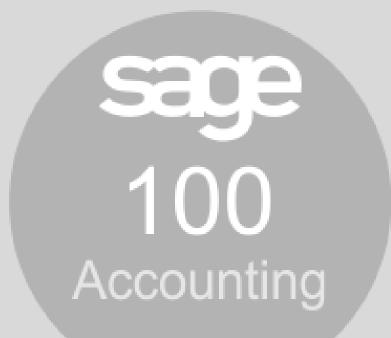


DataPlus Addon Software



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

DataPlus 4.0 Manage Permissions S100 Contact Push

- Customer
- Vendor
- Salesperson
 Allows or disallows Act
 user from creating entity
 from Act

Configuration For Contact Push

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

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

Configure Sage 100 Push for Customers – Vendors – Salespersons

P	Permissio	ons						Use	
N	View Per	missions	Misc Permission	Sales Represe	entatives				
		Name		Export	S100 Contac Push	:t	S 100 SO Push	View	
		Administr	ator	\checkmark	\checkmark		\checkmark	\checkmark	
		Manager		\checkmark	\checkmark		\checkmark	\checkmark	
ser Level		Standard		\checkmark	\checkmark				
Sei Levei		Restricte	d						
		Browse							
Sage 10 Conned		ection Sett		or Mapping Sale	esperson Mapping	Sales	a Order Mapping		
-0		y Settings							
	С	ompany C L	Code: ABC Jser: hoganda	a		Disal	ble Company Selec	tion: 🗹	
		Passv	vord:						

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

dp Sage 100 Configuration - Co	nfiguration - v1.0.*	Enable Push			-
Sage 100 Connection Settings				Mandatory Fields	
Connection Customer Mapping	Vendor Marging Salespers	on Mapping Sales O	order Mapping		
Customer Push Enabled:	3				
Mandatory Fields					
Customer No:	eCustomerID	*	reson No:	Salesperson No	
Division No.	eCustomerID	*	Common		
			Fields		
Common Fields					
	Company		Country Code:	Country	
Primary Contact Code			Telephone:	Phone	
Contact Name	Contact		Extension:	Extension	
Address 1	Address 1			Fax Phone	
Address 2	Address 2		E-mail Address:	E-mail	
Address 3	Address 3		Credit Hold:	AR Credit Hold	
City	City		URL Address:	Web Site	
State	State		Credit Limit:	AR Credit Limit	
Zip Code	Zip Code		Source:	Source	
			Us	er Defined	
User Defined Fields				Fields	
Source	:				

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
Ven	dor M	appi	ng	

dp Sage 100 Configuration - Con	figuration - v1.0.*	Enable Push			- C	x c
Sage 100 Connection Settings						
Connection Customer Mapping	Vendor Mapping	on Mapping Sales Or	der Mapping	Mandatory		
Vendor Field Mappings				Fields		
Vendor Push Enabled: 🔽						
Mandatory Fields						
Vendor No:	eVendorID	*	Division No:	eVendorID	*	
		Comn				
Common Fields		Them				
Name:			Zip:			
Primary Contact Code:			Country Code:	Country		
Primary Contact:	Contact		Telephone:	Phone		
Address 1:	Address 1		Extension:	Extension		
Address 2:	Address 2		Fax:	Fax Phone		
City:	City		E-mail Address:	E-mail		
State:	State		URL Address:	Web Site		
				an Define d		
				er Defined Fields		
Cancel					5	Save

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

-	figuration - v1.0.*	Enable Push			- C	ן
	Manda Manaina	Demon Manoing Color Onlor M		Mandatory		
	vendor Mapping	Sales Order In	viapping	Fields		
	FI					
resperson Fush Enabled.	$\mathbf{\Sigma}$					
Mandatory Fields						
Salesperson No:	eSalespersonID	*	Division No:	eSalespersonID	*	
		Common				
Common Fields		Fields				
Name:	Contact		Zip:	Zip Code		
Address 1:	Address 1		Country Code:	Country		
Address 2:	Address 2		Telephone:	Phone		
	1		E-mail Address:	, E-mail		
	,					
	Jointo					
			Us			
				Fields		
	person Field Mappings ilesperson Push Enabled: Mandatory Fields Salesperson No: Common Fields Name: Address 1: Address 2: City:	ction Customer Mapping Vendor Mapping person Field Mappings Mesperson Push Enabled: Mandatory Fields Salesperson No: eSalespersonID	0 Connection Settings etion Customer Mapping Vendor Mapping seles Order Mapping Sales Order Mappings elesperson Field Mappings elesperson Push Enabled: Mandatory Fields Salesperson No: eSalespersonID * Common Fields Name: Contact Address 1: Address 1 Address 2: Address 2 City: City	0 Connection Settings tion Customer Mapping Vendor Mapping Sales Order Mapping person Field Mappings Mesperson Push Enabled: Mandatory Fields Salesperson No: eSalespersonID * Division No: Common Fields Name: Contact Zip: Address 1: Address 1 Country Code: Address 2: Address 2 Telephone: City: City E-mail Address: State: State	0 Connection Settings tion Customer Mapping Vendor Mapping Sales Order Mapping Mandatory person Field Mappings lesperson Push Enabled: Mandatory Fields Salesperson No: eSalespersonID Division No: eSalespersonID Common Fields Name: Contact Address 1: Address 1 Address 2: Address 2 City: City State: State User Defined	0 Connection Settings tion Customer Mapping Vendor Mapping, Tousperson Mapping Sales Order Mapping Mandatory person Field Mappings lesperson Push Enabled: Mandatory Fields Salesperson No: eSalespersonID • Division No: eSalespersonID • Common Fields Name: Contact Zip: Zip Code Address 1: Address 1 Country Code: Country Address 2: Address 2 Country Code: Country Address 2: Address 2 Country Code: Country Country Code: Country Country Code: Email State: State User Defined

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

City:

State: TX

Zip Code: 76849

Push to Sage 100 Notice

Successfully saved Customer

OK

Back

Pus	h Act Co	ntact as	Cus	stome	er to	Sage 100
dp Push to Sage 100		- 🗆	×			
Push Contact						
Choose Sage 100 Entity		O Nothing Chosen				
O Ven Cre	ate a Customer in Sage100		•	When sam	/endor i ne Venc) Entity n Sage 100 lor is pushed again, the Vendor
Back		Review Pus	sh Info	ormation		
라 Push to Sage 100				_		
Push Contact Customer Data Mandatory Fields Customer No:	01-AdvEnv *	Salesperson No:	0200-Shelly West	land 💌 *	^	After push, the Customer ID is associated with Act
	Advanced Environmental F	Country: Phone:	(915) 446-3430	•		Contact & Sage 100 Customer.
			10101440-0400			eCustomerID 01-AdvEnv
	Joe G Brooks	Extension:]			
Address 1:		Fax Phone:	(915) 446-3864			
Address 2:		E-mail:				When you edit contact
Address 3:		Web Site:				Customer ID is used to

AR Credit Hold:

......

