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info Newsletter
For ACT! by Sage

Connecting Your Front-Office And Back-Office Systems

How many places do you store customer information in your organization? If your company is like most, different types of customer information are kept in two or more applications. Your finance department tracks existing customer information including credit limits, product purchase history, and payment trends in the accounting software. The sales department stores information about prospective and existing customers in ACT! by Sage, including contact information, opportunities, and details about customer buying patterns.

Each department has a solution for their needs and can live happily ever after, right? The problem is that both systems contain customer information that the other system needs, resulting in duplicate data entry and inefficient workflow for both sales and accounting staff.


Connecting your front-office and your back-office systems can make for a more productive workplace.

Integrated Systems

There's a great solution to this problem: ACT! by Sage can be connected to a variety of Sage Software accounting solutions. By using these products together, your sales team has the data they need to track customers as well as prospects, and your internal customer service team has access to all the information they need to provide excellent customer service.

Synchronizing customer and prospect information between ACT! by Sage and a Sage Software accounting solution can provide some important benefits, including increased productivity, a more harmonious workplace, and increased customer satisfaction.

Staff Productivity

When information exists in systems that don't communicate with each other, it is likely that your staff is operating without the information they need to be most effective in their jobs. Sales representatives may work on new opportunities without realizing the customer has exceeded their credit limit. When the sales team closes a deal, the prospect information must be keyed into the accounting system, incurring both the unnecessary overhead of duplicate data entry and the possibility of errors.

The lack of a centralized view of customer information is often a source of conflict between staff members. Accounting staff may have concerns about access to confidential information. Sales team members may see accounting staff as creating unnecessary bottlenecks in the sales

Headline News

Sage Software recently announced the availability of ACT! by Sage for Financial Professionals 9.0. Designed for financial advisors and brokerage firms, this industry solution helps financial professionals prioritize their time between converting prospects to clients, up-selling existing clients, and keeping in step with industry standards.

sage software Certified Consultant

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Connecting Your Front-Office And Back-Office Systems CONTINUED

process. All this can be solved by integrating ACT! by Sage with your accounting system.

Increased Customer Satisfaction

With integrated sales and accounting systems, customer satisfaction improves because customers get faster and more efficient service. Ultimately, the organization realizes greater profitability as internal productivity soars and satisfied customers return again and again.

Robust Integration

Integrations are available for a range of Sage Software products and are suitable for businesses of any size. Smaller organizations may choose Peachtree by Sage or Simply Accounting by Sage. For growing and medium-sized businesses, Sage MAS 90 and MAS 200 ERP, Sage BusinessWorks Accounting, and Sage PFW ERP all offer excellent integration capabilities with ACT! by Sage. The exact feature set will vary but here's a sampling of the kinds of things you can do with integrated systems:

- Synchronize contact information and customize data mapping between ACT! by Sage and Sage Software accounting solutions.
- Eliminate duplicate data entry to save time every day.
- Keep customer information current in both systems automatically.
- Review monthly accounting sales information from within ACT! by Sage.
- Automatically convert contacts to customers and send customer data to your accounting application and avoid redundant data entry.

Create The Win/Win

With an integrated system, everybody wins. Front-office staff have data at their fingertips to quickly answer customer questions. Customers receive faster and more accurate service. Accounting staff is able to eliminate the duplicate work of re-keying customer information and spend less time answering questions from the sales team. Team members have the information they need to be productive in their roles, and relationships between departments inevitably improve because everyone is operating with the same information pertaining to customers and orders.

When executed properly, integration can result in increased productivity and company-wide efficiency. Give us a call to discuss your contact management to accounting integration needs. ☆

ACT! by Sage Grows With Your Company

Sales teams love ACT! by Sage because it gives them the ability to track and close opportunities and manage customer interactions. As your sales team grows, and your contact database along with it, you may become concerned about security and database performance. And with more and more sales professionals working remotely, you may be in need of secure Web-based access to your contact management system.

There's no need to give up the tool your team loves to handle these requirements. You can upgrade your system to ACT! Premium and/or add ACT! Premium for Web.

Scalability

ACT! Premium provides the scalability, centralized administration, advanced security, advanced opportunity tracking, and additional workgroup functionality required to drive your business.

Flexible Security Options

With ACT! Premium you can assign up to five security levels to allow access to data and features depending on user levels. Contact data can be marked as private, and you can limit access to specific users or teams. With field-level security, fields such as addresses or credit cards can be restricted by users/teams and defined as read-only or no access.

Centralized Administration

ACT! Premium can be installed and activated on the server, then deployed right from the server to each individual machine on the network. When setting up users in the database, administrators can utilize the teams function to group users and easily grant contact access by team.

Remote Access Options

For remote or traveling team members, ACT! Premium for Web provides users with access to the central ACT! database via a Web browser, without the requirement of synchronization. Software updates can easily be rolled out to users remotely, and hardware requirements for ACT! Premium for Web are significantly lower.

New ACT! Premium Dual Access provides each user with a copy of ACT! Premium and ACT! Premium for Web for one price. We will write in more detail about this product in an upcoming issue. If it is time to upgrade your system to the next level, give us a call to discuss your options. ☆

Tips & Tricks

Attaching a document to a contact, group, or company in your ACT! by Sage database is simple and a very good way to keep track of important documents. Before attaching the document, it must be saved as a file on your computer.

Start from the Contact Detail, Group Detail, or Company Detail view.

1. Click on the ***Documents*** tab.
2. Right-click in the white area and the shortcut menu will appear.
3. Click ***Add Document***, and the **Attach File** dialog box appears.
4. Browse to and ***Open*** the desired file. The file should now appear in your Documents tab.

A copy of the file is made and stored in the database supplemental files folder so that the attached file will be backed up with the ACT! by Sage database. ☆