



DataPlus Addon Software



Integrate Sage 50 US With Act Premium!

- **DataPlus allows data mining Sage 50 US in Act faster & more efficiently than within Sage 50 US.**
- **Sage 50 install is not needed for every Act user.**
- **DataPlus enables you to create Customers & Vendors from Act contacts.**
- **DataPlus provides Sage 50 US 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 – Proposals – Sales Orders – Sales Invoices for your Sage customers from Act Opportunities.**
- **DataPlus enables you to import Sage 50 data into Act Custom Tables!**

Configure Push

Configure field mapping in Act for pushing contacts to Sage 50

Allow entity creation

- Customer
- Vendor

You can edit Customer or Vendor from Act

Edit your Employees or Salespersons in Sage 50

Configure Customer & Vendor Push to Sage 50

- Enable creation of Customers, Vendors 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

Act! - Configuration - v1.0

Sage50-US Connection Settings

Connection Quotes Sales Orders Sales Invoices **Customers** Vendors Identifiers [Reset to default](#)

Customer Pu

ACT Field	Sage50 Field	Required
City	AddressCity	<input checked="" type="checkbox"/>
Address 1	AddressLine1	<input checked="" type="checkbox"/>
State	AddressState	<input checked="" type="checkbox"/>
Zip Code	AddressZip	<input checked="" type="checkbox"/>
Contact	Contact	<input checked="" type="checkbox"/>
Company	CustomerBillToName	<input checked="" type="checkbox"/>
Customer Number	CustomerID	<input checked="" type="checkbox"/>
First Name	FirstName	<input checked="" type="checkbox"/>
Last Name	LastName	<input checked="" type="checkbox"/>
Phone	Telephone1	<input checked="" type="checkbox"/>
Country	AddressCountry	<input type="checkbox"/>
Address 2	AddressLine2	<input type="checkbox"/>
Company	AddressName	<input type="checkbox"/>
Tax Code	AddressTaxCode	<input type="checkbox"/>
Batch Delivery Method	BatchDeliveryMethod	<input type="checkbox"/>
	BatchEmailSalesRep	<input type="checkbox"/>
Account Number	CustomerAccountNumber	<input type="checkbox"/>
Type	CustomerType	<input type="checkbox"/>

Cancel Save

Act! - Configuration - v1.0

Sage50-US Connection Settings

Connection Quotes Sales Orders Sales Invoices Customers **Vendors** Identifiers [Reset to default](#)

Vendor Push

ACT Field	Sage50 Field	Required
Address 1	AddressLine1	<input checked="" type="checkbox"/>
City	City	<input checked="" type="checkbox"/>
Contact	Contact	<input checked="" type="checkbox"/>
State	State	<input checked="" type="checkbox"/>
Phone	Telephone1	<input checked="" type="checkbox"/>
Vendor Number	VendorID	<input checked="" type="checkbox"/>
Company	VendorName	<input checked="" type="checkbox"/>
Zip Code	Zip	<input checked="" type="checkbox"/>
Account Number	AccountNumber	<input type="checkbox"/>
Address 2	AddressLine2	<input type="checkbox"/>
Country	Country	<input type="checkbox"/>
E-mail	Email	<input type="checkbox"/>
Fax Phone	Fax	<input type="checkbox"/>
InActive	Inactive	<input type="checkbox"/>
Tax ID Number	TaxIDNumber	<input type="checkbox"/>
Alternate Phone	Telephone2	<input type="checkbox"/>
Type	VendorType	<input type="checkbox"/>
Web Site	Web	<input type="checkbox"/>

Cancel Save

Push Sage 50 Contacts

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

Contact Work Flow

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

Push Customer and Vendor to Sage 50

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

After push a scheduled import from Sage 50 to Act will:

- Create and link contact to Company in Act Company Level
- Update Act fields with statistical information
- Provide drill down information and transactions in 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.

Field	Value
AddressCity*	Flossmoor
AddressCountry	United States
AddressLine1*	1222 Brassie Ave, Suite 19
AddressLine2	
AddressName	ET Products, Inc.
AddressState*	IL
AddressTaxCode	OOS
AddressZip*	60422
BatchDeliveryMethod	E-mail
BatchEmailSalesRep	
Contact*	Jenni Ranft
CustomerAccountNumber	
CustomerBillToName*	ET Products, Inc.
CustomerID*	ETProducts
CustomerType	
CustomField_1	
EMail	ap@etproducts.com
Fax	

Contact Information

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

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 Contact Information In Act Field

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

Detail View List View 1 of 7 SAGE50

InActive IsProspect IsParent **WARNING: Customer data will be overwritten by Sage 50** Sage Co SBD Ma on

Customer Number BELLDISCOUNT Sales Rep ID Account No
Contact Number C-1 Sales Representative Customer Ref No BELLDISCOUNT
Employee Number Record M Admin Prospect Number
Vendor Number Sales Rep Sage 50 Source

Company Bellwether Discount Supplies **Address** 3445 Breckendridge Rd **Creation Date**
Contact Stewart Mahon **City** Norcross **Last Update**
Salutation Stewart Title **State** GA **ZIP** 30093 **4/13/2020**
Department **County** **Country** USA **Imported**
Phone (770) 555-8700 Ext Fax (770) 555-8712 **Yes**
Mobile Toll Free Phone
Direct Line dpFolders **E-mail**
Time Zone Mobile E-mail **Referred By** **Mandatory Fields**
URL <http://www.timeanddate.com/> **Personal E-mail**

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. Sage 50 wins!