AR Credit Limit:

 \times

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

Customer successfully push to Sage 100

v

Next

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 to Sage 100 Push Contact Choose Sage100 Entity Choose Sa	e a Customer in Sage100 or e a Vendor in Sage100	- x	 Choose Sag Vendor Create a Vendor 	ge 100 endor ir e Vendo	Entity n Sage 100 or is pushed again,
Contact No:	01-BerMan * Beridge Manufacturing Co 01-BerMan-JBeridge Jack Beridge	View Push I	- C		After push, the Vendor ID is associated with Act Contact & Sage 100 Vendor. evendorD DI-BerMan When you edit contact Vendor ID is used to edit associated Vendor in Sage 100.
Back	Push to Sage 100 Notice	×		Next:	

ОК

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
며 Push to Sage 100	_			

Push Contact	
Choose Sage 100 Entity Customer Create a Customer in Sage 100 Vendor Create a Vendor in Sage 100 ® Salesperson Create a Salesperson in Sage 100	 Choose Sage 100 Entity Salesperson Create a Salesperson in Sage 100 When same Salesperson is pushed again, DataPlus will edit the Salesperson
Book	Next
Review	v Push Information
부 Push to Sage 100	– 🗆 ×
Push Contact Salesperson Data Mandatory Fields Salesperson No: 01-0800 Common Fields Contact: Peter Smith Address 1: 1271 West Ave Address 2: City: Mecca State: CA	After push, the Salesperson ID is associated with Act Contact & Sage 100 Salesperson. esalesperson D 01-0800 When you edit contact Salesperson ID is used to edit associated Salesperson ID is used to edit associated Salesperson in Sage 100.
Back Push to Sage 100 Notice ×	Next
Successfully saved Customer OK	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	n Act Field
2 Act! Premium - Sage100	- 0
File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Custom Tables Help	
Image: Section of the section of t	Warning Go
» 👤 Detail View 🧏 List View 🙌 🕅 12 of 62 🕅 🍽 💾 🗟 🤽 🐼 🆉 💡 dpS100-SF	notation
Primary WARNING: Customer data will be overwritten by Sage 100	
Customer No 01-ABF Sales Rep Jim Kentley ID/Status Customer V	Jage
Contact No C/V 01-ABF-ARTIE JOHN Salesperson No 01-0100 Type A2	
Employee No Contact Ref No 01-ABF Prospect Number	1 00
Vendor No Record Manager Jim Kentley Source Sage 100 V	
Company American Business F. Address 2131 N. 14th Street	ation Date Integrate
Contact Residential Suite 100	1/2000 U
Salut Title Office Manager V Accounting Department	st Update Sage 100
	4/2006 V with Act!
219 Fax State WI ZIP 53205-1204	mported
Are Read Free Phone County USA County USA	Yes USING
Only dpFolders E-mail artie@sace.sample.com	
Dr. FICE Web Site Www.abf.com Mand	datory Fields
Status V Rating Referred By V	

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

Act Fields:

- Green fields in Act are by default "Read Only" fields for all Act users except Act Administrators.
- Fields can be modified to "No Access" to allow you to protect specific information.
- Sage 100 custom fields can be created with first import to your existing database.

Act! Layout

- We provide an Act database for your convenience with all custom fields and layout for Company, Contact, Group & Opportunity levels.
- The layout can also be used as a template for your existing database. All you do is map your fields to layout fields.

Warning notation field lets you know that the current contact information is coming from Sage 100. Sage 100 wins!

Contact Financial History

Customer /Vendor / Salesperson

Detail View Primary Customer No Contact No C/N

Employee No

QUOTE

Quotes

Count

Amount

New

Open

Hold

- 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

	Sag	e 10	0 Financ	ial H	Istory In	n Act	Field	k
ew	上 List View 🔣 🕅 12 o	f 62 🕅 🔛 🖺	🗟 🗷 🐼 🦄 🖉 👍S	100-SF	💌 💠 dpHistory			
		WARNI	NG: Customer data will be overwritten by	/Sage 100				
D	01-ABF	Sales Rep	Jim Kentley	ID/Status	Customer 🗸	DATAPLUS	Sage	
/v	01-ABF-ARTIE JOHN	Salesperson No	01-0100	Туре	A2 🗸			
		Contact Ref No	01-ABF	Prospect Number			100	
		Record Manager	Jim Kentlev	Source	Sage 100			

Vendor No Notes History Activities Opportunities Relationships Groups/Companies Documents Financial Info Financial History sperson Address Status Web Info Social Updates DataPlus dpFolders Timeline CUSTOMER FINANCIAL HISTORY INVOICE/SALES + PURCHASE HISTORY Jan Feb Mar May Jun Jul Aug Sep Oct Nov Dec Total Year Apr \$407.40 \$1,113.05 \$3,191.72 \$4,712.17 2020 Prior Total Prior YTD Current YTD Difference Total Invoice Date % 10 3/1/2020 ~ Count First \$4,712.17 5/31/2020 ~ Total \$0.00 Last ORDER HISTORY Feb Mar Jul Oct Year Jan Apr May Jun Aug Sep Nov Dec Total 2020 \$8,306.54 \$8,306.54

Financial History custom fields are shared between Customer,

JOB STATISTICS

Status

Rev Est

Rev Contract

% Complete

JTD Cost

JTD Billed

JTD Receipt

Jobs

Open

Hold

Bid

Vendor and Salespersons from Sage 100.

