HOGAN DATA
Managing Your Information!

DataPlus Addon Software

sage
50 US
Accounting

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 – Proposales – 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

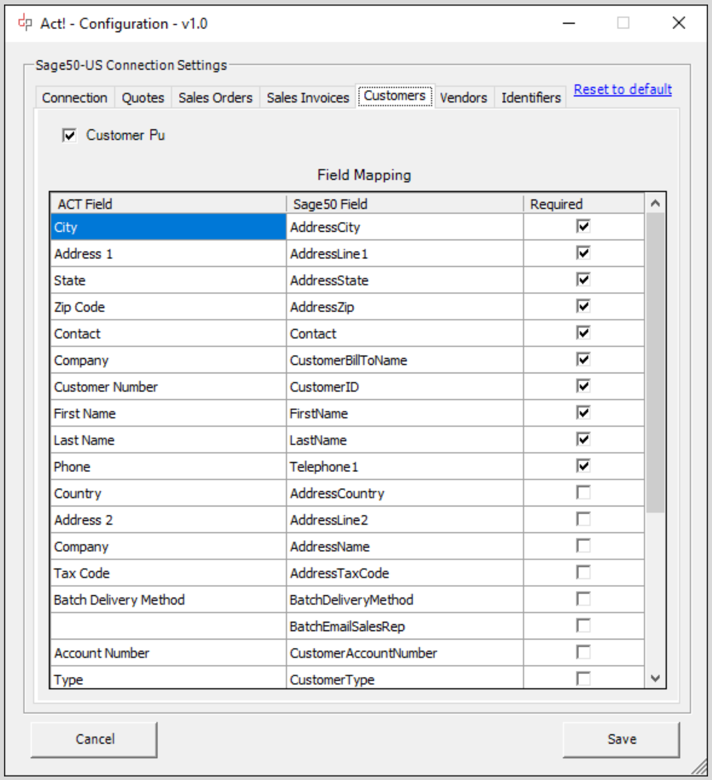
- Customer
- Vendor

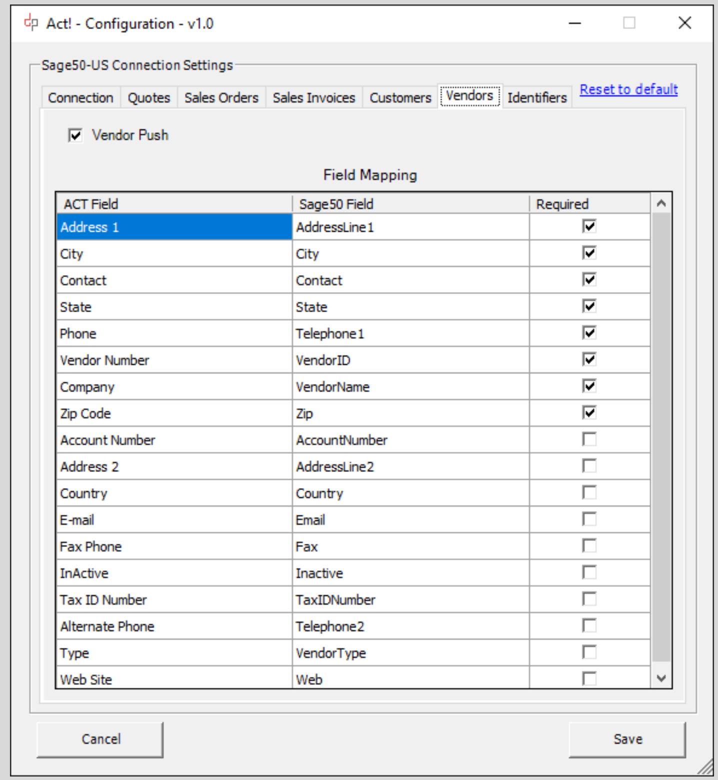
You can edit Customer or Vendor from Act

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 oringinally created in Sage 50 they will be imported into Act on a scheduled basis





Push Sage 50 Contacts

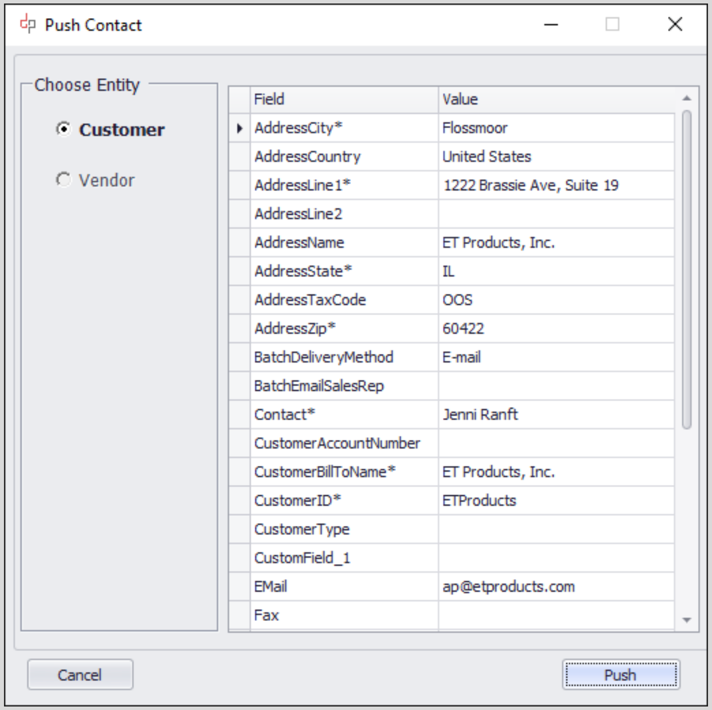
Eliminate double entry for your contacts saving you time & provide more consistency between Sage 50 and Act.

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 oringinally created in Sage 50 they will be imported into Act in Company & Contact level on a scheduled basis.

