585.00 \$33,291.36 \$38,857.07 \$19,636.60 2.76 %

History:

Lookup Selected Rows

Export to Excel

View: sbw: Customer Quote

Lookup Selected Rows

Export to Excel

| 2 Records | Customer Number | Company | PO No | Quote No | Description | Type | Status | Quote Date | Probability | Required Date | Expiration Date | Terms | Items | Sales Rep No | Sales Representative | SubTotal | Misc Charge |
|----------------------------|-----------------|---------------------|-------|----------|----------------------|-------|---------|------------|-------------|---------------|-----------------|--------|-------|--------------|----------------------|------------|-------------|
| Drill Down | GOLDEN | Golden Gate Rentals | | 1 | Early Summer Special | Quote | Ordered | 6/1/2009 | 100 | 4/19/2016 | 5/19/2016 | Net 15 | 2 | 2 | Jeffrey P. Bernstein | \$385.70 | \$0.00 |
| Drill Down | YATES | Yates Bike Shop | | 2 | Summer Order | Quote | Ordered | 5/15/2010 | 100 | 5/25/2010 | 5/25/2010 | Net 30 | 3 | 5 | | \$3,230.65 | \$0.00 |

\$3,616.35 \$0.00

History: sbw: Customer Quote Detail (Quote No)

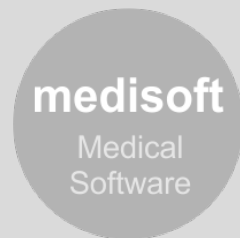
Lookup Selected Rows

Export to Excel

| 3 Records | Customer Number | PO | Quote No | Quote Description | Type | QTY | Part No | Description | Price | Discount | Amount | Taxable | Ship Qty | Cancelled Qty |
|----------------------------|-----------------|----|----------|-------------------|-------|-----|----------|------------------------|------------|----------|------------|---------|----------|---------------|
| Drill Down | 7 | | 2 | Summer Order | Quote | 5 | 1001 | 26 inch bicycle, boy's | \$182.95 | \$0.00 | \$914.75 | Yes | 0 | 0 |
| Drill Down | 7 | | 2 | Summer Order | Quote | 2 | 396-1030 | Tire, 20 inch | \$5.95 | \$0.00 | \$11.90 | Yes | 0 | 0 |
| Drill Down | 7 | | 2 | Summer Order | Quote | 1 | CUST-26 | Custom 26" bicycle | \$2,304.00 | \$0.00 | \$2,304.00 | Yes | 0 | 0 |

8 \$2,492.90 \$0.00 \$3,230.65 0 0

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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