ORDER STATISTICS

New

3

Open

8,306.54

Hold

Orders

Count

Amount

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
- Туре
- Vendor Notes

		WARNI	NG: Customer data will be or	verwritten by Sag	e 100							
Sustomer No	01-ABF	Sales Rep	Jim Kentley	ID	/Status	Custom	ner	~	DATAPLUS	Sage		
ontact No C/V	01-ABF-ARTIE JOHN	Salesperson No	01-0100	Ту	be	A2		~				
nployee No		Contact Ref No	01-ABF	Pro	spect Number					100		
endor No		Record Manager	Jim Kentley	▼ So	urce	Sage 1	00	\sim				
lotes History	Activities Opportunities Relat	ionships Groups/Comp	oanies Do ranie Finan	cial Info Financ	ial History Emp/S	Salesperso	on Address	Status Web In	nfo Social Update	es DataPlus dpF	olders Timeline	
				CUSTOMER F	INANCIAL INFO	RMATION	4					
ACCOUNTS R	ECEIVABLE INFORMATION			AGING								
Date Establishe	d 1/1/2019 V	Discount Rate		Invoice	As Of	G	urrent	30	31 - 60	61 - 90	90 +	Total Due
Default Item Co	de WIDGET (8" x 10" W 🗸	Fin Charge Rate	1.500	Amt	5/31/2020	~	\$3,252.38	\$1,222.58	\$1,257.40			\$5,732.36
Default Pymt Ty		Last Fin Charge Dat	te 4/30/2020 🗸		Overdue T	o Pay	CR Hold	CR Limit	Unpaid Fin	Open Ord Amt	Cr Limit Over	Highest Bal
	ivity 5/31/2020 🗸			Avg Days		4		\$120,000.00	\$43.89	\$8,422.64		\$5,732.3
AR Price Level	1 ~			Avg Days				Terms Code			Batch Fax	
AR Price Level Last Pymt Amou Last Pymt Date Terms Code Primary Ship To Ship Code	unt \$864.25 5/31/2020 ✓ 01-Net 30 Days 2-American Business Fut UPS BLUE	Last Stmt Date Tax Exempt No Tax Schedule Sort Location Code	5/31/2020 V WI MILMIL AMER V	Last Chec Last Purch Last Payn AP Balanc Default B	ase Date ent Date e Due px No		~	Taxpayer ID No Tax Schedul Refere	Every ite	em	Credit Cai Exemptio Hold Payr Misc Box Separate	rd Vendor n No On File nent 9 Check
Last Pymt Amou Last Pymt Date Terms Code Primary Ship To Ship Code	unt \$864.25 5/31/2020 ✓ 01-Net 30 Days 2-American Business Fut	Tax Exempt No Tax Schedule Sort	WI MILMIL AMER	Last Chec Last Purch Last Payn AP Balanc Default Bi Default Fi	e Due orm		~	Taxpayer ID No Tax Schedul Refere So	Every it Custom	em her	Credit Cai Exemptio Hold Payr Misc Box Separate Temporar	d Vendor n No On File nent 9 Check y Vendor
Last Pymt Amou Last Pymt Date Terms Code Primary Ship To Ship Code	unt \$864.25 5/31/2020 ✓ 01-Net 30 Days 2-American Business Fut UPS BLUE	Tax Exempt No Tax Schedule Sort	WI MILMIL AMER	Last Chec Last Purch Last Payn AP Baland Default B Default Fo GL Accou	e Due ormonia de la companya de la compa enter de la companya de l		~	Taxpayer ID No Tax Schedul Refere So	Every ite Custom purchase	em ner ed is	Credit Cai Exemptio Hold Payr Misc Box Separate	d Vendor n No On File nent 9 Check y Vendor
Last Pymt Amou Last Pymt Date Terms Code Primary Ship To Ship Code	unt \$864.25 5/31/2020 ✓ 01-Net 30 Days 2-American Business Fut UPS BLUE	Tax Exempt No Tax Schedule Sort	WI MILMIL AMER	Last Chec Last Purch Last Payn AP Balanc Default Bi Default Fi	e Due ormonia de la companya de la compa enter de la companya de l		~	Taxpayer ID No Tax Schedul Refere So	Every it Custom	em ner ed is	Credit Cai Exemptio Hold Payr Misc Box Separate Temporar	d Vendor n No On File nent 9 Check y Vendor
Last Pymt Amou Last Pymt Date Terms Code Primary Ship To Ship Code	Int \$864.25 5/31/2020 V 01-Net 30 Days 2-American Business Fut UPS BLUE	Tax Exempt No Tax Schedule Sort	WI MILMIL AMER	Last Chec Last Purch Last Payn AP Baland Default B Default Fo GL Accou	e Due ormonia de la companya de la compa enter de la companya de l		~	Taxpayer ID N Tax Schedul Refere	Every ite Custom purchase	em her ed is nd	Credit Cai Exemptio Hold Payr Misc Box Separate Temporar	d Vendor n No On File nent 9 Check y Vendor

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.

Contact Addresses

Sage 100 Additional Address Fields

Billing Address

Shipping Address

Employee Address

Primary		WARNI	NG: Cus	stomer data will be	overwritten by	Sage 100						_			
Customer No	01-ABF	Sales Rep	Jim Ke	entley		ID/Status		Customer		×	TAPLUS	Sad	e		
Contact No C/V	01-ABF-ARTIE JOHN	Salesperson No	01-010	00		Туре		A2				Sag 100	_		
Employee No		Contact Ref No	01-ABI	F		Prospect Numb	er					100	J		
Vendor No		Record Manager	Jim Ke	entley	•	Source		Sage 100		\sim					
Notes History	Activities Opportunities Relat	tionships Groups/Comp	oanies	Documents Fina	ncial Info Fi	nancial History	Emp/Sa	Address St	tatu	is Web Info So	cial Updates	DataPlus d	dpFolder	s Timeline	
PRIMARY CON	TACT ADDRESS			CUSTOMER S	HIP TO ADD	RESS				HOME ADDRES	55				
														-	
Address	2131 E. 14th Street Suite 100			Address	5411 Kendri				Ш	Address					
	Accounting Department				5411 Kenun				Ш	City					
City	New Berlin			City	Racine				Ш	State			~ ZI		Ľ
State		ZIP 53151		State	WI		ZIP	53120	Ш	Country				.r	
Country	USA	55151		Country	USA		211	33120	Ш	Phone			-		
Phone		Ext 219		Phone	(414) 555-4	319	Ext		Ш	Spouse					
Alt Phone	· ·	Ext 219		Alt Phone	(11) 555		Ext		Ш	E-mail					
Fax	(414) 555-4512		-1	Fax					Ш	-					
E-mail	artie@sage.sample.com			E-mail					Ш						
Notes	Call between 9:00am and 5:00p	m, Monday through			L				Ш						
	Friday.	· · · ·		Code	2-American	Business Futu			Ш						
				Company	American Bu	siness Futures									
				Contact No	JOHN QUIN	N									
			~	Contact	John Quinn										

Contact Employee

Employee Information

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

Employee Notes

	Sage 100 Employee Information
- 0	O Act! Premium - Sage100 —
	File Edit View Lookup Contacts Schedule Write Reports Tools Emarketing Custom Tables Help
Go	Image: Search Imag
	X Detail View & List View K K K 8068 H H C 34 0 0 0 000-5F 0 0 0 0 0 000-5F Contact No C/V Salesperson No 01-0200 Type Employee No Contact Ref No Record Manager Shelly Westland Source Sage 100 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
oose to sperson t and set evel s to "No protect	Notes History Activities Opportunities Relationships Groups/Companies Documents Financial Info Financial History Emp/Salesperson Status Web Info Social Updates DataPlus defailes Timelie SALES REPRESENTATIVE INFORMATION EMPLOYEE INFORMATION PR Status 6 8.00 File Date / Comment V You can choose to import Salesperson data into Act and set field level Salesperson Mgr Division Salesperson Mgr Division Marital Status Gender Birth Date File Date / Comment EMPLOYEE TAX INFORMATION Labor Primary State Autopay Hours Pay Rate 1 Pay Rate 2 Elc Elc Access?" to protect W/C Code Dependent Exemptions Enefit Sul State Elc Elc Labor Elc Labor Elc Labor Labor Pay Rate 1 Pay Rate 2 Elc Labor Labor Labor Labor Labor Elc Labor Labor Labor Labor Labor Labor Labor
s to " prote	EMPLOYEE TAX INFORMATION Labor permissions to " Tax Status Federal State Primary State Pay Rate 1 Filing Status W/C Code Pay Method Pay Rate 2 EIC Access" to protect the information Dependent Exemptions Override Tax Calc Override Tax Calc SUI State EIC EIC

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.