Contact Information

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

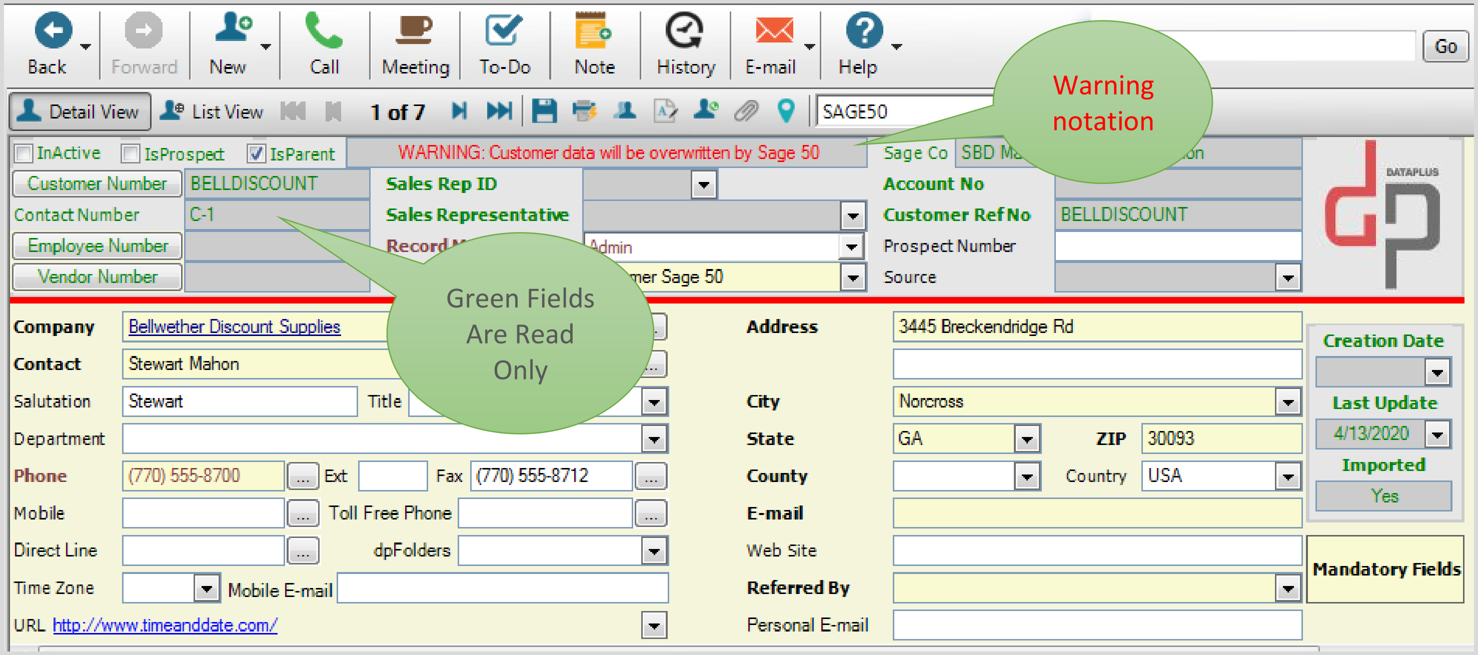
Custom Protected Fields

- 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



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

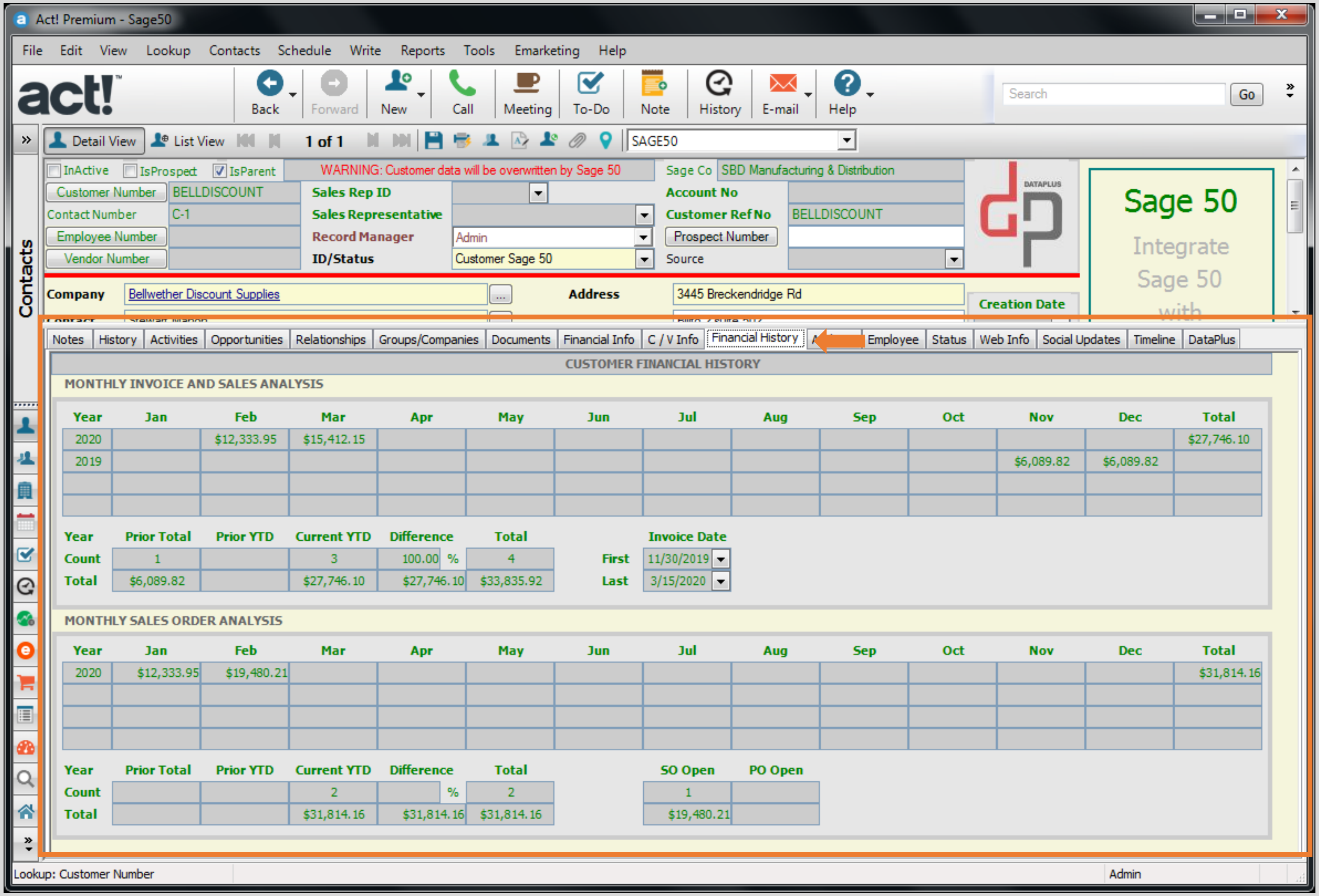
