



DataPlus Addon Software



Integrate Sage 50 CA With Act Premium!

- **DataPlus allows data mining Sage 50 CA in Act faster & more efficiently than within Sage 50 CA.**
- **Sage 50 install is not needed for every Act user.**
- **DataPlus enables you to create Customers – Vendors – Employees from Act contacts.**
- **DataPlus provides Sage 50 CA statistical and historical data in Act fields and view complete transaction data within Act Company & Contact Levels!**
- **DataPlus enables you to create Sage 50 Quotes – Estimates – Sales Orders – Invoices for your Sage customers from within Act!**
- **DataPlus enables you to import Sage 50 data into Act Custom Tables!**

Configure Sage 50 Push

Configure field mapping in Act for pushing contacts to Sage 50 CA

Allow entity creation

- Customer
- Vendor
- Employee

You can edit Customer or Vendor from within Act

Edit your Employees from within Sage 50

Configure Sage 50 CA push for Customers – Vendors – Employees

- Enable creation of Customers, Vendors & Employees from within Act!
- Manage permissions to allow creation of contacts based on Act user level
- Map Act fields to Sage 50 fields.
- If contact was originally created in Sage 50 they will be imported into Act on a scheduled basis

The screenshot shows the 'Sage 50 Connection Settings' dialog box with the 'Customer Mapping' tab selected. The 'Customer Field Mappings' section is visible, with 'Customer Push Enabled' checked. The following table shows the field mappings:

Act Field	Sage 50 Field
Customer Number	eCustomerID
Customer: Company	ID/Status
Contact	E-Mail
Street 1	Fax Phone
Street 2	Phone
City	Alternate Phone
Province	Currency Code
Postal Code	Price List
Country	Web Site

The screenshot shows the 'Sage 50 Connection Settings' dialog box with the 'Vendor Mapping' tab selected. The 'Vendor Field Mappings' section is visible, with 'Vendor Push Enabled' checked. The following table shows the field mappings:

Act Field	Sage 50 Field
Vendor Number	eVendorID
Vendor: Company	ID/Status
Contact	E-Mail
Street 1	Fax Phone
Street 2	Phone
City	Alternate Phone
Province	Currency Code
Postal Code	Tax Id
Country	Website

The screenshot shows the 'Sage 50 Connection Settings' dialog box with the 'Employee Mapping' tab selected. The 'Employee Field Mappings' section is visible, with 'Employee Push Enable' checked. The following table shows the field mappings:

Act Field	Sage 50 Field
Employee Number	eEmployeeID
Name: Contact	ID/Status
Birth Date: Birth Date	Hire Date: Emp Date Hired
Street 1: Home Address 1	SIN / SSN: Emp SSN
Street 2: Home Address 2	Pay Periods: Emp Pay Periods
City: Home Cty	Tax Table: Emp Tax Table
Province: Home Province	State Allowances: Emp State Allowance
Postal Code: Home Postal Code	State Status: Emp State Status
Phone 1: Home Phone	Federal Allowances: Emp Federal Allowances
Phone 2: Alternate Phone	Federal Status: Emp Federal Status
Employee In USA: Home Country	Dependent Allowances: Emp Dependent Allowances

Push Sage 50 Contacts

Eliminate double entry for your contacts saving you time & provide more consistency between Sage 50 and Act.

- Create prospect in Act
- Work your prospect tracking calls, meetings, emails, documents in Act
- Convert prospect to customer then push to Sage 50 from within Act

From Act Push Sage 50 CA Customers – Vendors – Employees

- Push Customer, Vendor or Employee from within Act
- Edit Customer or Vendor from within Act
- Edit Employee from within Sage 50. *Employees should be managed by Sage 50*

After contact creation in Sage 50 from Act, DataPlus will:

- Create and link contact to Company in Act Company Level
- Update Act fields with statistical information
- Provide drill down information and transactions from within Act
- Enable Act dynamic Group membership using Act fields
- If contact was originally created in Sage 50 they will be imported into Act in Company & Contact level on a scheduled basis.