Contact Status Sage 100 ID's

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

DataPlus Help Links

			Sa	age	100		t Unig		S	
🔔 Detail View	ᆚ List	t View 🔣 🕅 12 a	of 62 🕅 🔛 🖺	🗟 🗶 🖄 🕹	🕈 🖉 💡 🚺 dpS	100-SF	💽 🕴 ф арн	listory		
Primary			WARN	NG: Customer data	will be overwritten by	y Sage 100				
Customer No	01-ABF		Sales Rep	Jim Kentley		ID/Status	Customer	V DATAP	Sag	le
Contact No C/V	01-ABF-/	ARTIE JOHN	Salesperson No	01-0100		Туре	A2	✓	-	
imployee No			Contact Ref No	01-ABF		Prospect Numbe	r		J 10	0
/endor No			Record Manager	Jim Kentley	•	Source	Sage 100	\sim		
Notes History	Activities	Opportunities Relati	onships Groups/Com	panies Documents	Financial Info F	inancial History Er	np/Salesperson Address Si	tatus Web Info Social	Updates DataPlus	dpFolders Timeline
Record Creator	r Adm	in	Last Meeting		~	Access Level				
Create Date	10/2	2/2018 🗸	Last Reach		~	Public				
Last Edited by	Adm	in	Last Attempt		~	0.01				
Edit Date	10/2	2/2018 🗸	Letter Date		~	O Private			Unic	ue ID's are
Birth Date		~	Last E-mail		\sim	Limited A	cess Select Users/Team	s		ed to map
Sage 100 ERP	ID'S									
							-		cont	tact in Sage
eCustomerD		01-ABF			DAT	APLU	S V4.0.04	4092016	50) with Act
eLocationD eContactD		01-ABF			DataPlus Knowle	D/ HOGAN DATA	ttp://kb.hogandata.com			
eContactID		01-ABF-ARTIE JOHN 01-ABF			Online Support		ttp://kb.nogandata.com			ontact or
eEmployeeD	ICEED	01-ADI			Help Desk		ttp://helpdesk.hogandata.com		C	ompany.
eSalespersonD					Client Portal		ttp://hogandata.com/clients	<u>.</u>		
eVendorD					ACTeStore.com		ttp://ACTeStore.com			
S100 Last Updat	e	10/2/2018 6:29 AM	~		Sign up for Act!		ttp://www.swiftpage.com			
eActContactID					Come	100				
Application Com	pany	01-ABC / ABC Distribut	tion and Service Corp.		Sage 1	100				
		EXTEND a			Sage 100 Web S Sage Customer F		ttp://na.sage.com/us/erp/sag ttp://na.sage.com/us/log-on	<u>e-100-erp</u>		
		DataPlus	s cloud							

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.

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

Item List						• 🖸 <mark>• X</mark> •							
Item Code	Description		Prod	Procure	Vendor	No. 🔺 📉							
001-HON-H252	HON 2 DRAWER L		K WF&A	Buy	01-CON	T E					/	Sage 1	100
1001-HON-H252LK	HON 2 DRAWER L			Buy	01-CON								
1001-HON-H254 1001-HON-H254LK	HON 4 DRAWER L HON 4 DRAWER L			Buy Buy	01-CON 01-CON							Item l	List
2480-8-50	DESK FILE 8" CAP	50	FD&A	Buy	01-UNI1					,	\rangle		
2481-5-50	DESK FILE 51/4" (FD&A	Buy	01-UNI1								
2551-3-50 2568-3-25	DESK FILE 3 1/2" (DESK FILE 3 1/2" (FD&A FD&A	Buy Buy	01-UNI1 01-UNI1								
4886-18-14-3	PAPER CADDY 18'	'W 14''D 3''H	PS&A	Buy	01-CON	IT							
6650-26-16-11	SOUND CVR 26'W		PS&A	Buy	01-CON								
6652-28-24-15 6655	SOUND CVR 28'W PRINTER STAND \		PS&A PS&A	Buy Buy	01-CON 01-CON								
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Manage Product Lis Inter product list items: Name AB SVITCH - 25-PIN AM/FM/STEREO AM/FM/STEREO/CASS	Item Number BB1850 AM/FM STEREO E STEREO/CD PCK	\$0.0000 \$300.0000 \$1,000.0000	\$0.0000 \$600.0000 \$2,800.0000	0		<u>A</u> dd Delete						Setting Sage 1	s for 100
Manage Product Lis inter product list items: Name BSWITCH - 25-PIN MMFM/STEREO AM/FM/STEREO/CASS ART SPECIALTY BROI	Item Number BB1850 AM/FM STEREO E STEREO/CD PCK IZ ARS-9301	\$0.0000 \$300.0000	\$0.0000 \$600.0000	0		<u>A</u> dd Delete						Setting Sage 1	s for 100
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	Item Number BB1850 AM/FM STEREO E STEREO/CD PCK IZ ARS-9301 C/ ARS-9401 E ARS-9201 IL ARS-9101	\$0.0000 \$300.0000 \$1,000.0000 \$58.1600 \$64.7500 \$47.4500 \$44.5000	\$0.0000 \$600.0000 \$2,800.0000 \$119.9500 \$129.9500 \$94.9500	0		<u>A</u> dd Delete	View: S	100: A	Act Opportunity Settings Item	s		Setting Sage 1	s for 100
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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.