Sales / Purchase History

- 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



- 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

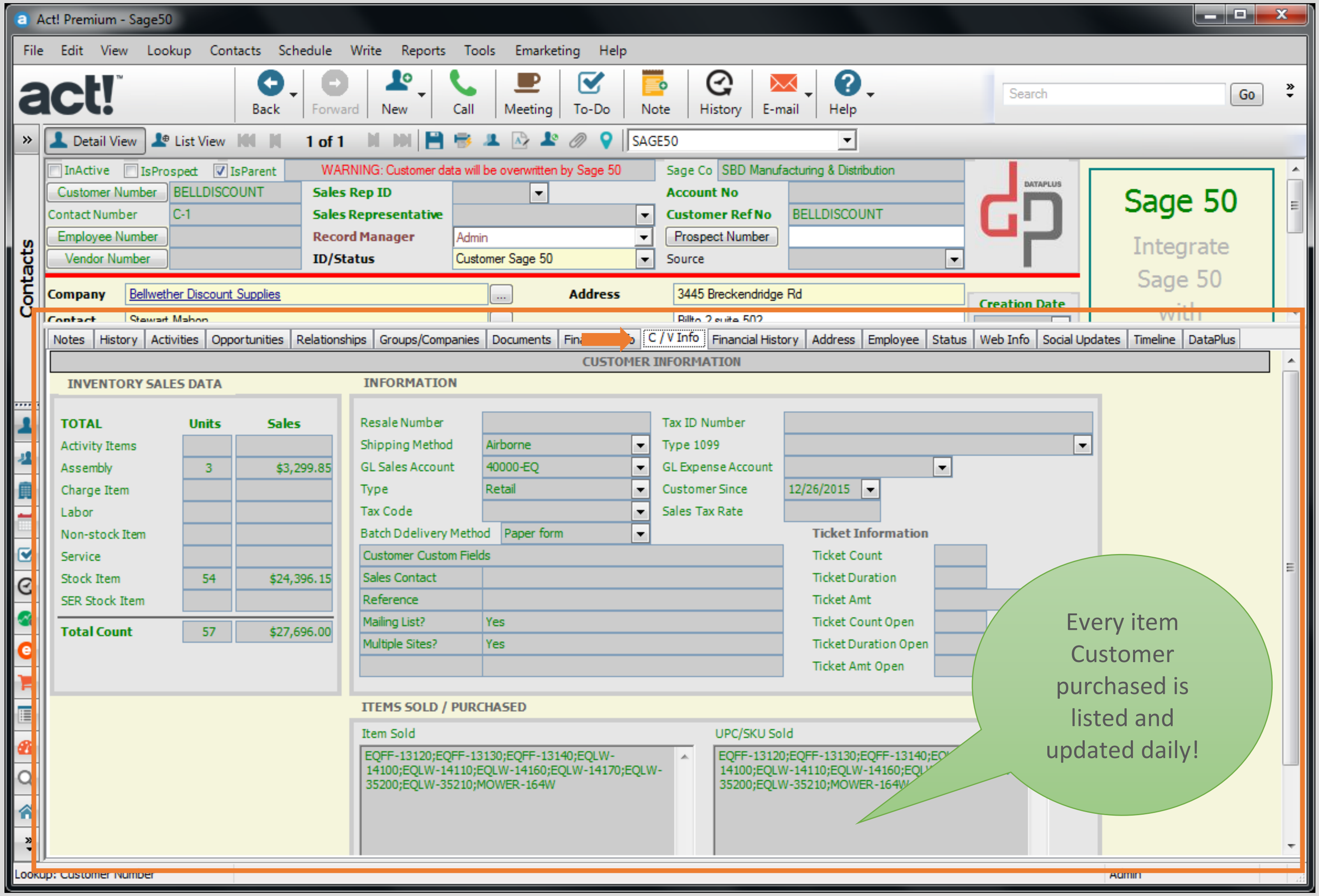
Inventory Sales Data

- 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



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.