Push Contact To Sage50

Choose Sage50 Entity

Customer
Create a Customer in Sage50

Vendor
Create a Vendor in Sage50

Employee
Create an Employee in Sage50

Cancel Back Next

Push Contact To Sage50

Customer Data

Customer: ABC Company Sage ID: _____

Contact: John Davis Email: _____

Street 1: 4 Gonville Street Fax: _____

Street 2: _____ Phone 1: (604) 555-8945

City: Slocan Phone 2: _____

Province: British Columbia Currency Code: _____

Postal Code: V6D4U8 Price List: _____

Country: _____ Website: _____

Cancel Back Next

Contact Information

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

Custom Protected Fields

- Warning
- Inactive
- Customer Number
- Employee Number
- Vendor Number
- Sales Rep
- Sage 50 Company
- S50 Creation Date
- S50 Last Update

Custom Unprotected Fields

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

Sage 50 CA Contact Information In Act Field

Act! Premium - Sage50CAEN

File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Help

act! Back Forward New Call Meeting To-Do Note His Topics

Contacts Detail View List View 5 of 90 dpS50CA

WARNING: Customer data will be overwritten by Sage 50 CA

InActive Sales Representative Ashcroft, Howard L. S50CA UNIVERSAL C

Customer No 33 Sales Rep Assigned Customer Ref No

Employee No Record Manager Admin Prospect Number

Vendor No ID/Status Customer Source

Company Ashburton Reinforcing Address 12 Cultus Street

Contact Steve Ashburton

Salutation Steve Title

Department City Richmond

Phone (604) 555-8471 Ext Fax (604) 555-9134 Province British Columbia Code V3M7Q3

Mobile Toll Free Phone Country

Direct Line dpFolders E-mail Ashburton@bc.ca

Time Zone Mobile E-mail Web Site

URL: <http://www.timeanddate.com/worldclock> Referred By

Personal E-mail

Creation Date

Last Update 3/28/2018

Imported

Mandatory Fields

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

Act Fields:

- Green fields in Act are by default “Read Only” fields for all Act users except Act Administrators.
- Fields can be modified to “No Access” to allow you to protect specific information.
- Most Sage 50 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 50 CA. Sage 50 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 50 CA Financial History In Act Field

act! Premium - Sage50CAEN

File Edit View Lookup Contacts Schedule Write Reports Tools Marketing Help

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

Warning: Customer data will be overwritten by Sage 50 CA

Customer No: 33 Employee No: Ashcroft, Howard L. Sales Representative: S50CA UNIVERSAL CONSTRUCTION Sales Rep Assigned: Admin Record Manager: Prospect Number: Customer RefNo:

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

CUSTOMER FINANCIAL HISTORY

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2015	\$5,194.00	\$604.20	\$201.40										\$5,999.60
Year	Prior Total	Prior YTD	Current YTD	YTD I/D %	Total								
Count				0.00 %	16								
Total					\$105,432.82								

SALES ORDERS / CONTRACTS / QUOTES

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2015			\$504.97										\$504.97
Year	Prior Total	Prior YTD	Current YTD	YTD I/D %	Total								
Count				0.00 %	2								
Total					\$504.97								

Lookup: All Contacts Notes: 0 Admin

Financial History custom fields are shared between Customer, Vendor and Employees from Sage 50.

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

Contact C / V Info Customer/Vendor Information

Inventory Sales Data

- Inv Units
- Inv Sales
- Service Units
- Service Sales
- Service Time Only Units
- Service Time Only Sales
- Items Sold

User Field Information

- 5 User Field Info
- Sync Outlook
- Internal
- Memo
- Customer Form
- Business Language
- Language Preference
- ToDo Data

Sage 50 CA Information In Act Field

The screenshot displays the Act! Premium - Sage50CAEN interface. The main window shows contact details for 'UNIVERSAL CONSTRUCTION' with a warning: 'WARNING: Customer data will be overwritten by Sage 50 CA'. Below this, the 'INVENTORY SALES DATA' section is highlighted with an orange box. It contains a table with columns for Units, Sales, and Item Sold.