Contact Financial History

Customer / Vendor / Salesperson

Sales / Purchase History

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

SO / PO History

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

Sage 50 Financial History In Act Field

The screenshot displays the Act! Premium - Sage50 interface. The main window shows the contact details for BELLDISCOUNT, including the company name, address, and various identifiers. Below this, there are two tables: 'MONTHLY INVOICE AND SALES ANALYSIS' and 'MONTHLY SALES ORDER ANALYSIS'. The 'MONTHLY INVOICE AND SALES ANALYSIS' table shows data for the years 2019 and 2020, with columns for each month and a total. The 'MONTHLY SALES ORDER ANALYSIS' table shows data for the years 2019 and 2020, with columns for each month and a total. The interface also includes a search bar and a navigation pane on the left.

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2020		\$12,333.95	\$15,412.15										\$27,746.10
2019											\$6,089.82	\$6,089.82	

Year	Prior Total	Prior YTD	Current YTD	Difference	Total	Invoice Date
Count	1		3	100.00 %	4	First 11/30/2019
Total	\$6,089.82		\$27,746.10	\$27,746.10	\$33,835.92	Last 3/15/2020

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2020	\$12,333.95	\$19,480.21											\$31,814.16

Year	Prior Total	Prior YTD	Current YTD	Difference	Total	SO Open	PO Open
Count			2	%	2	1	
Total			\$31,814.16	\$31,814.16	\$31,814.16	\$19,480.21	

- Financial History custom fields are shared between Customer, Vendor and Salesperson from Sage 50.
- Salesperson data represents total Sales / SO based on their assigned customers.
- Data is updated on a scheduled basis using MS Task Scheduler.

Contact C / V Info Customer/Vendor Information

Inventory Sales Data

- Activity Units
- Assembly Units
- Charge Units
- Labor Units
- Non-Stock Units
- Service Units
- Stock Units
- SN Stock Units

Contact Info

- Sales Rep
- Ship Via
- Sales Account
- Pricing Level
- Batch Delivery Method
- Items Sold
- 5 User Field Info
- Tax ID
- Type 1099
- Expense Account
- Sales Tax Rate
- Ticket Information
- Items Sold (Item #)
- Items Sold (UPC/SKU)

Sage 50 Information In Act Field

The screenshot displays the Act! Premium - Sage50 interface. The main window shows customer details for 'Bellwether Discount Supplies' with fields for Customer Number (BELLDISCOUNT), Sales Rep ID, Sales Representative, Record Manager (Admin), ID/Status (Customer Sage 50), Sage Co (SBD Manufacturing & Distribution), Account No, Customer Ref No (BELLDISCOUNT), Prospect Number, and Source. The address is 3445 Breckendridge Rd.

The 'INVENTORY SALES DATA' section includes a table with columns for Activity Items, Units, and Sales:

Activity Items	Units	Sales
Assembly	3	\$3,299.85
Charge Item		
Labor		
Non-stock Item		
Service		
Stock Item	54	\$24,396.15
SER Stock Item		
Total Count	57	\$27,696.00

The 'INFORMATION' section contains fields for Resale Number, Shipping Method (Airborne), GL Sales Account (40000-EQ), Type (Retail), Tax Code, Batch Delivery Method (Paper form), Tax ID Number, Type 1099, GL Expense Account, Customer Since (12/26/2015), and Sales Tax Rate. It also includes a 'Ticket Information' section with fields for Ticket Count, Ticket Duration, Ticket Amt, Ticket Count Open, Ticket Duration Open, and Ticket Amt Open.

The 'ITEMS SOLD / PURCHASED' section shows two columns: 'Item Sold' and 'UPC/SKU Sold'. The 'Item Sold' column lists various item codes like EQFF-13120, EQFF-13130, EQFF-13140, EQLW-14100, EQLW-14110, EQLW-14160, EQLW-14170, EQLW-35200, EQLW-35210, and MOWER-164W. The 'UPC/SKU Sold' column lists similar codes.

A green speech bubble points to the 'ITEMS SOLD / PURCHASED' section with the text: "Every item Customer purchased is listed and updated daily!"

Item Sold memo field contains every item purchase by Customer.

Create Customer dynamic groups based on items purchased or not!

