



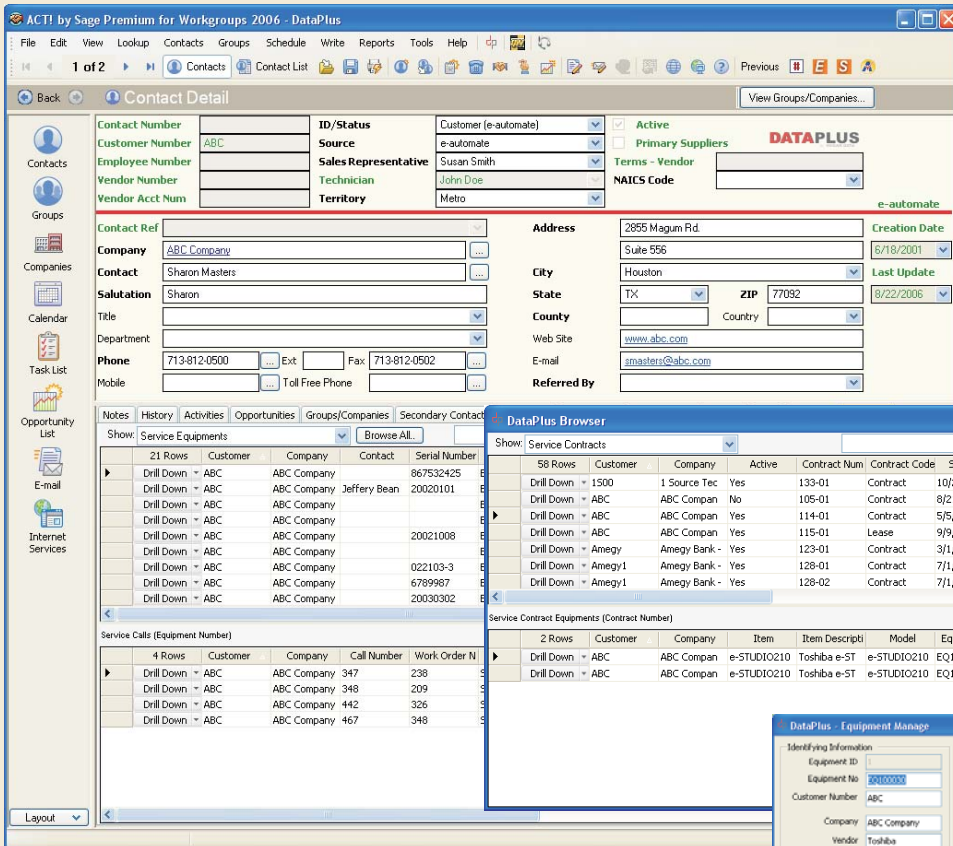
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DATAPLUS

by HOGAN DATA

completes your crm solution



The screenshot shows the ACT! by Sage Premium for Workgroups 2006 - DataPlus interface. The main window displays 'Contact Detail' for a customer named 'ABC Company'. The contact information includes Sharon Masters as the contact, with phone number 713-812-0500 and email smasters@abc.com. The address is 2855 Magum Rd, Suite 556, Houston, TX 77092. The interface also shows a 'DataPlus Browser' window with two tables: 'Service Contracts' and 'Service Contract Equipments (Contract Number)'. The 'Service Contracts' table lists various contracts with columns for Customer, Company, Active status, Contract Num, Contract Code, Start Date, Exp Date, Exp Copies, BaseBillingCyc, and BaseArrears. The 'Service Contract Equipments' table lists equipment with columns for Customer, Company, Item, Item Description, Model, Equipment Nu, Serial Number, Contract Num, Install Date, Warranty Dat, Active status, and Sales Rep. A third window, 'DataPlus - Equipment Manage', shows details for a specific equipment item, including identifying information, location information, item status, and compliance information.

View e-automate Customer information and profile in ACT!

Search and view live e-automate data in ACT!

Manage and track prospect's equipment!



“Critical and statistical information exported from e-automate to ACT!”

ACT! Premium

by Sage

For Workgroups

Accounts Receivable information at your finger tips!



The screenshot displays the ACT! Premium for Workgroups - DataPlusDemo software interface. The main window shows contact details for 'ABC Company' with contact 'Sharon Masters'. Below the contact information, there are several data sections:

- ACCOUNTS RECEIVABLE:** A table showing bill-to information and a summary of invoices.