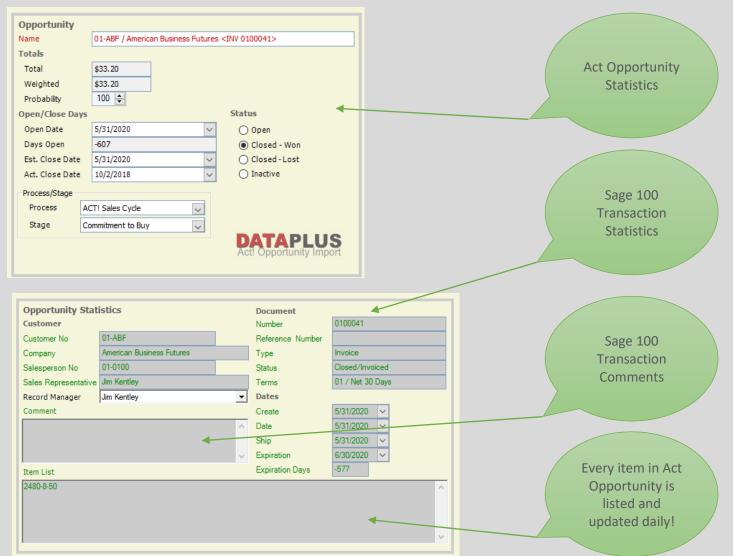
Sage 100 Item List Imported to Act Product List

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



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

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

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Sage 100 Transactions Menu

Browse All

Customer Sales Order Repeating – Drill down to details

Customer Sales
Orders – Drill down to
details

Drill Down 02-CUSTOM

Drill Down 02-AUTOCR

Drill Down
 01-BRESLIN

1 Record

Custom Craft Products

Autocraft Accessories

Breslin Parts Supply 0000152

History: 🕢 S100: Customer Sales Order Detail (Order No)

Company

Customer No

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0000157

0000158

Period

Order No

2020/05 5/15/2020

Promise Date

5/11/2020

Order Date

2020/05 5/11/2020

2020/05 5/15/2020

Standard

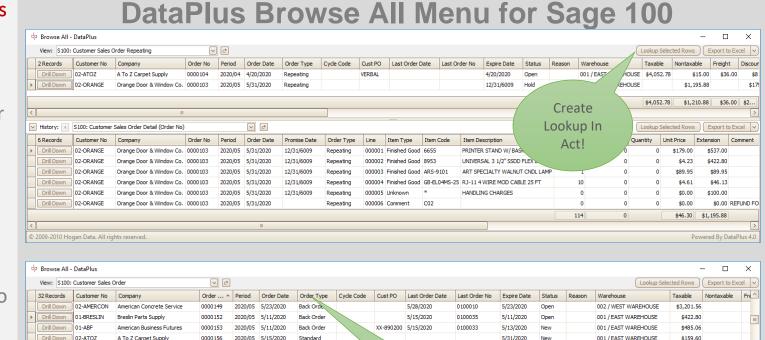
Standard

Order Type Line

Back Order

Iten

000001 Finished



\$777.00

\$1,800.00

Extension

\$422.80

\$422,80

Lookup Selected Rows

\$4.23

\$4.23

Unit Price

\$59,732.14 \$291,834.09

Export to Excel

Commi

Yes

Comment

Powered By DataPlus 4.0

001 / FAST WAREHOUSE

001 / EAST WAREHOUSE

0

5/31/2020

5/31/2020

SSDD FLEX DSK

Sort By

Any

Column

New

New

100

100

Ordered Back Ordered Quantity

100

100

Customer Invoices – Drill down to Sales Orders

	View: S100: Customer Invoice 👽 🕑															Loc	kup Selected I	Rows	port to Excel
19 Records	Customer No	Company		Invoice No	Туре	Source	Posted	Period	Date	Order No	Ship To		Source Journa	Taxable	NonTaxable	Freight	Sales Tax	Discount	Invoice Total
Drill Down	01-BRESLIN	Breslin Parts Supply	(0100035	Invoice	S/O	Trans	2020/05	5/15/2020	0000152	Breslin Parts Supply			\$132.50		\$10.00	\$6.63		\$149.1
Drill Down	01-BRESLIN	Breslin Parts Supply		0100040	Invoice	S/O	Yes	2020/05		1	Breslin Parts Supply		SO-000001	\$9,130.25		\$10.00	\$456.51		\$9,596.7
Drill Down	01-BRESLIN	Breslin Parts Supply	(0100044	Invoice	A/R	Yes	2020/05	5/21/2020		Cupply		AR-000004	\$572.50		-	\$28.63		\$1,646.1
Drill Down					Invoice	A/R	Yes	2020/05	5/6/2020		Inactive Cost		000005	\$27			\$17.95		\$324.2
Drill Down	·		(0100045	Invoice	S/O	Yes	2020/05	5/31/2020	0000166	Shepard Motorworks				Filter	By			\$283,500.0
Drill Down	02-CUSTOM	Custom Craft Products	; (0100037	Invoice	S/O	Yes 2	2020/05	5/15/2020	0000146	Custom Craft Product	ts		_	٨٣		.46	\$160.11	\$1,560.3
Drill Down	102-CREVING	Greater Alarm Compan	w (0100046	Invoice	s/0	Vec '	0020/05	5/31/2020	0000167	Greater Alarm Compa	anv.	s0-00003	-	An	У	73 .47	¢137.43	6975 C
1														\$1	Colur	nn	.4/	\$305.50	\$304,628.89
]															corar				
History: 📧	S100: Custome	r Sales Order (Order No)			-]											up Selected I	Rows	port to Excel
1 Record	Customer No	Company	Order No	Period	Order Date	Order Type	Cycle Co	de Cus	st PO Li	ast Order Date	Last Order No	Expire Date	Status	Reason War	ehouse	Taxabl	e Nontaxa	ble Freigh	t Discount
Drill Down	01-SHEPARD	Shepard Motorworks	0000166	2020/05	5/30/2020			223	13 1/	/1/1900		1/1/1900	Closed	001	EAST WAREHOU	ISE	\$283,5	00.00	
Dril Down 01-SHEPARD Shepard Motorworks 0000166 2020/05 5/30/2020 2233 1/1/1900 I/1/1900 Closed 001 / EAST WAREHOUSE \$283,500.00																			
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	\$0.00 \$233,500.00 \$0.00 \$0.00																		

Sage 100 **Transactions Menu Transaction Menu**

Customer

Customer Invoice

Customer Contact Associated

Customer Invoice Deleted

Customer Invoice History

Customer Invoice Open

Customer Invoice Repetitive

Customer Invoice Year Prior Customer Invoice Year Prior YTD

Customer Items Sold

Customer Invoice Year Current

Customer Items Sold Month Current

Customer Items Sold Month Prior

Customer Items Sold Top

Customer Items Sold Top YTD

Customer Items Sold Year Prior

Customer Items Sold Year Current

Customer Contact Associated - CRN

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.