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

Contact Financial Info

Customer/Vendor Information

Receivable / Payable

- Last Invoice
- Last Payment
- Last Statement
- Total Sales/Purchases
- Days to Pay Invoices
- Open PO No
- On Hold

AR / AP Aging

- Current
- 30, 60, 90, 90+
- Total

Quote History

- Customer/Prospect
- Open / Loss

Terms & Credit

- Due Terms
- Discount Info
- Finance Charge
- Credit Status

Sage 50 Financial Information In Act Field

The screenshot displays the Act! Premium - Sage50 interface. The main window shows the 'Financial Info' tab for a customer named 'Bellwether Discount Supplies'. The interface is divided into several sections:

- Customer Information:** Includes fields for Customer Number (BELLDISCOUNT), Sales Representative, Record Manager (Admin), ID/Status (Customer Sage 50), Sage Co (SBD Manufacturing & Distribution), Account No, Customer Ref No (BELLDISCOUNT), and Prospect Number.
- Company & Address:** Company name is 'Bellwether Discount Supplies' and the address is '3445 Breckendridge Rd'.
- ACCOUNTS RECEIVABLE/PAYABLE:** A table showing 'Last Invoice' on 3/15/2020 for \$99.90, 'Last Payment' on 2/16/2020 for \$12,090.87, and 'Total Sales/Purchases' of \$33,835.92. The 'Current Bal' is \$15,512.05.
- AR / AP AGING:** A table showing 'Current' balance of \$15,412.15, with columns for 30, 60, 90, and 90+ day aging periods. The 'Total Due' is \$15,412.15.
- QUOTE HISTORY:** A table showing 'Open' and 'Lost' quotes for 'Customers' and 'Prospects'.
- Terms & Credit:** Includes fields for 'Due Terms' (30), 'Discount Days' (10), 'Discount Percent' (2.00000), 'Charge Finance Chrg', 'Credit Limit' (\$15,000.00), and 'Credit Status' (No Credit Limit).

The interface also features a search bar, navigation buttons (Back, Forward, New, Call, Meeting, To-Do, Note, History, E-mail, Help), and a sidebar with various icons. A warning message at the top states: 'WARNING: Customer data will be overwritten by Sage 50'.

Financial information updated daily.

Create Customer dynamic groups based on last invoice, aging, credit!

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

Contact Addresses

Sold To Information

Ship To Address

Payment Address

Home Address

Sage 50 Additional Address Fields

The screenshot displays the Act! Premium - Sage50 software interface. The main window shows contact details for 'Bellwether Discount Supplies'. The 'Address' field is highlighted with a red box and contains the text '3445 Breckendridge Rd'. Below this, there are three address sections: 'SHIP TO ADDRESS', 'HOME ADDRESS', and 'PAYMENT ADDRESS'. Each section has fields for Address, City, State, ZIP, and Country. The 'SHIP TO ADDRESS' section is pre-filled with '3445 Breckendridge Rd', 'Norcross', 'GA', and '30093'. The 'HOME ADDRESS' and 'PAYMENT ADDRESS' sections are empty. The interface also includes a top menu bar, a toolbar with icons for Back, Forward, New, Call, Meeting, To-Do, Note, History, E-mail, and Help, and a search bar. A warning message at the top states 'WARNING: Customer data will be overwritten by Sage 50'. The bottom status bar shows 'Lookup: Customer Number' and 'Admin'.