Bill To	Current	30	60	90	Outstanding	Total Due
Total Invoices No	45	0	0	19	19	19
Total Invoices \$	\$70,795.45	Invoices Due \$	\$0.00	\$0.00	\$23,777.95	\$23,777.95
- CONTRACTS - LEASES:** A table showing contract statistics.

Contracts Total No	3
Contracts Active	2
Contracts Active Amount	\$2,629.00
Contracts Earliest ExpDate	5/5/2004
Leases No	
Leases Value	
Leases Earliest ExpDate	
- WORK ORDERS - SERVICE CALLS - SALES ORDERS:** A table showing work order and sales order statistics.

Total Work Orders	20
Service Calls Current Year	
Service Calls Open	16
Service Calls Total	25
Sales Orders Open Amount	\$68,951.99
Sales Orders Open No	16
- INVENTORY DATA:** A table showing inventory items.

	Units	Cost	Income
Serialized Items	56	\$96,097.00	\$98,100.00
NonSerialized Items	16	\$446.99	\$741.96
No of Active Equip	21		
- CUSTOMER INFORMATION:** A table showing customer details.

Price Level	Retail	<input type="checkbox"/> Requires PO
Shipping Method	Delivery	<input checked="" type="checkbox"/> Taxable
Customer Type	BUS	
Terms - Customer	Net 30	
- METER CONSOLIDATION:** A table showing meter statistics.

No	Meter Digits	Avg 3 Mo Vol	Avg 6 Mo Vol	Avg 12 Mo Vol
16	52	746.8447	133.6968	0.0000
		Avg Mo Vol	Mfg Mo Sug Vol	Target Monthly Vol
		0.0000	186,000.0000	186,000.0000

Quick view of your customer's information!

Complete your CRM solution with:

DATAPLUS

by HOGAN DATA

ACT! DATABASE INTEGRATION

“Protect and Secure your data with ACT! and DataPlus Permissions!”

ACT! Premium

For Workgroups

by Sage



Field Level Security
Restrict access by user and by team and grant Read-Only Access or No Access to chosen fields using field level security.

Users	Access	Based On
Eric Dunn	No Access	User Permission
John Doe	No Access	User Permission
Kenny Johnson	Read Only	User Permission
Lisa Beal	Read Only	User Permission
Mark Watthuber	Read Only	User Permission
Rick Stout	No Access	User Permission
Sam Sanderson	No Access	User Permission
Steven Klotz	Read Only	User Permission
Susan Smith	Full Access	Default Permission

Manage Users
Allow specific permissions for each User

Password Settings
Keep data more secure with the ability to set password rules including; Password Expiration Options, Complexity of a Password, and Password Re-use.

Requirements:

- User cannot reuse last 2 passwords
- Password must change every 30 days
- Minimum duration between password changes is 15 days
- Password must be at least 6 characters in length
- Password must contain 4 character groups:
 - Lower-case (a-z)
 - Upper-case (A-Z)
 - Numbers (0-9)
 - Special characters (such as !@#%)

View Name	Export	Report	Manage
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Restricted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Browse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Manage DataPlus Permissions with ACT! Login Standards!

Manage Users
Access to e-automate Views in DataPlus

View Name	Administrator	Manager	Standard	Restricted	Browse
vw_Companies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_CustomerAPaymentTransactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerARTransactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerARTransactionsOpen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerFinancialInformation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerInformation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_CustomerInvoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerInvoicesDueBillTo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerPaymentApplications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_CustomerPayments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
vw_Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_CustomersContacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_CustomersContactActivities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_db_ServiceEquipmentInComp...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_db_ServiceEquipmentInComp...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

View Name	Admin	Charlie Brown	Chuck Hogan	Eric Dunn	John Doe	Kenny Johnson	Lisa Beal	Mark Watthuber	Rick Stout	Sam Sanderson	Steven Klotz	Susan Smith
Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charlie Brown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chuck Hogan	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eric Dunn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John Doe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kenny Johnson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lisa Beal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mark Watthuber	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rick Stout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sam Sanderson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Steven Klotz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Control Access to Sales Reps' Customer Data!