Sage 50 Financial Information In Act Field

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

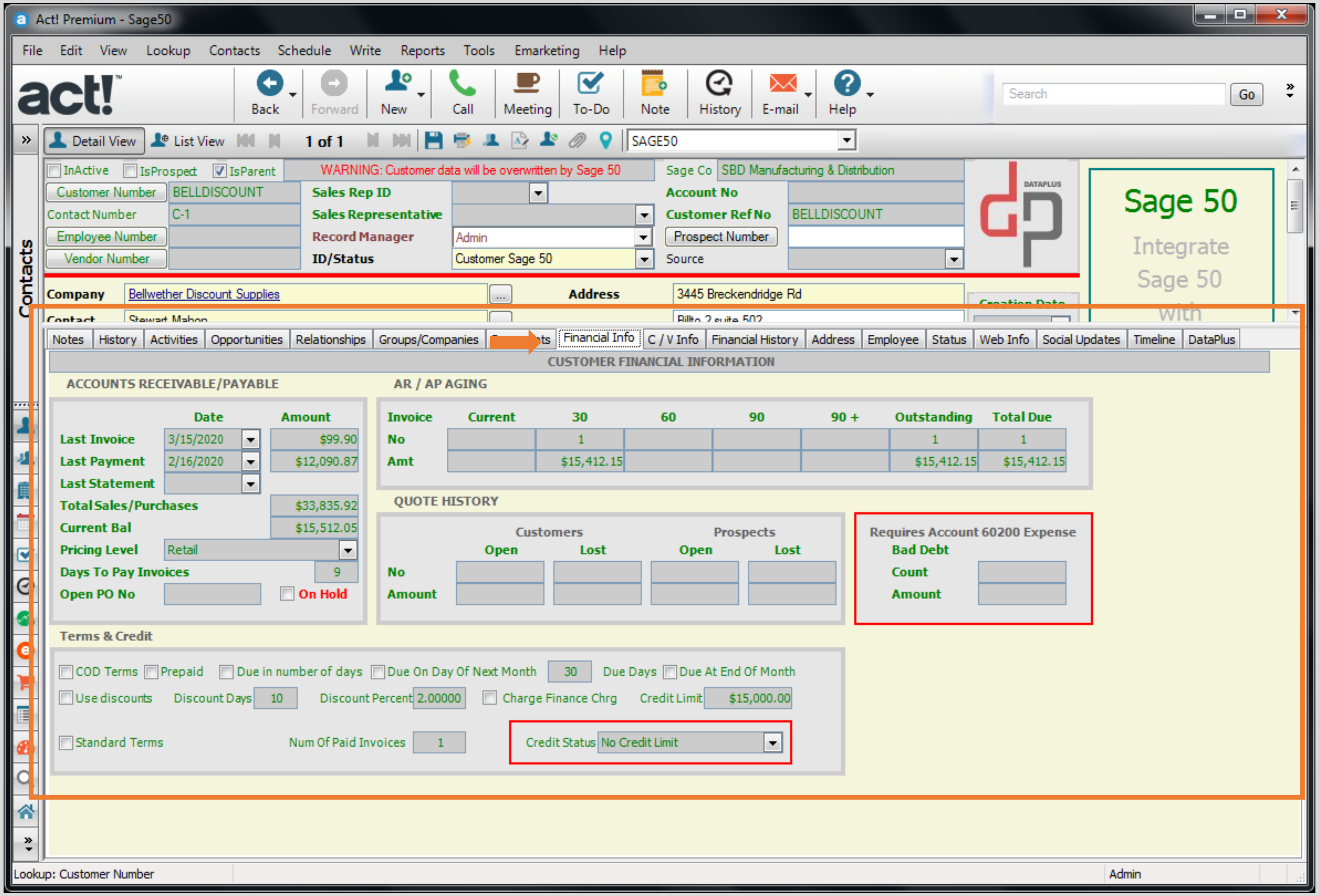
- Current
- 30, 60, 90, 90+
- Total

Quote History

- Customer/Prospect
- Open / Loss

Terms & Credit

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



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

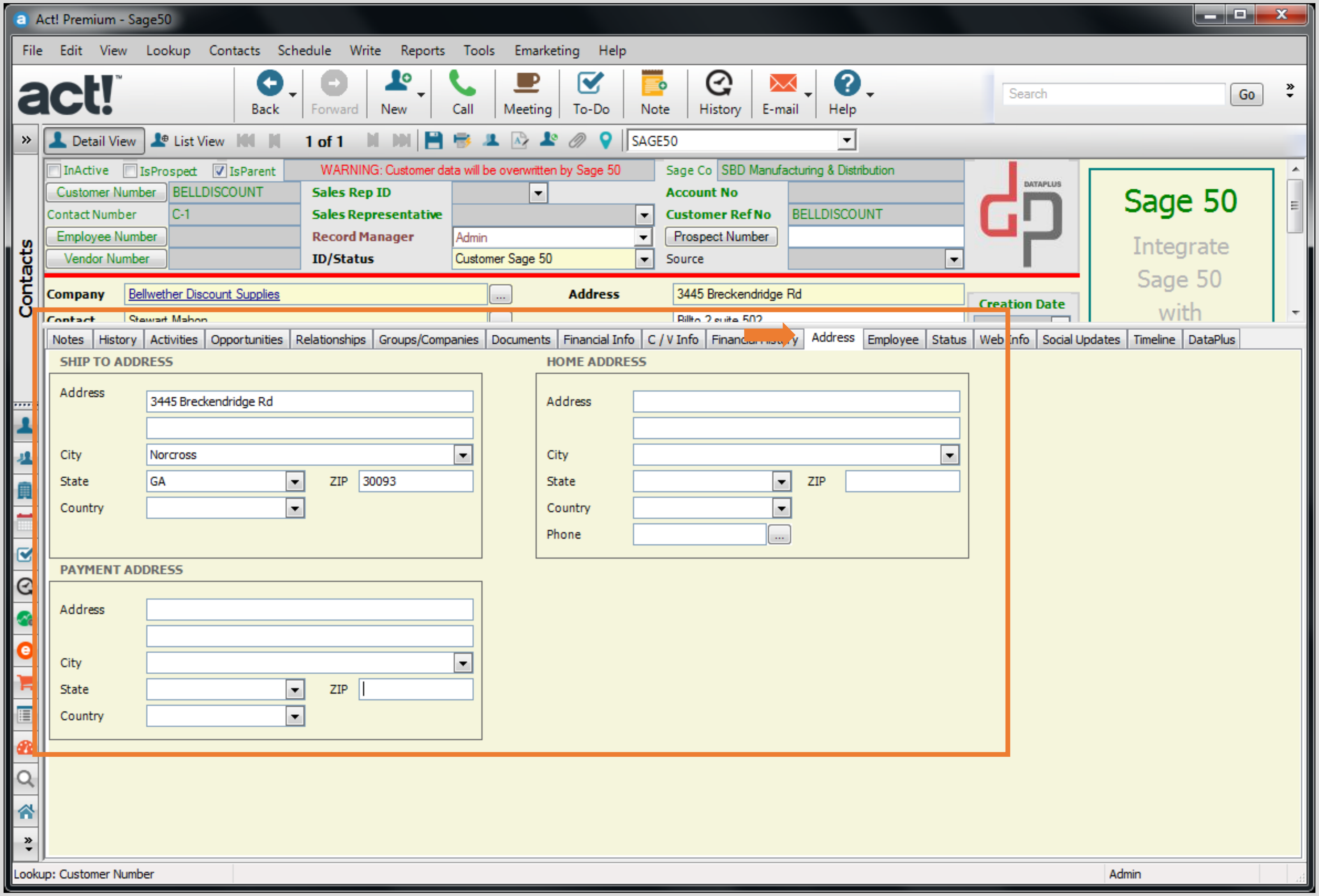