Sag	e 10	0 Trans	actions
Customer			
Company Customer			
Customer			
Customer Auto Increment No		Salesperson	
Customer Contact		Salesperson	

Customer Level

Customer Memo

Customer Ouote

Customer Quote Open

Customer Sales Order

Customer Payment

Customer Payment Year Current

Customer Sales History By Period

Customer Sales Order Back Order

Customer Sales Order Hold Customer Sales Order New

Customer Sales Order Open

Customer Sales Order Repeating Customer Sales Order Year Current

Customer Sales Order Year Prior

Customer Ship To Address

Customer Ship To

Customer Payment Year Prior

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

> n mer Inventory Lot/Serial Vendor

Inactive Inactive Customer Inactive Vendor

Vendor

Vendor

Company Vendor

Vendor Contact

Vendor Invoice

Vendor Item

Vendor Memo

Vendor Payment

Vendor Remit To

Vendor Purchase Address

Vendor Purchase By Period

Vendor Purchase Order

Vendor Invoice Open

Vendor Contact Associated

Ξ	Inventory
	Inventory Item
	Inventory Item History
	Inventory Item Quantity
	Inventory Item Transaction
	Inventory Item Warehouse
	Inventory Lot/Serial
	Inventory Lot/Serial Custon

Inventory Sales Order Line Items

Menu

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

	stomer Na (p) 📄 15000	0-933272658		esentative		•	QB Company Account Nu		ock Castle Con	struction		DATAPLUS	QD		L'Bo	
	ployee No ployee Acct	No		Sales Rep / Record Ma	-	Admin	▼ ▼	Prospect Nur	_	-431		-u			Quic	.KDU	OKS.
	ndor No			ID/Status	-					uickbooks					÷ .		
No	tes History	Activities	Opportunitie	es Relationships	Groups/Compa	nies Documents F	inancial History	C / V Info Ad	ddress En	nployee Stat	us Web Info	Social Upda	ates Time	line DataPlu	S QBRep	oorts	
Notes History Activities Opportunities Relationships Groups/Companies Documents Financial History C / V Info Address Employee Status Web Info Social Updates Timeline DataPlus QBReports View: Q8: Customer Estimate C? Browse All Export to Excert Export to Excert														ort to Excel			
	3 Records	Custome	r Number	Company	Full Name		IsActive	Estimate #	Period	Date	Due Date	Subtotal	Tax	Total	Class	Memo	Sales Repres
Þ	Drill Down	150000-9	33272658		Abercrombie,	Kristy:Kitchen	No	289	2015/12	12/1/2015	12/31/2016	\$4,792.00	\$227.08	\$5,019.08	Remodel		
	Drill Down	150000-9	33272658	Kristy Abercrombie	Abercrombie,	Kristy:Remodel Bathr	oom 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 Bat						oom 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: Cust	omer Estimate D	Detail (Estin	nate #)		Image: A start of the start									Export to Excel 🗸
	8 Records	Active	Estimate #	Period	Date	Due Date	Туре	Item	Description	Qty	Cost	Amount	Markup	Total	Class	Sales Representative
۲	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)				d	•								Export to E	Excel 🗸
1 Record	Туре	Description	Subitem of	Parent	Amount	Percent	Account	UM	Assembly	Cost	Purchase Desc	Expense Acct	COGS	Vendor Ni	
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

	Browse All - Da	taPlus																□ <u> </u>
Г	View: QB: Cust	tomer		~ 2	1										Look	up Selected Rows	Export	to Excel 🗸
	64 Records 0	Customer Number	Name		Company			Contact		Address 1				A	ddea	City	State	Zip Coc
	Drill Dow	Customer Balances	(Customer Number)					ety Abe	ercrombie	Kristy Aber	-					Bayshore	CA	94326 =
	Drill Dow								ərd	Robert	Clic	k "I c	ookup			Millbrae	CA	94030
	Drill Dow	Customer Check (C			ck	Lo	okup	bv	ck	Bab			•		3 Samson	Dr. Millbrae	CA	94030
ŀ	Drill Dow		ns (Customer Numbe				' Iston			B	Select	ted R	lows"	to		Bayshore	CA	94326
	Drill Dow		emos (Customer Nun			Cu	iston	ier			look	un c	urren	t		Bayshore	CA	94326
⊩	Drill Dow		emos Open (Custome					4	rley							Middlefiel		94471
⊩	Drill Dow	Customer Estimate	(Customer Number)					Rafal Bolir		Ra	Cust	ome	rs tha	t		Bayshore East Bays	CA	94326 94327
t	Drill Dow	Customer Invoice (0	Customer Number) 🔪					Sonya Bris		Sonya	are h	nighli	ighted	1.	/	Bayshore	CA	94327
⊩	Drill Dow	Customer Invoice O	Open (Customer Num	iber)				Jason Bur		Jason Buro	arer				·	Bayshore	CA	94326
	Drill Dow	Customer Invoice O	Over Due (Customer N	Jumber)						Heather Camp	ober			are Rd.		Millbrae	CA	94030
F		Customer Payment	s (Customer Number)	0														
ľ	History:	Customer Sales Ord	lers (Customer Numb	per)			D	rill do	wn							up Selected Rows	C Furnant	ta Frank
r C		Customer Sales Ord	lers Open (Customer	Number)				by								-		to Excel 🗸
⊩	5 Records	Customer Sales Ord	lers Year Current (Cus	stomer Number	.) (I					Date	Due Date 2018-03-03		Subtotal		Amount		ance Paid	d Sales R
F	Drill Dow	Customer Sales Ord	lers Year Prior (Custor	mer Number)	Room		tra	ansact	ion		2018-03-03	53 -73	\$4,792.00 \$1.237.00	\$227.08 \$55.78	\$5,019.08 \$1,292.78		Yes	
⊩	Drill Dow		nding (Customer Num		Room	10	4				2018-07-07	-73	(\$37.20)	\$37.20	\$1,292.78		Yes	
⊩	Drill Dow		eipts (Customer Num			room 108				017/20 2017-00-07		-244	\$2,887.50	\$223.78	\$3,111.28		Yes	
	Drill Dow		ion List (Customer Nu		el Bath				-		2019-01-09	-259	\$4,522.00		\$4,522.00		Yes	
		Job (Customer Num																
		Job Estimates (Cust										-119	\$13,401.30	\$543.84	\$13,945.14		\$0.00	
Ľ	2009-2010		(Customer Number)														owered By [>
ſ	_	ustomer Sales Receip															elected Row	vs Exp
H	14 Records	Name		ompany Sale				Due Date	Pay Method					tal Amount		resentative		
iii)	Drill Dow		risty:Family Room	3004				10/25/2018		3674	\$1,017.		\$50.38	\$1,067.88		_/		
H	- Dell Deur	A Descreamber &	risty:Fa		2017	//10 10/	30/2017	10/30/2018		305	\$743.		\$0.00	\$743.75		_	Totals	5
											\$1,761.	.25	\$50.38	\$1,811.63	3		olumr	าร
	_	r Number: 1D0000		Grou	p by											U	oranni	.5
	Drill Dow			colu	mn			10/27/2018		6354	\$437.		\$0.00	\$437.50		\rightarrow		
	Drill Dow	n Ecker Designs:C	Iffice Repairs	colu		11/	29/2017	11/29/2018		574	\$3,150.		\$0.00	\$3,150.00			.Eo-555702	165
											\$3,587.	.50	\$0.00	\$3,587.50				
	_	r Number: 240000-																
	Drill Dow	n Natiello, Ernesto	o:Kitchen	3003	3 2017	7/10 10/	15/2017	10/15/2018	Check	7854	\$717.	.50	\$0.00	\$717.50			D7-933290	769
											\$717.	.50	\$0.00	\$717.50				
											\$7,771.	.25	\$58.03	\$7,829.28	3			
1	✓ History: ◀	QB: Customer Sales	Receipts (Sale No)				÷									Lookup S	elected Row	vs Exp
ſ	3 Records	Customer Number	Name		Company	Sale No	Item	Descripti	on			Qt	y Rate	Amount	Tax S	Gales Represent	tive Txr	nID
	Drill Down	150000-933272658	Abercrombie, Krist	ty:Family Room		3004		Removal	labor - cleane	ed up backyard in p	reparation for	deck 6	5.50 35.00	\$227.5	i0 Non		58F	-93335543
	Drill Down	150000-933272658	Abercrombie, Krist	ty:Family Room		3004		Installatio	on labor - inst	talled new deck		4	4.00 35.00	\$140.0	0 Non		58F	-93335543
	Drill Down	150000-933272658	Abercrombie, Krist	ty:Family Room		3004		Decking lu	umber	_				\$650.0	0 Tax		58F	-93335543
d	Browse All - Dat	taPlus					_											X
		omer Items Sold Year P	Prior							7 10	okup e	verv	item	sold	Looku	p Selected Rows	Export to	o Excel 🔍
C		Customer Number	Company		Contact										F	Quantity	Rate	Amour ^
	Drill Dov		Company	-	Sonya Bristol		2017/2	20 2017 0		b	y total,	, curi	rent y	ear		Quantity	\$35.0	
ŀ		Customer (Customer	Number)		Sonya Bristol			20 2017-01-	04 1018		or prio	r vea	ir & di	rill	le	r	\$35.0	
-	Drill Dov			5														
-	Drill Dov	Customer Invoice (In	voice #)	5												4,34		4 \$4 🗸
		Customer Invoice (In Customer Invoice Det		5							down					4,34		4 \$4 ~ >