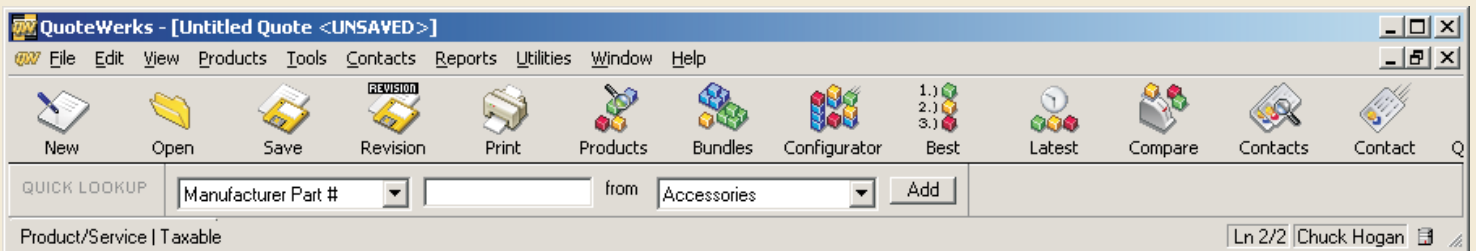
“Simplify and manage your quoting process using QuoteWerks and DataPlus for e-automate!”



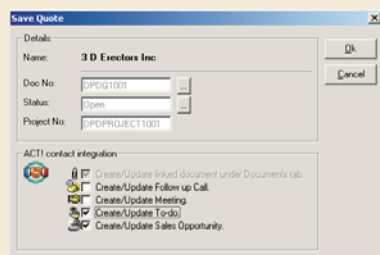
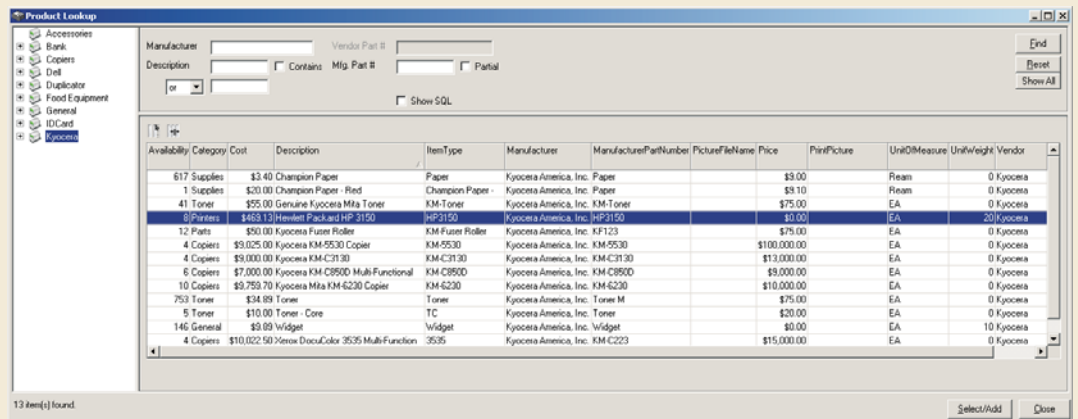
QuoteWerks allows companies to create detailed quotes with speed and efficiency.

Configurator simplifies quoting process for sales representatives through a step-by-step process.

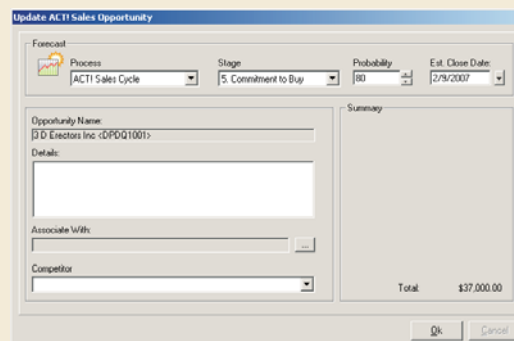
Create a bundle that includes all items you want to quote together and specify details like quantity.



DataPlus dynamically creates product list by Vendor and Category from e-automate and configures product list in QuoteWerks!



Save your quote and create an activity in ACT, then print quote with custom forms!



QuoteWerks creates or modifies Opportunity in ACT!

DataPlus allows you to view quotes and the quote details relating with your prospects or customers and drills down to related e-automate data!