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

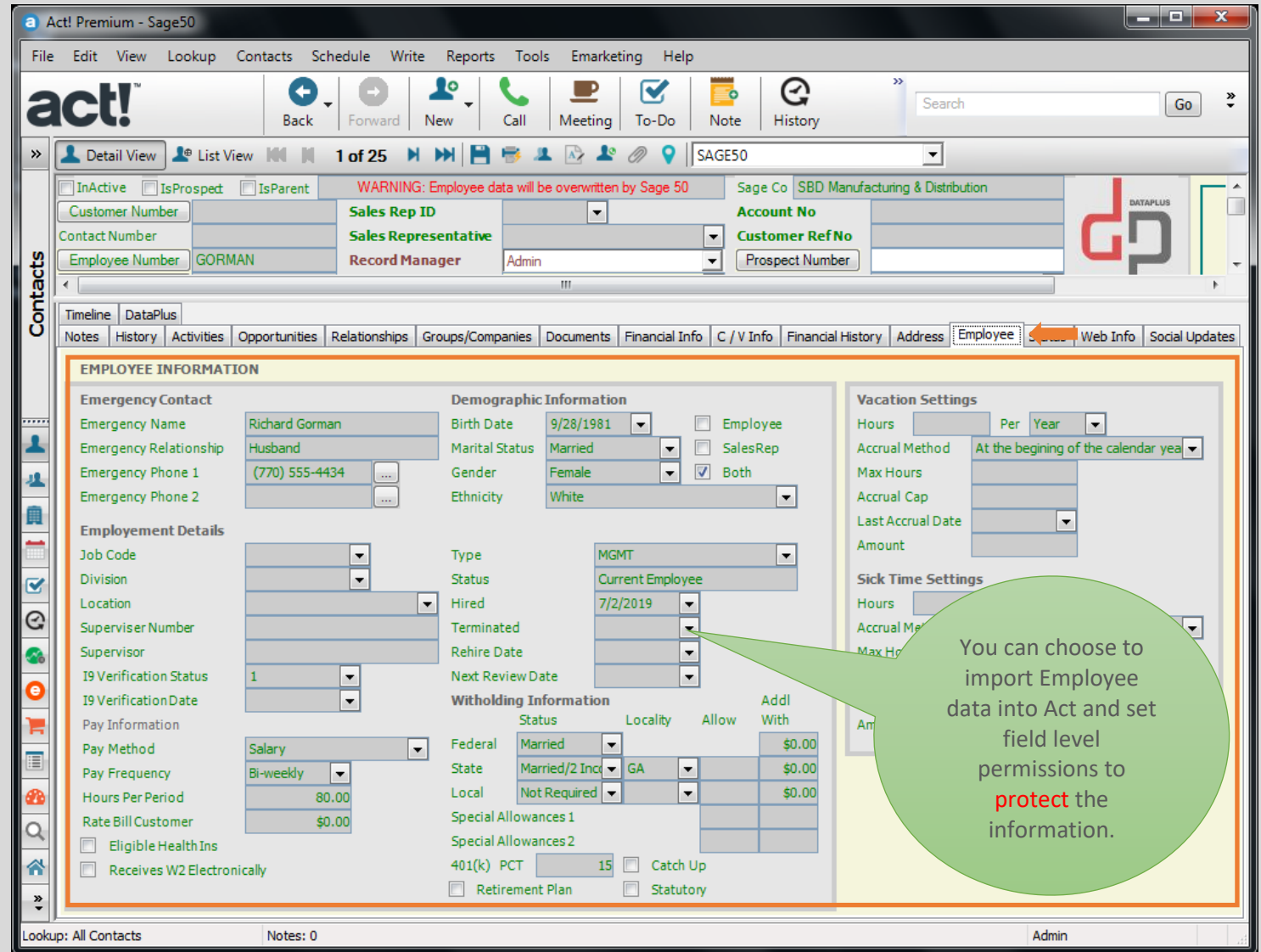
- Are no access except for admin

Employee Accounts

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

Employee Notes

Sage 50 Employee Information



act! Premium - Sage50

File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Help

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

Detail View List View 1 of 25 SAGE50

WARNING: Employee data will be overwritten by Sage 50

Sage Co SBD Manufacturing & Distribution

Customer Number Sales Rep ID Account No

Contact Number Sales Representative Customer Ref No

Employee Number GORMAN Record Manager Admin Prospect Number

Timeline DataPlus

Notes History Activities Opportunities Relationships Groups/Companies Documents Financial Info C / V Info Financial History Address Employee Web Info Social Updates

EMPLOYEE INFORMATION

Emergency Contact

Emergency Name: Richard Gorman
Emergency Relationship: Husband
Emergency Phone 1: (770) 555-4434
Emergency Phone 2:

Demographic Information

Birth Date: 9/28/1981
Marital Status: Married
Gender: Female
Ethnicity: White

Employment Details

Job Code:
Division:
Location:
Supervisor Number:
Supervisor:
I9 Verification Status: 1
I9 Verification Date:
Type: MGMT
Status: Current Employee
Hired: 7/2/2019
Terminated:
Rehire Date:
Next Review Date:

Withholding Information

Status	Locality	Allow	With
Federal	Married		\$0.00
State	Married/2 Inc	GA	\$0.00
Local	Not Required		\$0.00

Special Allowances 1
Special Allowances 2
401(k) PCT: 15
Retirement Plan:
Catch Up:
Statutory:

Vacation Settings

Hours:
Per: Year
Accrual Method: At the beginning of the calendar year
Max Hours:
Accrual Cap:
Last Accrual Date:
Amount:

Sick Time Settings

Hours:
Accrual Method:
Max Hours:

You can choose to import Employee data into Act and set field level permissions to protect the information.

Lookup: All Contacts Notes: 0 Admin

Data is set to no access by Administrator by user Level or 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 50 ID's

- eCustomerID
- eLocationID
- eEmployeeID
- eVendorID
- eActContactID
- S50US Last Import
- S50US Last Import Time

Contact Subscribe

DataPlus Help Links

Sage 50 / Act Unique IDs

The screenshot displays the Act! Premium - Sage50 software interface. The main window shows contact details for a contact named 'BELLDISCOUNT'. The 'Sage 50 ID's' section is highlighted with a red box and contains the following information:

Sage 50 ID's	Value
eCustomerID	{5FC8964A-9CB8-4FC1-9C3B-DEF834C2B301}
eLocationID	{5FC8964A-9CB8-4FC1-9C3B-DEF834C2B301}
eContactID	{5FC8964A-9CB8-4FC1-9C3B-DEF834C2B301}
eEmployeeID	
eVendorID	
S50 LastUpdate	4/13/2020 4:20 PM
eActContactID	
DM Last Runtime	
DM Message	

A green callout bubble points to the eCustomerID field, stating: "Unique ID's are used to map contact in Sage 50 with Act contact or company." The interface also shows various other fields like 'Customer Number', 'Sales Rep ID', and 'Account No'. The bottom status bar indicates 'Lookup: Customer Number' and 'Notes: 0'.