Sold To Information

Ship To Address

Payment Address

Home Address

Sage 50 Additional Address Fields



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

Sage 50 Employee Information

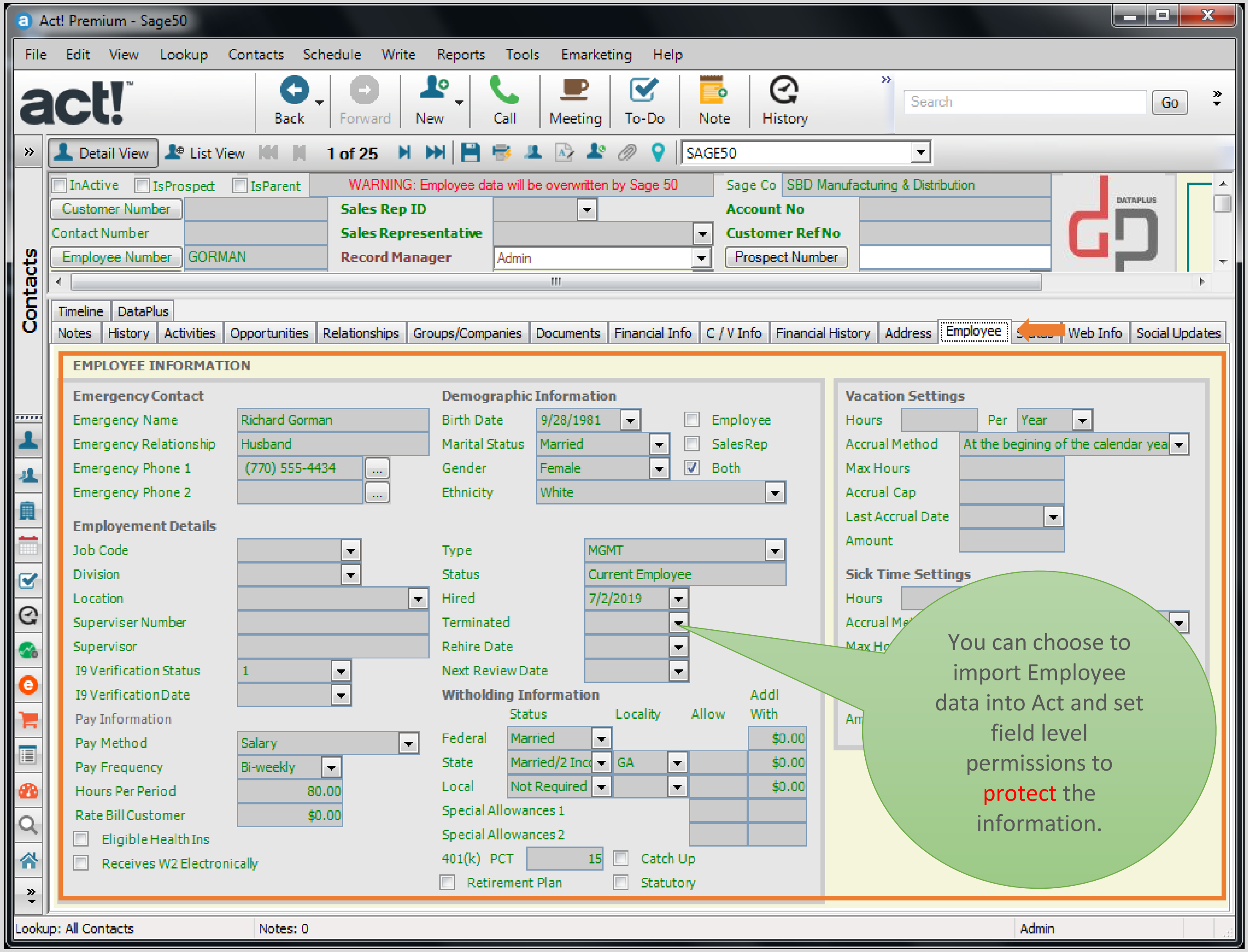
Contact Employee

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



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.

