

Complete your CRM solution with:
DATAPLUS
 by HOGAN DATA
 ACT! DATABASE INTEGRATION



ACT! Premium
 For Workgroups
 by Sage

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DATAPLUS
 by HOGAN DATA

completes your crm solution

View Customer information and profile in ACT!

Search and view live data in ACT!

Manage and track prospect's equipment!



HOGAN DATA
 Managing Your Information!

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“Critical and statistical information exported from SQL database to ACT!”

ACT! Premium

by Sage

For Workgroups

Accounts Receivable information at your finger tips!



Quick view of your customer's information!

Complete your CRM solution with:
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The screenshot displays the ACT! Premium for Workgroups - DataPlusDemo software interface. The main window shows contact details for 'ABC Company' with contact 'Sharon Masters'. The interface includes a sidebar with navigation options like 'Contacts', 'Groups', 'Companies', 'Work Week', 'Monthly Calendar', 'Task List', and 'Opportunity List'. The main content area is divided into several sections:

- Contact Detail:** Fields for Contact Number (ABC), Customer Number (ABC), Employee Number, Vendor Number, Vendor Acct Num, ID/Status (Customer (e-automate)), Source (e-automate), Sales Representative (Susan Smith), Sales Rep Assigned (John Doe), Technician, Terms - Vendor, NAICS Code, Prospect Number, and Territory (Metro).
- ACCOUNTS RECEIVABLE:** A summary table showing 'Total Invoices No' (45), 'Total Invoices \$' (\$70,795.45), and 'Invoices Due \$' (\$0.00). It also shows 'Current', '30', '60', '90', 'Outstanding', and 'Total Due' amounts.
- CONTRACTS - LEASES:** Summary table with 'Contracts Total No' (3), 'Contracts Active' (2), 'Contracts Active Amount' (\$2,629.00), and 'Leases No' (1).
- WORK ORDERS - SERVICE CALLS - SALES ORDERS:** Summary table with 'Total Work Orders' (20), 'Service Calls Current Year' (16), 'Service Calls Open' (25), 'Sales Orders Open Amount' (\$68,951.99), and 'Sales Orders Open No' (16).
- INVENTORY DATA:** Summary table with 'Serialized Items' (56), 'NonSerialized Items' (16), and 'No of Active Equip' (21).
- CUSTOMER INFORMATION:** Fields for Price Level (Retail), Shipping Method (Delivery), Customer Type (BUS), and Terms - Customer (Net 30).
- METER CONSOLIDATION:** Summary table with 'No' (16), 'Meter Digits' (52), 'Avg 3 Mo Vol' (746.8447), 'Avg 6 Mo Vol' (133.6968), 'Avg 12 Mo Vol' (0.0000), 'Avg Mo Vol' (0.0000), 'Mfg Mo Sug Vol' (186,000.0000), and 'Target Monthly Vol' (186,000.0000).

“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.

Define Fields

Details: Name: AR Total Invoices, Type: Currency, Record Type: Contacts, Created: 7/29/2006, Custom Field

Field Security

Default permission is applied to all users. Edit the user or team permission to override the default.

Field: AR Total Invoices, Default Permission: Full Access

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

Manage User Tasks: Create New User, Edit User Information, Specify Access, Add Permissions, Add User to Team

Add Permissions

Each type of security role allows the user to perform different sets of actions (permissions) in ACT!. User roles may be extended by adding optional permissions. See Help for more information on permissions.

Available Permissions (optional): Remote administration, Accounting link tasks, Handheld device Sync

Added Permissions: Delete records, Export to Excel

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.

Password Policy

Enforcing a stricter password policy may require users to change their passwords to conform to the new policy. A zero (0) setting means no limitation.

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 0 of 4 character groups:
 - Lower-case (a-z)
 - Upper-case (A-Z)
 - Numbers (0-9)
 - Special characters (such as !@#%&)

Manage Permissions

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 SQL Views in DataPlus

Manage Permissions

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_CustomerAPPaymentTransactions	<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_CustomerContacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
vw_CustomerContactsActivities	<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"/>

Manage Permissions

Sales Representatives	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!