	Units	Sales	Item Sold
Inventory	5	\$46,910.00	H1020;H1030;H2010;L1030;S1020
Service	3	\$580.00	
Service Time Only	3	\$580.00	

Below the table is the 'USER FIELD INFORMATION' section, which includes a memo field and various user-defined fields. A green callout bubble points to the memo field with the text: '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

Sold To Information

Employee Home Address

Sage 50 CA Additional Address Fields

The screenshot displays the Sage 50 CA software interface. The main window shows contact information for 'UNIVERSAL CONSTRUCTION'. A warning message at the top states: 'WARNING: Customer data will be overwritten by Sage 50 CA'. The contact details include 'Customer No 66', 'Employee No', 'Sales Representative', 'Sales Rep Assigned', and 'Record Manager Admin'. The 'Address' tab is selected, showing two sections: 'SHIP TO INFORMATION' and 'HOME ADDRESS'. The 'SHIP TO INFORMATION' section contains fields for Contact, Address (127 Street), City (San Antonio), Province (TX), ZIP (78216), Country, Phone, Phone 2, Fax, and E-mail. The 'HOME ADDRESS' section contains fields for Address, City, Province, Country, and Phone. The interface also features a left sidebar with navigation options like 'Contacts', 'Groups', 'Companies', 'Calendar', 'Task List', 'History List', 'Opportunities', 'Emarketing', 'Marketplace', 'Reports', 'Dashboard', 'Search', and 'Welcome'. The top menu bar includes 'File', 'Edit', 'View', 'Lookup', 'Contacts', 'Schedule', 'Write', 'Reports', 'Tools', 'Emarketing', and 'Help'. The bottom status bar shows 'Lookup: All Contacts' and 'Notes: 0'.

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

Contact Employee

Employee Information

- Job Category
- Hired
- Terminated
- Emp Date Last Paid
- Emp ToDo Date
- Emp Direct Deposit
- Birthdate

Employee Custom Fields

Employee Accounts

- Pay Period
- Wage Exp
- Expense
- Dep Expense
- Tax Table

Employee Notes

Sage 50 CA Employee Information

The screenshot displays the Act! Premium - Sage50CAEN software interface. The main window shows the 'Employee Information' and 'CUSTOM FIELDS' sections. The 'EMPLOYEE INFORMATION' section includes fields for Job Category, SSN, Hired, Terminated, Emp Date Last Paid, Emp To Do Date, Emp Direct Deposit, and Birth Date. The 'CUSTOM FIELDS' section includes five Emp Field1 through Emp Field5, each with a checkbox. Below these are 'ACCOUNTS' fields for Pay Period, Wage Exp, Expense Account, Dep Expense Account, and Tax Table. An orange box highlights the 'EMPLOYEE INFORMATION' and 'CUSTOM FIELDS' sections. A green speech bubble points to the 'EMPLOYEE INFORMATION' section with the text: 'You can choose to import Employee data into Act and set field level permissions 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 50 CA / Act Unique IDs

Contact Status

Sage 50 ID's

- eCustomerID
- eLocationID
- eEmployeeID
- eVendorID
- eActContactID
- S50CA Last Import

Contact Subscribe

DataPlus Help Links

The screenshot displays the Act! Premium - Sage50CAEN software interface. The main window shows contact details for 'UNIVERSAL CONSTRUCTION' with a warning: 'WARNING: Customer data will be overwritten by Sage 50 CA'. The contact is assigned to 'Sales Representative' and 'Sales Rep Assigned' is 'Admin'. The contact number is '66'. The 'Sage 50 ID's' section is highlighted with an orange box and contains the following information:

Sage 50 ID'S	
eCustomerID	66
eLocationID	66
eEmployeeID	
eVendorID	
eActContactID	
S50CA	3/28/2018 5:08 AM

Below the Sage 50 ID's section, there are links for 'act!marketing' and 'DataPlus cloud'. The 'act!marketing' link is 'http://www.swiftpage.com' and the 'DataPlus cloud' link is 'http://www.swiftpage.com'. The 'Sage 50 Accounting CA' section contains the following links:

- Client Portal: <http://hogandata.com/clients>
- DataPlus Knowledge Base: <http://kb.hogandata.com>
- Online Support: <http://help.hogandata.com>
- Help Desk: <http://helpdesk.hogandata.com>
- ACTeStore: <http://ACTeStore.com>
- Sign up for Act marketing: <http://www.swiftpage.com>
- Application URL: <http://na.sage.com/sage-50-accounting-ca>
- Application Login: <https://sagecity.na.sage.com/login.aspx>

A green speech bubble on the right side of the screenshot contains the text: '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 50 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 Opportunities

Custom Protected Act Fields

- Customer No
- Company
- Sales Rep
- Create Date
- Shipping Date
- Expiration Date
- Expiration Days
- Document No
- Transaction No
- Type
- Sage 50 Status
- Terms
- Source
- Is Taxable
- Total Tax
- Ship To Information
- Notes
- Item List
- eCustomerID
- eDocumentID

Sage 50 Transactions Imported to Act Opportunity

Opportunity
Name: 55/Osborne Packaging <205>

Totals		Customer No	55
Total	\$30.00	Company	Osborne Packaging
Weighted	\$13.50	Sales Representative	Sianos, Janice
Probability	45	Record Manager	Admin

Open/Close Days
Open Date: 1/31/2015
Days Open: 1,155
Est. Close Date: 2/11/2015
Act. Close Date:

Status
 Open
 Closed - Won
 Closed - Lost
 Inactive

Process/Stage
Process: ACT! Sales Cycle
Stage: Presentation

Dates
Create: 1/31/2015
Ship: 2/11/2015
Expiration: 2/11/2015
Expiration Days: 11

DATAPLUS
Act! Opportunity Import

Sage 50
Company &
Sales Rep

Sage 50
Statistics

Opportunity Statistics

Document		Taxes	
Document No	205	<input checked="" type="checkbox"/> Is Taxable	
Transaction No		Tax Code	GP - TPS 7.00%, TVQ 7.50%
Type	Estimate	Total Tax	\$15.60
Status	Open	Ship To	
Terms	Net Days: 60	Osborne Packaging	
Source	Sage 50 - Estimate	Steve Ashburton	
Notes		12 Cultus Street	
		Richmond, British Columbia	
		V3M 7Q3	
Item List			

Sage 50
Transaction
Notes

Every item in Act
Opportunity is
listed and
updated daily!

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

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

Sage 50 Transactions Transaction Menu

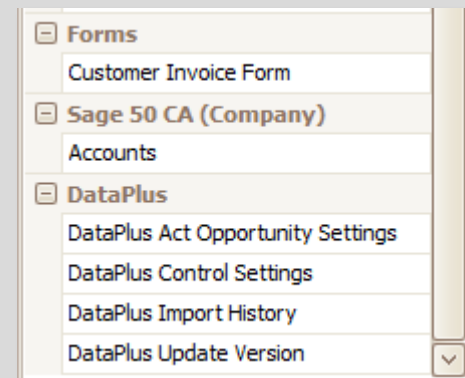
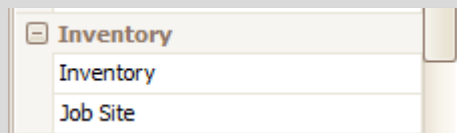
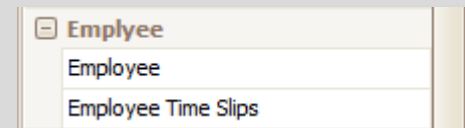
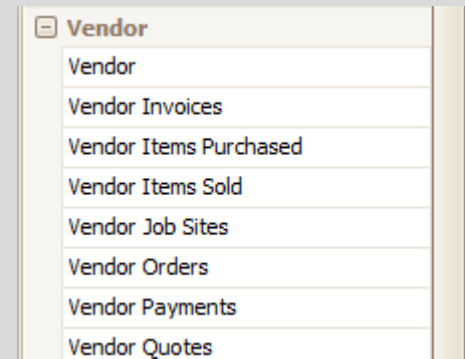
DataPlus provides relational transaction menu for Customer, Vendor, Employee & Inventory.