Sage 50 / Act Unigue IDs

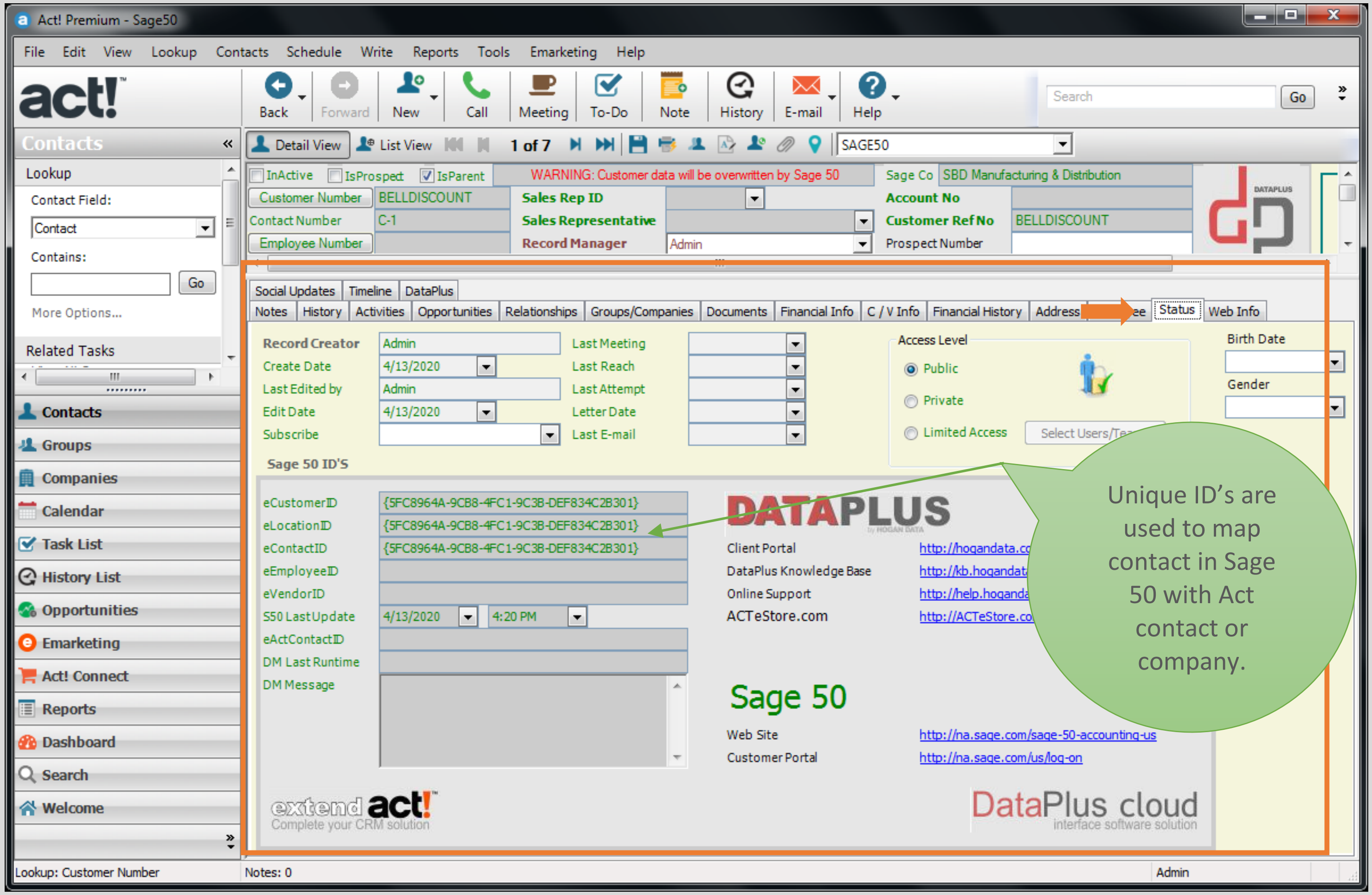
Contact Status

Sage 50 ID's

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

Contact Subscribe

DataPlus Help Links



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

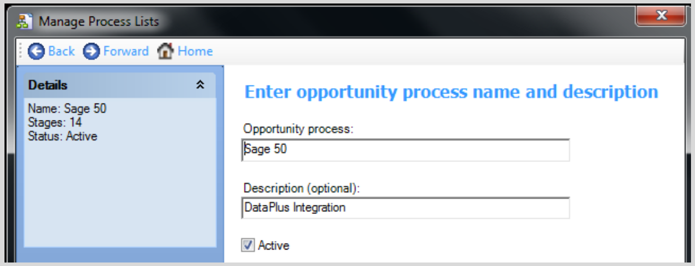
Manage Product List

- DataPlus imports items from Sage 50 to Product List

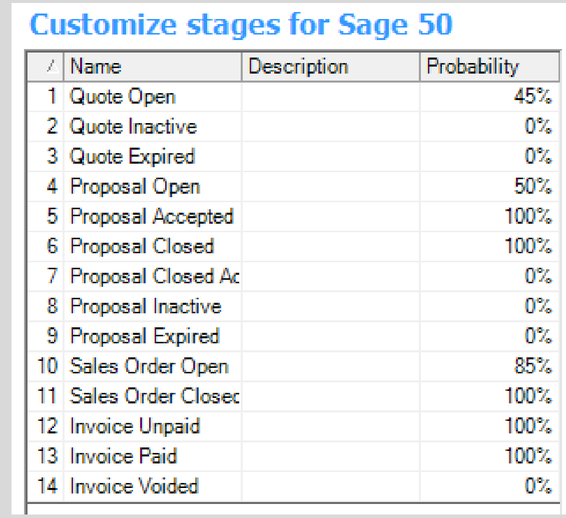
Push Act Opportunity to Sage 50 Transactions

Configure & Manage Act Opportunity

Create Sage 50 Opportunity Process



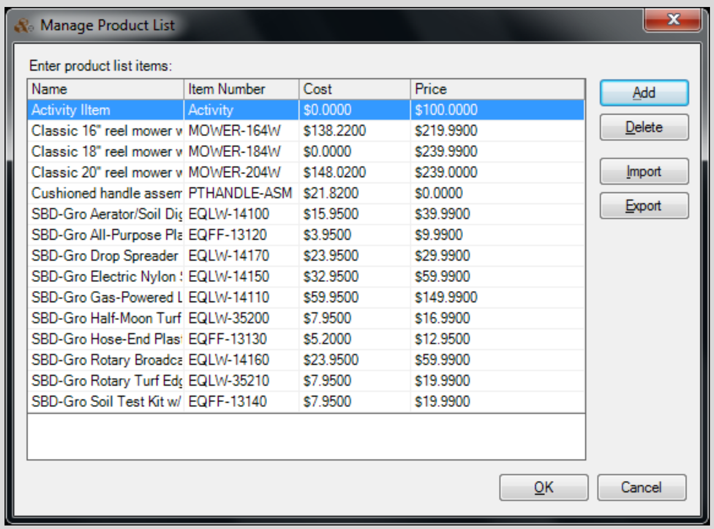
Create Sage 50 Stages



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.



Manage Product List

Enter product list items:

Name	Item Number	Cost	Price
Activity Item	Activity	$0.0000	$100.0000
Classic 16" reel mower v	MOWER-164W	$138.2200	$219.9900
Classic 18" reel mower v	MOWER-184W	$0.0000	$239.9900
Classic 20" reel mower v	MOWER-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

Add | Delete | Import | Export

OK | Cancel

Currently available in DataPlus Sage 50 US Act database.

Act Opportunities

Create New Act Opportunity

Preferably from contact level, create Act Opportunity

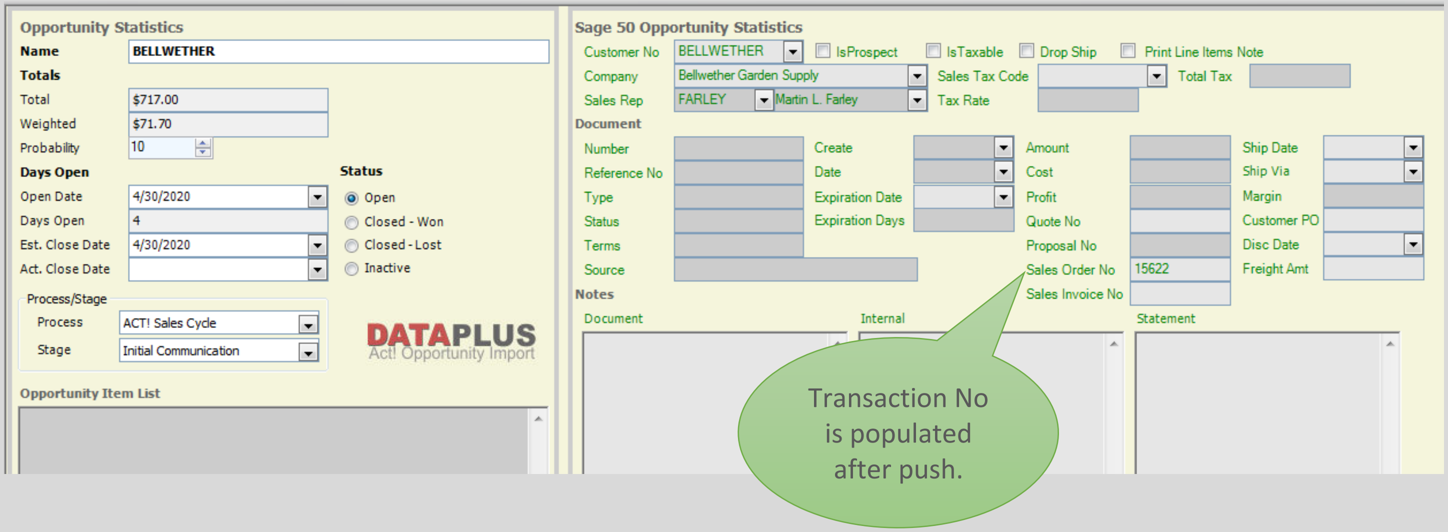
- Name your opportunity
- Populate Open date and Est. Close Date
- Add products / services to opportunity