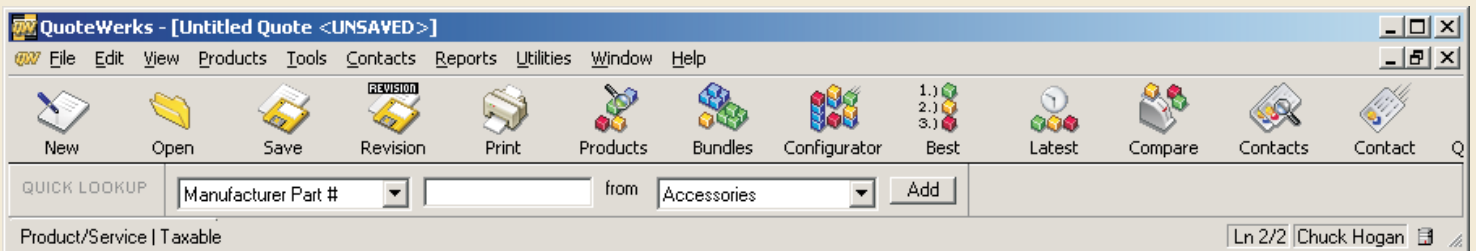
“Simplify and manage your quoting process using QuoteWerks and DataPlus for ACT!”



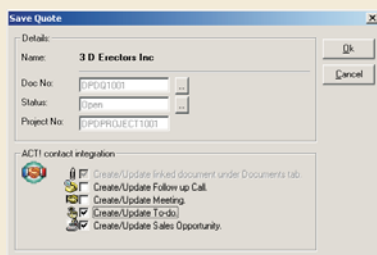
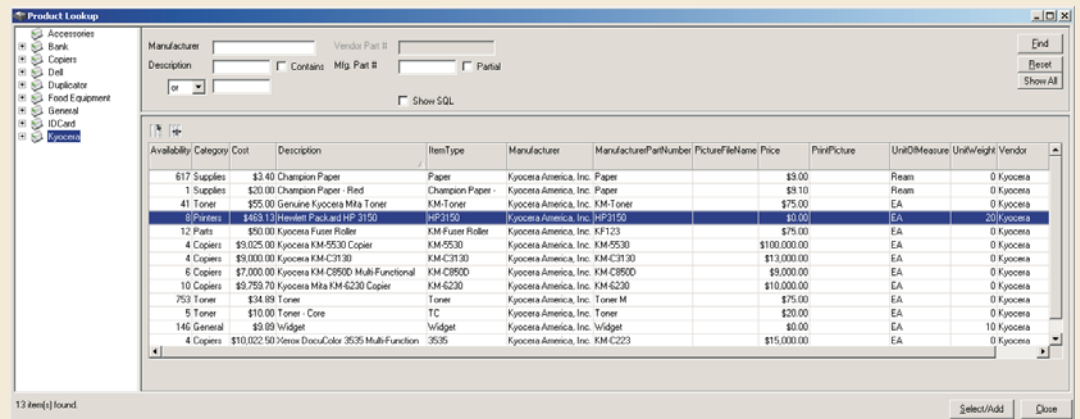
QuoteWerks allows companies to create detailed quotes with speed and efficiency.

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

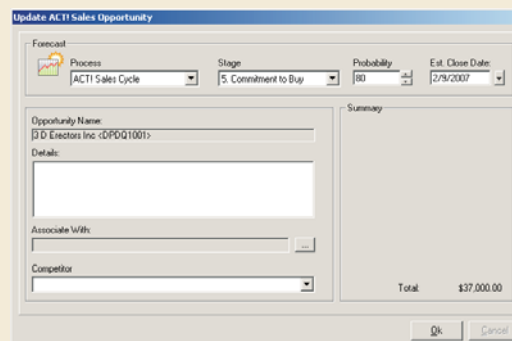
Create a bundle that includes all items you want to quote together and specify details like quantity.



DataPlus dynamically creates product list by Vendor and Category from SQL database 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 your SQL data!