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

Manage Act Opportunity

- Create Sage 50 Process
- Create Sage 50 Stages Items import to Act Product List
- Create Sage 50 Process & Stages

Manage Product List

- DataPlus imports items from Sage 50 to Product List

Push Act Opportunity to Sage 50 Transactions

Configure & Manage Act Opportunity

Create Sage 50 Opportunity Process

Create Sage 50 Stages

The screenshot shows a window titled 'Manage Process Lists' with a 'Details' sidebar on the left. The main area is titled 'Enter opportunity process name and description'. It contains the following fields:

- Opportunity process:
- Description (optional):
- Active

Customize stages for Sage 50

/	Name	Description	Probability
1	Quote Open		45%
2	Quote Inactive		0%
3	Quote Expired		0%
4	Proposal Open		50%
5	Proposal Accepted		100%
6	Proposal Closed		100%
7	Proposal Closed Ac		0%
8	Proposal Inactive		0%
9	Proposal Expired		0%
10	Sales Order Open		85%
11	Sales Order Closec		100%
12	Invoice Unpaid		100%
13	Invoice Paid		100%
14	Invoice Voided		0%

DataPlus imports Sage 50 Items to Product list.

The screenshot shows a window titled 'Manage Product List' with a table of items. The table has columns for Name, Item Number, Cost, and Price. The first row is highlighted in blue.

Name	Item Number	Cost	Price
Activity Item	Activity	\$0.0000	\$100.0000
Classic 16" reel mower v	MO/WER-164W	\$138.2200	\$219.9900
Classic 18" reel mower v	MO/WER-184W	\$0.0000	\$239.9900
Classic 20" reel mower v	MO/WER-204W	\$148.0200	\$239.0000
Cushioned handle assem	PTHANDLE-ASM	\$21.8200	\$0.0000
SBD-Gro Aerator/Soil Dig	EQLW-14100	\$15.9500	\$39.9900
SBD-Gro All-Purpose Pla	EQFF-13120	\$3.9500	\$9.9900
SBD-Gro Drop Spreader	EQLW-14170	\$23.9500	\$29.9900
SBD-Gro Electric Nylon !	EQLW-14150	\$32.9500	\$59.9900
SBD-Gro Gas-Powered L	EQLW-14110	\$59.9500	\$149.9900
SBD-Gro Half-Moon Turf	EQLW-35200	\$7.9500	\$16.9900
SBD-Gro Hose-End Plas	EQFF-13130	\$5.2000	\$12.9500
SBD-Gro Rotary Broadca	EQLW-14160	\$23.9500	\$59.9900
SBD-Gro Rotary Turf Edg	EQLW-35210	\$7.9500	\$19.9900
SBD-Gro Soil Test Kit w/	EQFF-13140	\$7.9500	\$19.9900

Currently available in DataPlus Sage 50 US Act database.

Act Opportunities

Create New Act Opportunity

Preferably from contact level, create Act Opportunity

- Name your opportunity
- Populate Open date and Est. Close Date
- Add products / services to opportunity

Push Act Opportunity

- From menu item in Act Push transaction
- Quotes..
- Sales Orders..
- Sales Invoices..

Push Act Opportunity to Sage 50 Transactions

Create Act Opportunity

Opportunity Statistics

Name: BELLWETHER

Totals: Total \$717.00, Weighted \$71.70, Probability 10

Open Date: 4/30/2020, Days Open: 4, Est. Close Date: 4/30/2020, Act. Close Date: []

Status: Open, Closed - Won, Closed - Lost, Inactive

Process/Stage: Process ACT1 Sales Cycle, Stage Initial Communication

Sage 50 Opportunity Statistics

Customer No: BELLWETHER, Company: Bellwether Garden Supply, Sales Rep: FARLEY, Martin L. Farley

Document: Number, Reference No, Type, Status, Terms, Source

Notes: Document Internal, Statement

Transaction No is populated after push.

Push Act Opportunity to Sage 50

Select Sales Order(s) that will be pushed

Search: Standard Filters (Status, Process, Stage), Search button, Use Current Lookup checked

Select	ID	Customer	Name	Status	Total	Open Date	Search Error
<input checked="" type="checkbox"/>	I	Margie We...		Open	\$717.00	4/30/2020	

Buttons: Cancel, Back, Next

Created Sage 50 Quote, SO or Invoice

Sales Order(s) pushed successfully

Push Results

ID	Selected Custom...	Name	Status	Open Date	Total	Operation	Push Re
I	Margie Weatherf...		Open	4/30/2020	717.00	Create	Success

Buttons: Cancel, Back, Finish

You can push current Act Opportunity to Sage 50.
Or, you can push current "Lookup" to Sage 50. Allowing you to push multiple transactions.