Sage 100 Transactions Browse All Browse All Menu

DataPlus allows you to deep dive into multiple instances of "Browse All".

You can have as many "Browse All" instances you need.

DataPlus allows data mining Sage 100 in Act faster & more efficiently than within Sage 100.

DataPlus provides an all in one solution for your business.

Sage 100 Browse All Transactions Menu

				-								DATAPLUS				_
Customer Nc (p) 📄 800000 Employee No	C1-1182058777	Sales Represei Sales Rep Assi		dp	Browse All -	DataPlu	s					n		0		23
imployee Acct No		Record Manag	-	Admin	View: QB:	Customer	Sales Orders	1			2	Lo	okup Sela		toE	xcel
/endor No		ID/Status			4 Records	Custor	ner Number	Name			Company			Sales		Su
					Drill Down	150000)-933272658	Abercrombie	, Kristy:Famil	y Room		2017/0	06			\$
Notes History Activities (ips/Compar	nies D	Drill Down	6F0000	0-107151064	6 Morgenthaler	r, Jenny:Roo	m Additior	1	2017/1	12	Order	'S	
View: QB: Customer Iter	ms Sold Year Prio	r			Drill Down	52000	0-107152439	9 Roche, Diarm	nuid:Room ad	ldition		2017/1	10 10,		1	
4 Records Customer Drill Down 800000C1-	Number	dp Browse All - [Dat Plus	_	-			and suspenses and	and the second	-		-	- 0	x	18 7002	\$
	-1182058777	View: QB	ustomer Inv	voice			\checkmark	2		Loc	kup Selected	Rows	Export to Ex	xcel 🗸		
Drill Down 800000C1-	1182058777	118 R# /ds	Customer	Number	Company			▲ Full Nam.					Invoice #	Esti ^		
Drill Down 800000C1-	-1182058777	Down	1D0000-9	33272658	Ecker Desig	ins		Ecker Designs	s:Office	ing					_	
		prill Down	1D0000-9	33272658	Ecker Desig	·		Ecker Designs	s:Office Expa	insion						
	/	Drill Down	220000-93		Floss 'N Go		re	Melton, John				Inv	voices		Export to E	xcel
		Drill Down	150000-93		Kristy Aber			Abercrombie,				IIIV	oices		SO No	Туре
History: 🕢 QB: Custon	ner I Det	Drill Down	150000-93	33272658	Kristy Aber	crombie		Abercrombie,	Kristy:Remo	del Bathro	om				7003	Inve
4 Records Customer															7003	Inve
▶ Drill	32058777	<												>		
	58777	- History:	QB: Custor	mer Invoice I	Details (TxnID)		\checkmark	¢	Loc	kup Selected	Rows	Export to Ex	xcel 🗸		
ltems	1777	4 Records	Period	Date	Invoice #	Туре	Item	Description	Quantity	Rate	Amount	Tax	TxnID			
Sold	8777	Drill Down	2017/20	2017-01-16	1020	Service	Floor Plans	Floor plans	20.00	150.00	\$3,000.00		9D45-118205	8926	-	
		Drill Down	2017/20	2017-01-16	1020	Service	Installation	Installation labor	150.00	60.00	\$9,000.00		9D45-118205		red By Data	Plus 4
		Drill Down		2017-01-16		Service	Labor	General Labor		50.00	\$1,500.00		9D45-118205	8926		
		Drill Down	2017/20	2017-01-16	1020	Service	Removal	Removal labor	6	40.00	\$400.00		9D45-118205	8926		
										\$75.00	\$13,900.00					
© 2009-2010 Hogan Data. A	All rights reser		_												vered By Da	ataPlus
tes: 0		© 2009-2010 Ho	gan Data. /	All rights re	served.							Pow	ered By Data	Plus 4.0		