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 50 CA Transactions Menu



Sage 50 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 50 CA Transactions Menu

Relational transactions for contact are displayed in "DataPlus" Tab

Customer No: 40, Sales Rep Assigned: Admin, Customer Ref No: Prospect Number, Vendor No: ID/Status: Customer, Source: Canadian Edition, Integrate Sage 50 Accounting

Company: DAB Collision Ltd, Address: 2650 No 3 Road, Creation Date: 11/21/2007

Contact: Sukhi Dylan

View:	S50: Customer Estimates	Export to Excel															
3 Records	Customer Number	Company	Contact	Estimate No	Period Lookup	Date	Ship Date	Amount	Freight	Tax	Total	Disc %	Days	Net Days	Message	Sold To	Sold To
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	207	2015/01	1/31/2015	2/11/2015	\$179.00		\$23.27	\$202.27	2	30	60		DAB Collision Ltd	Sukhi D
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	208	2015/02	2/28/2015	3/3/2015	\$299.00		\$38.87	\$337.87	2	30	60		DAB Collision Ltd	Sukhi D
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	211	2015/03	3/31/2015		\$149.50		\$19.44	\$168.94	2	30	60		DAB Collision Ltd	Sukhi D

Click on "Drill Down" to show Customer Estimate's Detail Estimate line items are displayed

History: S50: Customer Estimates Details (Estimate No)

3 Records	Customer Number	Company	Contact	Estimate No	Date	Ship Date	Item	Qty	Order	Unit	Unit Type	Item Description	Price	Amount	Discount	Tax	Freight	Total
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	211	3/31/2015		H2520			50.00	Pound	Stocking	Nails: Wood	\$1.79	\$89.50		\$11.64	\$101.14
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	211	3/31/2015		F1020			1.00	Section	Stocking	Fence	\$60.00	\$60.00		\$7.80	\$67.80
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	211	3/31/2015						Stocking							

Click on "Drill Down" to show all related items sold Estimate Detail items sold are listed for the related Estimate.

History: S50: Customer Items Sold (Item)

1 Record	Customer Number	Company	Contact	Transaction #	Invoice No	Period Lookup	Date	Item	Quantity	Unit	Description	Price	Amount	Sales Representative
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	475	17814	2015/03	3/31/2015	H2520	50.00	Pound	Nails: Wood	\$1.79	\$89.50	Rumphy, Belinda

Click on "Drill Down" to show all items show details of Customer Estimates

History: S50: Customer Items Sold (Customer Number)

13 Records	Customer Number	Company	Contact	Transaction #	Invoice No	Period Lookup	Date	Item	Quantity	Unit	Description	Price	Amount	Sales Representative	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	187	17810	2014/01	1/8/2014	L2130	100.00	Board	Lumber: 2x10	\$8.25	\$825.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	187	17810	2014/01	1/8/2014	R1001	20.00	Package	Roofing: Asphalt Tile	\$21.50	\$430.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	187	17810	2014/01	1/8/2014	R1010	100.00	Roll	Roofing: Rolled	\$9.35	\$935.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	187	17810	2014/01	1/8/2014	R1020	200.00	Bundle	Roofing: Shakes	\$28.70	\$5,740.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	276	17827	2014/03	3/25/2014	H8010	87.50	Quart	Paint Stripper	\$8.10	\$2,835.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	276	17827	2014/03	3/25/2014	H9010	59.00	Pint	Glue: Plastic	\$4.00	\$236.00	Rumphy, Belinda	
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	276	17827	2014/03	3/25/2014	L2101	500.00	Board	Lumber: 2x4	\$3.70	\$1,850.00	Rumphy, Belinda	
												1470.50	\$1,899.89	\$37,830.50	