Act Opportunities

Sage 50 Transactions

Transactions are imported into Act as Opportunities.

As a transaction migrates from transaction type to new type, e.g. Quote to Sales Order to Invoice, the original Act Opportunity is updated and referenced.

If you pushed a Quote from Act to Sage 50, changes in Quote will update Act.

Specific fields in Act are populated referencing Sage transaction.

You can create dynamic groups based on the available statistics

Sage 50 Transactions Imported to Act Opportunity

The image shows two side-by-side screenshots of software interfaces. The left screenshot is titled 'Opportunity Statistics' and shows fields for Name (BELLWETHER <B2020>), Totals (Total: \$3,284.79, Weighted: \$1,478.16, Probability: 45), Days Open (Open Date: 4/15/2020, Days Open: 15, Est. Close Date: 4/30/2020, Act. Close Date: [blank]), Status (Open selected), Process/Stage (Process: Sage 50, Stage: Quote Open), and an Opportunity Item List. The right screenshot is titled 'Sage 50 Opportunity Statistics' and shows fields for Customer No (BELLWETHER), Company (Bellwether Garden Supply), Sales Rep, Sales Tax Code, Tax Rate, Total Tax (\$0.00), Document (Number: B2020, Reference No, Type: Quote, Status: 14 days old, Terms, Source: (701) Act Opportunity Quote), Date (4/15/2020), Expiration Date (4/30/2020), Amount (\$3,284.79), Cost (0), Profit (0), Ship Date, Ship Via, Margin (0), Customer PO, Disc Date, Freight Amt, Proposal No, Sales Order No, Sales Invoice No, and Notes (Document, Internal, Statement).

Act Opportunity Statistics

Sage 50 Opportunity Statistics

Quotes, Proposals, Sales Orders, & Invoices are imported into Act as opportunity. As a transaction migrates to another transaction type, import maintains the same opportunity with the new transaction level.

Quote > Sales Order > Invoice

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

Sage 50 Transactions Transaction Menu

DataPlus provides relational transaction menu for Customer, Vendor, & 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 Transactions Menu

The screenshot displays five panels of the Sage 50 Transactions Menu, each showing a list of transaction types:

- Sage 50 Customer:** Customer, Customer AR Aging, Customer AR Aging With Balance, Customer AR Outstanding, Customer AR Outstanding Full Month, Customer AR Outstanding Prior, Customer Bad Debt, Customer Contact, Customer Contact Associated, Customer Contact Associated Reference, Customer Contact Associated Reference (Customer...), Customer Credit Memo, Customer Credit Memo Year Current, Customer Credit Memo Year Prior, Customer Custom Fields, Customer Financial Information, Customer Information, Customer Invoice, Customer Invoice Filtered, Customer Invoice Month Current, Customer Invoice Month Prior, Customer Invoice Outstanding, Customer Invoice Past Due, Customer Invoice Recurring, Customer Invoice Unprinted.
- Sage 50 Vendor:** Customer Invoice Year Current, Customer Invoice Year Prior, Customer Item Sold, Customer Item Sold Filtered, Customer Item Sold Summary, Customer Item Sold Year Current, Customer Item Sold Year Prior, Customer Job, Customer Proposal, Customer Proposal Open, Customer Quote, Customer Quote Open, Customer Receipt, Customer Receipt Month Current, Customer Receipt Year Current, Customer Sales Order, Customer Sales Order Back Order, Customer Sales Order Open, Customer Sales Rep Commission, Customer Vendor Invoice, Time Ticket, Time Ticket Invoiced, Time Ticket Month Current, Time Ticket Month Prior.
- Sage 50 Vendor (continued):** Sage 50 Vendor, Sales Tax Authority, Sales Tax Authority Report, Vendor, Vendor Credit, Vendor Custom Fields, Vendor Invoice, Vendor Invoice Detail, Vendor Invoice Outstanding, Vendor Invoice Past Due, Vendor Invoice Waiting On Bill, Vendor Invoice Year Current, Vendor Invoice Year Prior, Vendor Item, Vendor Item Purchased, Vendor Job, Vendor Payment, Vendor Payment (Invoice No), Vendor Payment Detail, Vendor Payment Year Current, Vendor Payment Year Prior, Vendor Purchase Item, Vendor Purchase Item Year Current, Vendor Purchase Item Year Prior, Vendor Purchase Order, Vendor Purchase Order Open.
- Sage 50 Inventory:** Item, Item Active, Item Custom Fields, Item Serial Number Available, Item Serial Number In Progress, Item Serial Number Sold, Item Stock, Item Type.
- Sage 50 Prospect:** Prospect, Prospect Quote, Prospect Quotes Open.
- Sage 50 Job:** Inactive Job, Job, Job Active, Job Change Order, Job Change Order Not Approved, Job Estimate, Job Phase, Job Profitability, Job Profitability Summary, Job Time Ticket, Job Time Ticket Active, Job Time Ticket Month Current, Job Time Ticket Month Prior, Job Time Ticket Summary, Job Time Ticket Year Current, Job Time Ticket Year Prior.