Push Act Opportunity

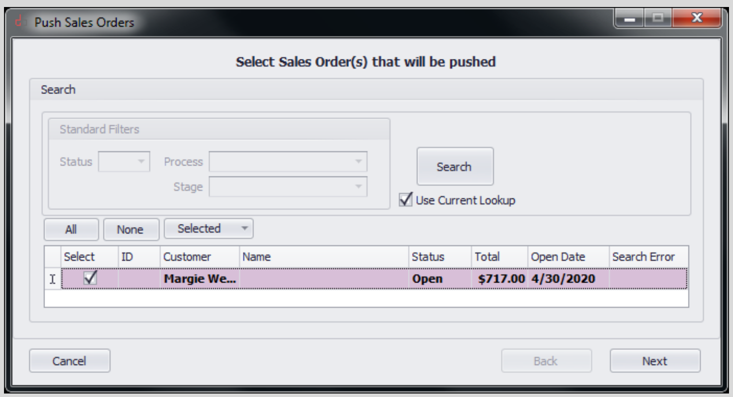
- From menu item in Act Push transaction
- Quotes..
- Sales Orders..
- Sales Invoices..

Push Act Opportunity to Sage 50 Transactions

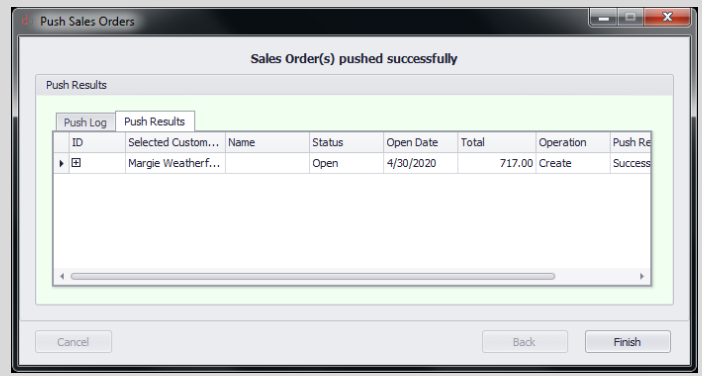
Create Act Opportunity



Push Act Opportunity to Sage 50



Created Sage 50 Quote, SO or Invoice



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.

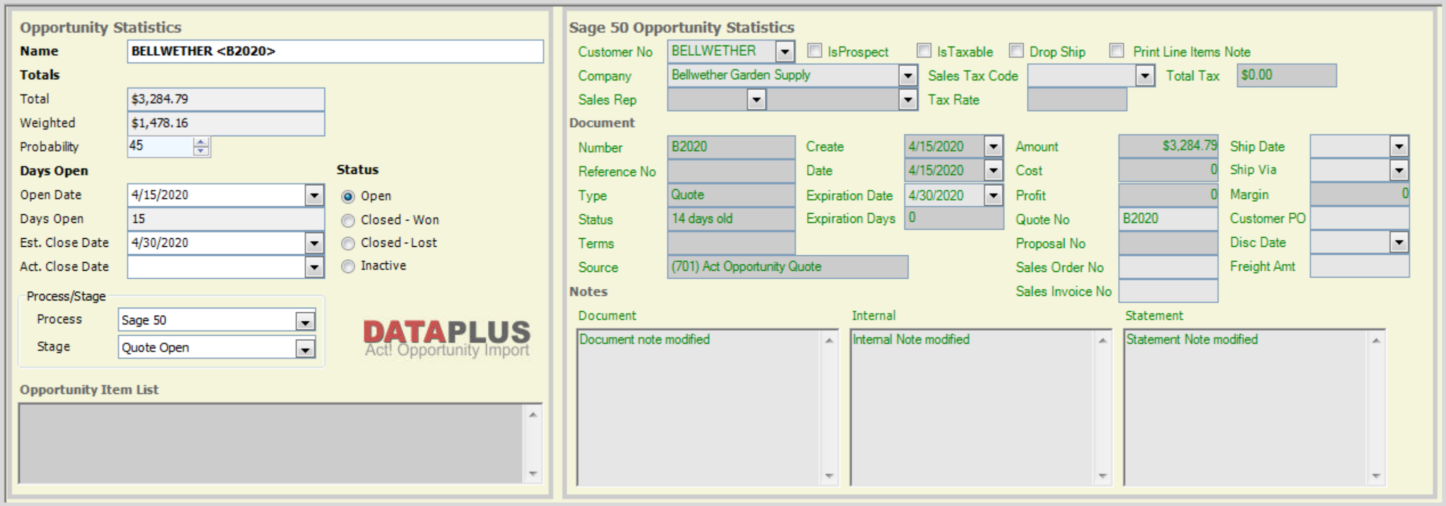
As a transaction migrates from transaction type to new type, e.g. Quote to Sales Order to Invoice, the original Act Opportunity is updated and referenced.

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



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

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
- 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

- 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 Profitabilty
- Job Profitabilty 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

Sage 50

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 | Browse All.. | Export to Excel