Sage 50 Transactions Browse All Menu

DataPlus "Browse All" allows you lookup all transactions in Sage 50 then lookup one or multiple Customers or Vendors.

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

Sage 50 CA Browse All Transactions Menu

Lookup by Customer

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

Group by column

Totals columns

Lookup every item sold & drill down to invoice.

View: S50: Customer

34 Records	Customer Number	Company	Contact	Address 1	Address 2	City	Province	Postal Code	Alternate Phone	Fax Phone	E-mail	Web
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	12 Cultus		Richmond	British Columbia			(604) 555-9134	Ashburton@bc.ca	
Drill Down		Customer Contracts (Customer Number)	Noel Mulronev			Richmond	British Columbia				Askew@bc.ca	
Drill Down		Customer Estimates (Customer Number)	Hugo C. Lamore			Bayswater	British Columbia			(604) 555-3428	Bayswater@bc.ca	
Drill Down		Customer Invoices (Customer Number)	Susan Hymn			Vancouver	British Columbia				Belvedere@bc.ca	
Drill Down		Customer Job Sites (Customer Number)	Tyler Lincoln			New Westminster	British Columbia					
Drill Down		Customer Receipts (Customer Number)	Helen Grano	12		West Vancouver	British Columbia			(604) 555-8945		
Drill Down			Chris Eberhardt	8940 Burr		Vancouver	British Columbia			(604) 555-4113	Chris@bc.ca	

View: S50: Customer Invoices (Customer Number)

5 Records	Customer Number	Company	Contact	Transaction #	Invoice No	Period Lookup	Date	Date Due	Type	Subtotal	Amount Owing	Disc %	Days	Net Days	Message	
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	403	17811	2015/02	2/28/2015	4/29/2015	Invoice	\$190.00	\$201.40	\$201.40	2	30	60 Thank you	
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	477	27848	2015/03	3/31/2015	5/30/2015	Invoice	\$190.00	\$11.40	\$201.40	\$201.40	2	30	60 Thank you
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	183	27817	2014/11	11/8/2014	1/7/2015	Invoice	\$33,160.00	\$4,310.80	\$37,470.80	\$37,470.80	2	30	60 Thank you
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	232	17808	2015/03	3/31/2015	5/30/2015	Invoice	\$33,160.00	\$4,310.80	\$37,470.80	\$37,470.80	2	30	60 Thank you
										\$47,490.00	\$0.00	\$6,270.60	\$53,760.60	\$614.80		

View: S50: Customer Estimates

14 Records	Company	Contact	Estimate No	Period Lookup	Date	Ship Date	Amount	Freight	Tax	Total	Disc %	Days	Net Days	Message	Sold To	Sold To L1	Sold To L2
Drill Down	Customer Number: 38	Cavendish, Peter S.	Helen Grano	210	2015/03	3/31/2015	\$179.00	\$0.00	\$10.74	\$189.74	2	30	60		Cavendish, Peter S.	Helen Grano	123 Plimmerton
Drill Down	Customer Number: 40	DAB Collision Ltd	Sukhi Dylan	208	2015/03	3/31/2015	\$179.00	\$0.00	\$23.27	\$202.27	2	30	60		DAB Collision Ltd	Sukhi Dylan	No 3 Road
Drill Down	DAB Collision Ltd	Sukhi Dylan	208	2015/03	3/31/2015	3/3/2015	\$299.00	\$0.00	\$38.87	\$337.87	2	30	60		DAB Collision Ltd	Sukhi Dylan	No 3 Road
							\$1,659.99	\$0.00	\$203.28	\$1,863.27							