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.

Relationship is based on related columns.

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

Sage 50 Transactions Menu

Relational transactions for contact are displayed in "DataPlus" Tab
Customer Invoice

Customer Number	BELLDISCOUNT	Sales Rep ID		Account No											
Contact Number	C-1	Sales Representative		Customer Ref No	BELLDISCOUNT										
Notes History Activities Opportunities Relationships Groups/Companies Documents Financial Info C / V Info Financial History Address Employee Status Web Info Social Updates Timeline DataPlus															
View: S50: Customer Invoice															
3 Records	Customer Number	Company	Period	Date	Due	Type	Status	Invoice No	Quote No	Proposal No	SO No	Amount	Paid	Balance	Custom
Drill Down	BELLDISCOUNT	Bellwether Discount Supplies	2020/03	03/15/2020	04/14/2020	Invoice	Past Due	313			15617	\$17,230.96	(\$1,818.81)	\$15,412.15	9014
Drill Down	BELLDISCOUNT	Bellwether Discount Supplies	2020/02	02/07/2020	03/09/2020	Invoice	Paid	307			15610	\$12,333.95	(\$12,333.95)		7876
Drill Down	BELLDISCOUNT	Bellwether Discount Supplies	2019/11	11/30/2019	12/30/2019	Invoice	Paid	259				\$6,089.82	(\$6,089.82)		

Click on "Drill Down" to show Customer Invoice Detail
Invoice Detail line items are displayed

History: S50: Customer Invoice Detail (Record No)													
9 Records	Quantity	Item	U/M	Description	Unit Price	Tax Type	Amount	Has SN	Item Type	SN	Job	Account ID	Account
Drill Down	3	EQFF-13120	Each	SBD-Gro All-Purpose Plastic Sprayer/Mister	\$199.80	0	\$599.40	No	DISTR			40000-EQ	Sales - Equipr
Drill Down	1	EQFF-13130	Each	SBD-Gro Hose-End Plastic Fertilizer Sprayer	\$647.50	0	\$647.50	No	DISTR			40000-EQ	Sales - Equipr
Drill Down	10	EQFF-13130	Each	SBD-Gro Hose-End Plastic Fertilizer Sprayer	\$12.95	0	\$129.50	No	DISTR			40000-EQ	Sales - Equipr
Drill Down	3	EQFF-13140	Each	SBD-Gro Soil Test Kit w/ Ph Probe and Core Sampler	\$399.80	0	\$1,199.40	No	DISTR			40000-EQ	Sales - Equipr

Click on "Drill Down" to Customer Receipt Detail
Receipt Details are listed for the related Invoice

History: S50: Customer Receipt Detail (Invoice No)												
2 Records	Invoice No	Credit No	Amount	Account ID	Account	Type	Record No	Customer Employee Number	Customer Sales Representative	Employee Number	Sales R	
Drill Down	307		\$12,333.95	11000-00	Accounts Receivable	Accounts Receivable	159					
Drill Down	307		(\$243.08)	49000-00	Sales Discounts	Income	159					

Click on "Drill Down" to show Customer Receipt

History: S50: Customer Receipt (Record No)													
1 Record	Date	Reference	Receipt No	Applied To	Amount	Account ID	Account	Method	CC Amount	CC Auth Code	Prepayment	Record No	Customer Employee Nu
Drill Down	02/16/2020	1593		307	\$12,090.87	10200-00	Regular Checking Account	Check	\$0.00		No	159	

Sage 50 Transactions Browse All Menu

DataPlus "Browse All" allows you lookup all transactions in Sage 50 & drilldown to related data.

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

Sage 50 Browse All Transactions Menu

View: S50: Customer

34 Records

Customer Number	Company	Contact	Address 1	Address 2	City	Province	Postal Code	Alternate Phone	Fax Phone	E-mail	Web
33	Ashburton Reinforcing	Steve Ashburton	12 Culb...		Richmond	British Colum...			(604) 555-9134	Ashburton@bc.ca	
	Customer Contracts (Customer Number)	Noel Mulrone...			Richmond	British Colum...				Askew@bc.ca	
	Customer Estimates (Customer Number)	Hugo C. Lamore...			Bayswater	British Colum...			(604) 555-3428	Bayswater@bc.ca	
	Customer Invoices (Customer Number)	Susan Hymn			Vancouver	British Colum...				Belvedere@bc.ca	
	Customer Job Sites (Customer Number)	Tyler Lincoln			New Westminster	British Colum...					
	Customer Receipts (Customer Number)	Helen Grano	123 Pimm...		West Vancouver	British Colum...			(604) 555-8945		
		Chris Eberhard...	8940 Burr...		Vancouver	British Colum...					