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) | Export to Excel

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) | Export to Excel

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

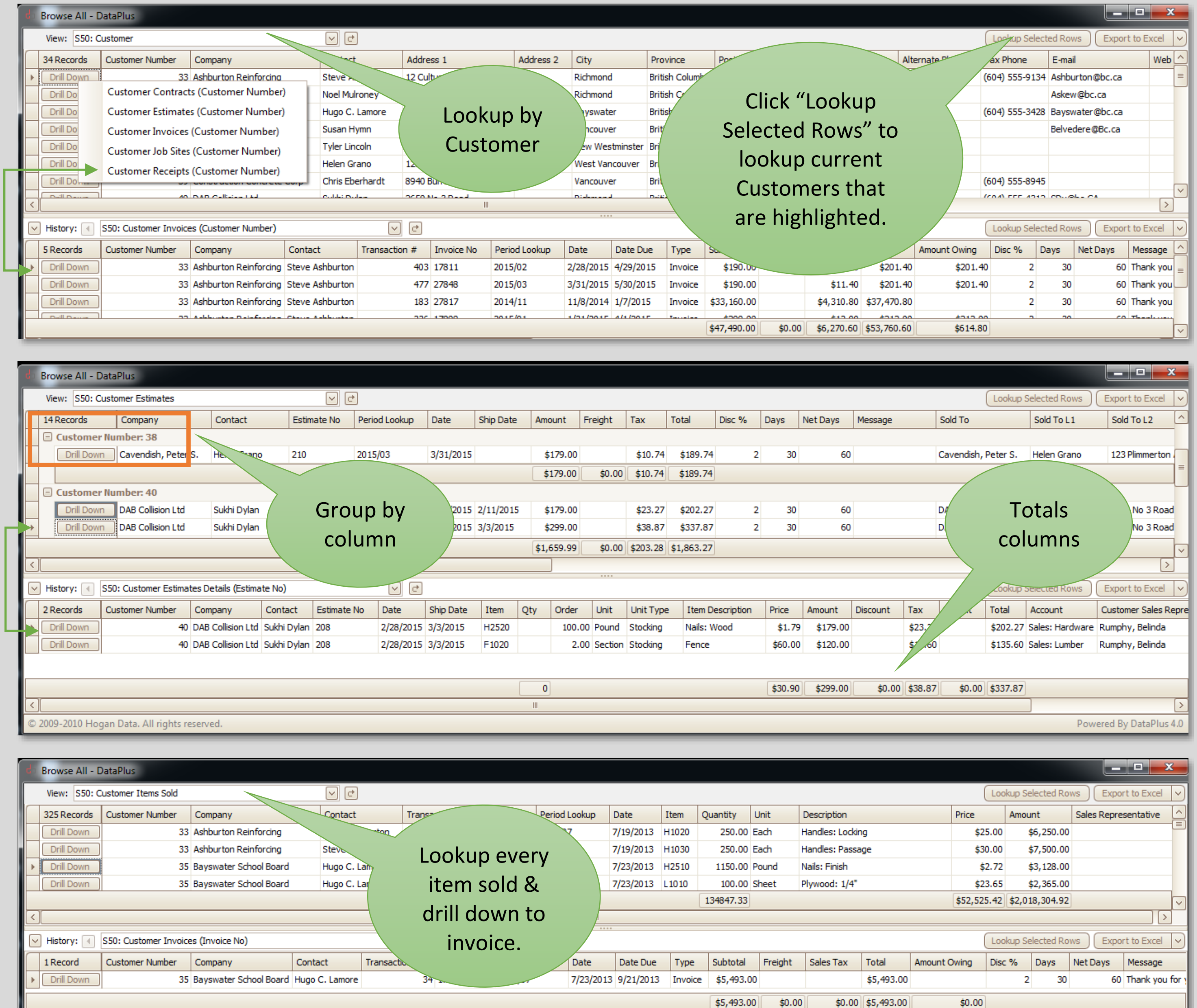
History: S50: Customer Receipt (Record No) | Export to Excel

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	

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



Sage 50 Transactions

Browse All Menu

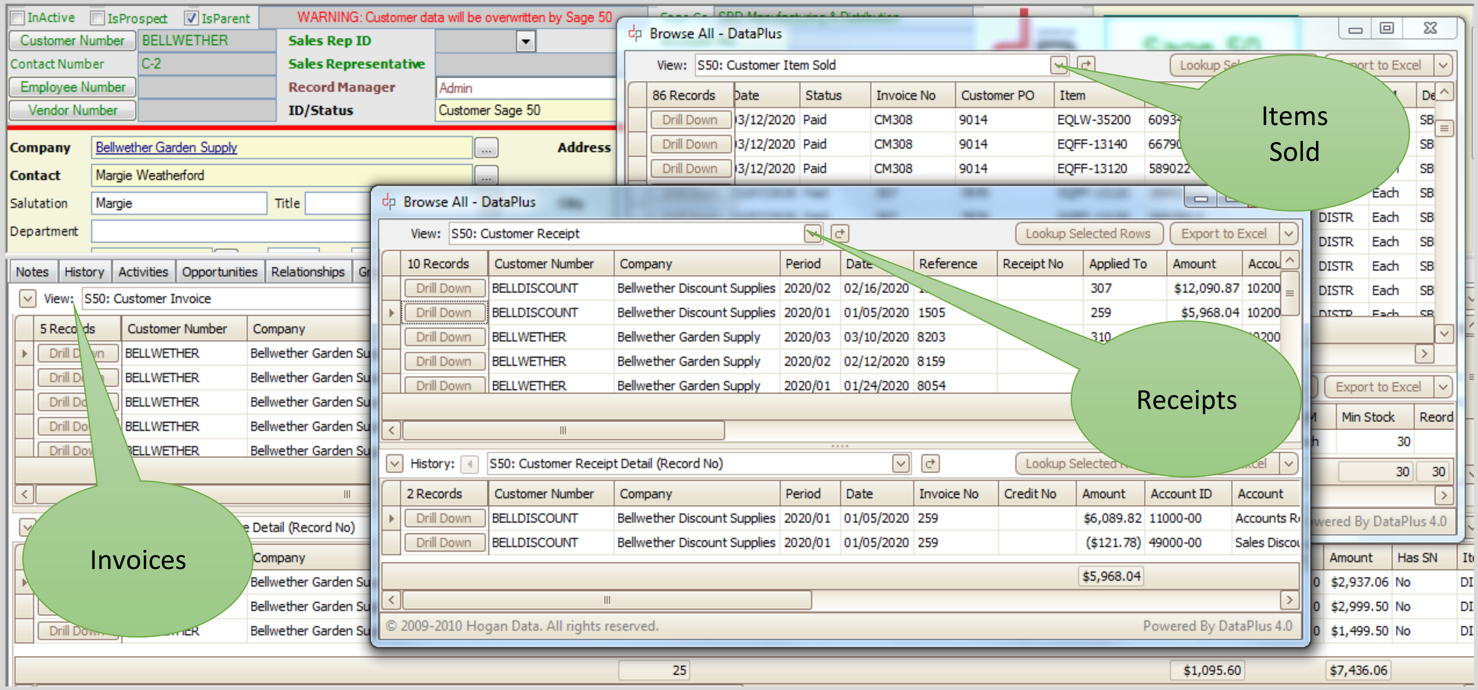
DataPlus allows you to deep dive into multiple instances of “Browse All”.

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



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

sage 50 US Accounting

sage 50 CA Accounting

sage 100 Accounting

sage 100 Contractor

sage Business Works

sage 500 Accounting

QuickBooks

Microsoft Dynamics GP

Evo~ERP Accounting

e-automate ECi

SAP Business One

SYSPRO ERP

medisoft Medical Software

Omni MR 8 Office Management Software

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

Contact Us - Web Site - About Hogan Data