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

Sales Order Det	ails											7	Cur	rent A	ct
Customer	Kristie Bał	ocock	-			D	ate 5/5/2018						С	ontact	
	Addon fo	r music shop f	from back	of existing buildir	na		ber 45687123								
Memo						Sales Order		·							
						Juics or der									
Sales Order Iten	ns														
Add Memo	o Field	Add	Item				~	Add I	item			\sum_{i}	lter	n look	ับท
	Qty	Item Name	D	escription		Rate	:	Sub Total				(ectly fro	•
Remove	1	Concrete Sl	ab Fo	oundation slab - j	prep and pou	ring	\$10000.00	\$10	000.00					•	
Remove	1	Framing	Fr	raming labor			\$5500.00	\$5	500.00				Qu	ickBoo	OKS
Remove	1	Electrical Ma	aterials				\$800.00	\$	800.00						
Remove	2	Equip Renta	l –				\$200.00	\$	400.00						
						Cancel	Crea	te Sales (Order						
tact Kristi	cock's Musi e Babcock Activities			Babcock's Musi III onships Groups			ss Block	Babcoo Kristie I	<mark>ck's Music</mark> Babcock		e Status W	eb Info			
tact Kristin res History A ial Updates Ma	e Babcock Activities arketing Re	Opportunities esults Dataf	s Relatio	m	s/Companies eports	Documents Fin	ss Block ancial History	Babcoo Kristie I	<mark>ck's Music</mark> Babcock						
tact Kistie es History / ial Updates Ma View: QB: Cu	e Babcock Activities arketing Re ustomer Sal	Opportunities esults Dataf es Orders	s Relatio	III onships Groups encyWare QBR	s/Companies leports	Addre Documents Fin Browse All	ss Block ancial History	Babcoo Kristie I C / V Info	Ck's Music Babcock	s Employe	Expo	ort to Ex	cel		
tact Kristie es History A ial Updates Mi View: QB: Cu 1 Record	e Babcock Activities arketing Re ustomer Sal	Opportunitie: sults Dataf es Orders Name	s Relatio Plus Age	III onships Groups encyWare QBR Company	s/Companies leports	Documents Fin Browse All d Date	ss Block ancial History Due Date	Babcoo Kristie I C / V Info SO No	ck's Music Babcock	s Employe Sales Ta	Expo x Amount	ort to Ex Bala			Salos
tact Kristie es History A ial Updates Mi View: QB: Cu 1 Record	e Babcock Activities arketing Re ustomer Sal	Opportunitie: sults Dataf es Orders Name	s Relatio Plus Age	III onships Groups encyWare QBR Company	s/Companies leports	Addre Documents Fin Browse All	ss Block ancial History Due Date	Babcoo Kristie I C / V Info SO No	Ck's Music Babcock	s Employe Sales Ta	Expo	ort to Ex Bala	cel		Sales
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tact Kristie es History A ial Updates Mi View: QB: Cu 1 Record	e Babcock Activities arketing Re ustomer Sal	Opportunitie: sults Dataf es Orders Name	s Relatio Plus Age	III onships Groups encyWare QBR Company	s/Companies leports	Documents Fin Browse All d Date	ss Block ancial History Due Date	Babcoo Kristie I C / V Info SO No	ck's Music Babcock	s Employe Sales Ta	Expo x Amount 2.00 \$16,762	Bala			
tact Kisti es History A ial Updates Mi View: QB: Cu 1 Record Drill Down	e Babcock Activities arketing Re ustomer Sa nber 32059711	Opportunitie: sults Dataf es Orders Name	s Relatio	III onships Groups encyWare QBR Company Babcock's Music	s/Companies Leports	Addre Documents Fin Browse All Date Docu 05/05/2018	ss Block ancial History Due Date 5/20/2018	Babcoo Kristie I C / V Info SO No	ck's Music Babcock	s Employe Sales Ta	Expo x Amount 2.00 \$16,762 \$16,762	Bala	cel ance \$0		
tact Kisti es History A ial Updates Mi View: QB: Cu 1 Record Drill Down	e Babcock Activities arketing Re ustomer Sa nber 32059711	Opportunitie: sults Dataf es Orders Name Babcock's Mu mer Sales Ord	s Relation Plus Age usic Shop ders Detai	III onships Groups encyWare QBR Company Babcock's Music	s/Companies Leports	Addre Documents Fin Browse All d Date 105 05/05/2018	ss Block ancial History Due Date 5/20/2018	Babcoo Kristie I C / V Info SO No 7007	Ck's Music Babcock Addres Subtotal \$16,700.0	s Employe Sales Ta	Expo x Amount 2.00 \$16,762 \$16,762	Bala .00	cel ance \$0		
tact Kristi es History A ial Updates Mi View: QB: Cu 1 Record Drill Down History: 4 Records	e Babcock Activities arketing Re ustomer Sa hber \$2059711 QB: Custo Due Date	Opportunitie esults Dataf les Orders Name Babcock's Mu mer Sales Ord SO No	s Relatio	III onships Groups encyWare QBR Company Babcock's Music ils (SO No) Item	s/Companies leports Perior : Shop 2018/	Addre Addre Documents Fin Browse All Browse All Dot Solve S	ss Block ancial History Due Date 5/20/2018	Babcoo Kristie I C / V Info SO No 7007	Ck's Music Babcock Addres Subtotal \$16,700.0	s Employe Sales Ta 20 \$6	Expo x Amount 2.00 \$16,762. \$16,762.	00 00 00 00 00 00 00 00 00 00 00 00 00	cel \$0 cel	C	Drder
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tact Kristi es History A ial Updates Mi View: QB: Cu 1 Record Drill Down History: 4 Records	e Babcock Activities Activities arketing Re ustomer Sal 2059711 2059711 QB: Custo Due Date 5/20/201 5/20/201	Opportunitie: sults Dataf es Orders Name Babcock's Mu mer Sales Ord S O No 8 7007 8 7007	s Relation Plus Age usic Shop ders Detai Type Service Service	III Danships Groups encyWare QBR Company Babcock's Music Is (SO No) Item Concre Framin	s/Companies Leports Perior : Shop 2018/ III ete Slab g		ss Block ancial History Due Date 5/20/2018	Babcox Kristie I C / V Info SO No 7007 Qty ng 1.00	Subtotal Subtotal	s Employe Sales Ta 00 \$6 Rate 10000.00	x Amount 2.00 \$16,762. \$16,762. (Expo Amount \$10,000.00 \$5,500.00	ort to Ex Bala .00 .00 .00 .00 .00 .00 .00 .00 .00 .0	so cel Inv 0	C	Order
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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

	0 1 7 0										_/		· ·
Name	Counter Tops (Ba	DCOCKMUSIC)	D	_					r Number				
Totals			Days Oper				_	mpany				Current	t Act
Total	\$5,399.98		Open Date		5/5/2018		-		lanager	Admin		Conta	act
Weighted	\$540.00		Days Open		0		Ve	ndorr I	Number				
Probability	10 🚔		Est. Close I	Date	5/5/2018	•	 Sa 	les Re	presentative				
Gross Margin	\$1,549.98		Act. Close I	Date		-	- Do	cumer	it No				
Process/Stage			Status		Open		Do	cumer	it Type				
Process	ACT! Sales Cycle	-			Closed - W	/on	Do	cumer	it Job		~		
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Contacts Groups/	Companies Produ	cts/Services	Notes Activitie	s Histo	ry Documents	Opportunit	y Info	Oppor	tunity Access	User Field	s		
🕞 Add 😑 Del	lete												Options 👻
Name	∠ Item #		G	uantity	C	ost	Pr	ice	Adjusted Pri	се	Disco	unt	Subtotal
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		·		1.00000	\$1,750	.00	\$1,899	1.98	\$1,899	30	0.0000	0%	\$1,899.98
Company <u>Babco</u> Contact Kristie	ock's Music Shop Babcock		bcock's Music Shop				S1,899 Babcock	k's Mus	ic Shop	36	0.0000		\$1,839.38
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