History: S50: Customer Invoices (Customer Number)

5 Records

Customer Number	Company	Contact	Transaction #	Invoice No	Period Lookup	Date	Date Due	Type	Subtotal	Freight	Sales Tax	Total	Amount Owing	Disc %	Days	Net Days	Message	
33	Ashburton Reinforcing	Steve Ashburton	403	17811	2015/02	2/28/2015	4/29/2015	Invoice	\$190.00			\$190.00	\$201.40		2	30	60	Thank you
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
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
33	Ashburton Reinforcing	Steve Ashburton	335	17800	2015/03	3/31/2015	5/30/2015	Invoice	\$200.00		\$13.80	\$213.80	\$213.80		2	30	60	Thank you
									\$47,490.00	\$0.00	\$6,270.60	\$53,760.60	\$53,760.60					

Lookup by Customer

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

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
Customer Number: 38																
Cavendish, Peter S.	Helen Grano	210	2015/03	3/31/2015		\$179.00		\$10.74	\$189.74	2	30	60		Cavendish, Peter S.	Helen Grano	123 Pimmerton
						\$179.00	\$0.00	\$10.74	\$189.74							
Customer Number: 40																
DAB Collision Ltd	Sukhi Dylan		2015	2/11/2015		\$179.00		\$23.27	\$202.27	2	30	60		DAB Collision Ltd	Sukhi Dylan	No 3 Road
DAB Collision Ltd	Sukhi Dylan		2015	3/3/2015		\$299.00		\$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							

History: 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
40	DAB Collision Ltd	Sukhi Dylan	208	2/28/2015	3/3/2015	H2520		100.00	Pound	Stocking	Nails: Wood	\$1.79	\$179.00		\$23.27	\$202.27	Sales: Hardware	Rumphy, Belinda
40	DAB Collision Ltd	Sukhi Dylan	208	2/28/2015	3/3/2015	F1020		2.00	Section	Stocking	Fence	\$60.00	\$120.00		\$38.87	\$135.60	Sales: Lumber	Rumphy, Belinda
												\$30.90	\$299.00	\$0.00	\$38.87	\$0.00		

Group by column

Totals columns

View: S50: Customer Items Sold

325 Records

Customer Number	Company	Contact	Transaction #	Period Lookup	Date	Item	Quantity	Unit	Description	Price	Amount	Sales Representative
33	Ashburton Reinforcing	Steve Ashburton	34	2015/07	7/19/2013	H1020	250.00	Each	Handles: Locking	\$25.00	\$6,250.00	
33	Ashburton Reinforcing	Steve Ashburton	34	2015/07	7/19/2013	H1030	250.00	Each	Handles: Passage	\$30.00	\$7,500.00	
35	Bayswater School Board	Hugo C. Lamore...	34	2015/07	7/23/2013	H2510	1150.00	Pound	Nails: Finish	\$2.72	\$3,128.00	
35	Bayswater School Board	Hugo C. Lamore...	34	2015/07	7/23/2013	L1010	100.00	Sheet	Plywood: 1/4"	\$23.65	\$2,365.00	
							134847.33			\$52,525.42	\$2,018,304.92	

History: 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	
35	Bayswater School Board	Hugo C. Lamore...	34	2015/07	7/23/2013	9/21/2013	Invoice	\$5,493.00		\$0.00	\$5,493.00	\$5,493.00		2	30	60	Thank you for v
								\$5,493.00	\$0.00	\$0.00	\$5,493.00	\$0.00					

Lookup every item sold & drill down to invoice.

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 in Act faster & more efficiently than within Sage 50.

DataPlus provides an all in one solution for your business.

Sage 50 Browse All Transactions Menu

The screenshot displays the Sage 50 DataPlus interface with several overlapping 'Browse All' windows. The main window shows customer details for 'BELLWETHER' and a list of transactions. Three callouts highlight specific data:

- Invoices:** A callout points to the 'S50: Customer Invoice' window, which shows a list of invoices for 'BELLWETHER'.
- Receipts:** A callout points to the 'S50: Customer Receipt' window, which shows a list of receipts for 'BELLWETHER'.
- Items Sold:** A callout points to the 'S50: Customer Item Sold' window, which shows a list of items sold for 'BELLWETHER'.

Customer Number	Company	Period	Date	Reference	Receipt No	Applied To	Amount	Account
BELLWETHER	Bellwether Garden Supply	2020/03	03/10/2020	8203		310		10200
BELLWETHER	Bellwether Garden Supply	2020/02	02/12/2020	8159				10200
BELLWETHER	Bellwether Garden Supply	2020/01	01/24/2020	8054				10200

Customer Number	Company	Period	Date	Invoice No	Credit No	Amount	Account ID	Account
BELLDISCOUNT	Bellwether Discount Supplies	2020/01	01/05/2020	259		\$6,089.82	11000-00	Accounts R
BELLDISCOUNT	Bellwether Discount Supplies	2020/01	01/05/2020	259		(\$121.78)	49000-00	Sales Disc

Date	Status	Invoice No	Customer PO	Item
13/12/2020	Paid	CM308	9014	EQLW-35200 6093
13/12/2020	Paid	CM308	9014	EQFF-13140 6679
13/12/2020	Paid	CM308	9014	EQFF-13120 589022

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, 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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