View: S50: Customer Estimates Details (Estimate No)

2 Records	Customer Number	Company	Contact	Estimate No	Date	Ship Date	Item	Qty	Order	Unit	Unit Type	Item Description	Price	Amount	Discount	Tax	Total	Account	Customer Sales Repre		
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	208	2/28/2015	3/3/2015	H2520	100.00	Pound	Stocking		Nails: Wood	\$1.79	\$179.00	\$0.00	\$23.27	\$202.27	Sales: Hardware	Rumphy, Belinda		
Drill Down	40	DAB Collision Ltd	Sukhi Dylan	208	2/28/2015	3/3/2015	F1020	2.00	Section	Stocking		Fence	\$60.00	\$120.00	\$0.00	\$38.87	\$135.60	Sales: Lumber	Rumphy, Belinda		
													\$30.90	\$299.00	\$0.00	\$38.87	\$0.00	\$337.87			

View: S50: Customer Items Sold

325 Records	Customer Number	Company	Contact	Transaction #	Period Lookup	Date	Item	Quantity	Unit	Description	Price	Amount	Sales Representative	
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	34	2013/07	7/19/2013	H1020	250.00	Each	Handles: Locking	\$25.00	\$6,250.00		
Drill Down	33	Ashburton Reinforcing	Steve Ashburton	34	2013/07	7/19/2013	H1030	250.00	Each	Handles: Passage	\$30.00	\$7,500.00		
Drill Down	35	Bayswater School Board	Hugo C. Lamore	34	2013/07	7/23/2013	H2510	1150.00	Pound	Nails: Finish	\$2.72	\$3,128.00		
Drill Down	35	Bayswater School Board	Hugo C. Lamore	34	2013/07	7/23/2013	L1010	100.00	Sheet	Plywood: 1/4"	\$23.65	\$2,365.00		
											134847.33	\$52,525.42	\$2,018,304.92	

View: S50: Customer Invoices (Invoice No)

1 Record	Customer Number	Company	Contact	Transaction #	Period Lookup	Date	Date Due	Type	Subtotal	Freight	Sales Tax	Total	Amount Owing	Disc %	Days	Net Days	Message
Drill Down	35	Bayswater School Board	Hugo C. Lamore	34	2013/07	7/23/2013	9/21/2013	Invoice	\$5,493.00	\$0.00	\$0.00	\$5,493.00	\$0.00		2	30	60 Thank you for
										\$5,493.00	\$0.00	\$0.00	\$5,493.00	\$0.00			

Sage 50 Transactions

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 50 CA in Act faster & more efficiently than within Sage 50 CA.

DataPlus provides an all in one solution for your business.

Sage 50 CA Browse All Transactions Menu

The screenshot displays the Sage 50 CA interface with several 'Browse All' windows open. The main window shows 'S50: Customer Contracts' with 8 records. A second window shows 'S50: Customer Estimates' with 3 records. A third window shows 'S50: Customer Receipts' with 93 records. A fourth window shows 'S50: Customer Receipts Details' for a specific receipt. Green callouts labeled 'Contracts', 'Estimates', and 'Receipts' point to their respective windows. The interface includes fields for Customer No (40), Vendor No, Company (DAB Collision Ltd), and Contact (Sukhi Dylan). It also shows a list of transactions with columns for Estimate No, Period Lookup, Date, and Ship Date. The bottom of the screen displays financial totals: 1470.50, \$1,899.89, and \$37,830.50.

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

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

More DataPlus Addons



Integrated Software
MS SQL – MySQL – Oracle
SAP – DB2 – Pervasive
FoxPro - MS Access and
[more...](#)

Hogan Data – Working For You

Act Certified Consultant – Act Developer

QuoteWerks Partner – QuoteWerks Developer

Sage Software Partner – Sage Software Developer

QuickBooks Partner – QuickBooks Developer



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