



Xact Link for ACT! & MYOB EXO

Features & Benefits

The new MYOB EXO addon for ACT! offers larger organisations a more comprehensive workflow solution for streamlining sales, marketing and accounting information.

ACT! + the Xact MYOB EXO addon combines sales and marketing data about your prospects and customers with important account information – *LIVE*. No synchronisation, no delays. The result is a centralised database that offers a complete view of your contacts, activities, sales opportunities and overall business performance.

Such intuitive integration eliminates errors, delays, manual intervention and additional paperwork typically associated with multiple databases, allowing your staff to focus on what is important – building relationships and getting results.

Current features list (*Phase 1*):

- Import existing MYOB EXO debtor contacts into ACT!
- Link one or multiple act contacts to a debtor contact in MYOB EXO!
- Create debtor accounts and debtor contacts from within ACT!
- Update debtor contact details from ACT!
- View quotes, orders, invoices and payments from ACT!
- Raise and edit quotes from ACT!

The MYOB EXO integration with ACT! is continuously evolving to meet the specific needs of its users. We consider all feedback about how this product can be improved and will continue to add functionality incrementally throughout the life of the product.

Product roadmap:

Future development for the product is listed below; please note this is subject to change:

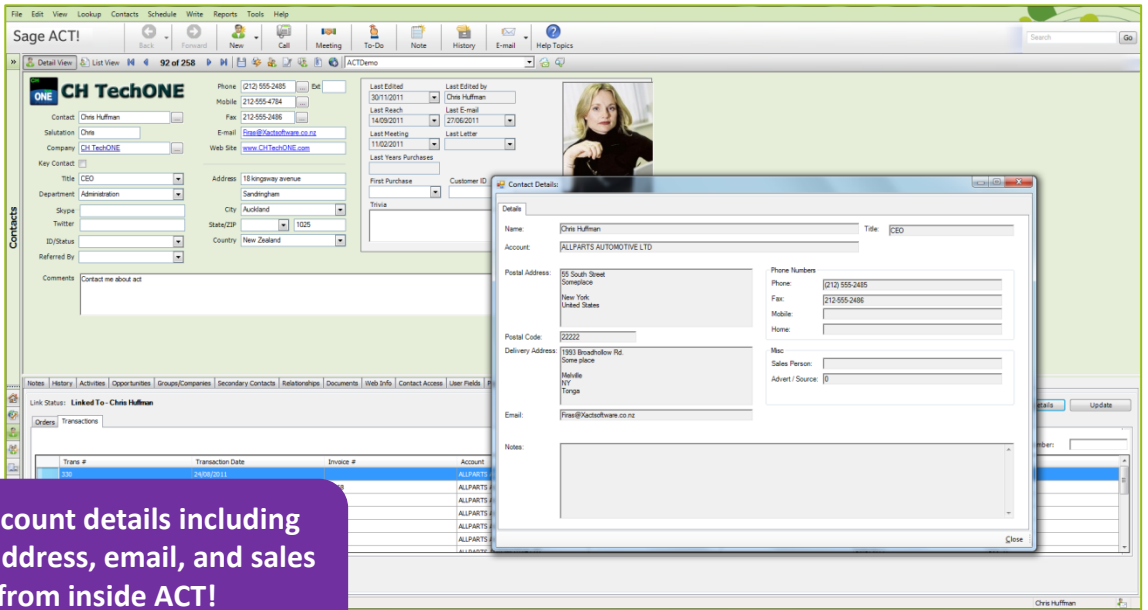
Phase 2:

- Integration with ACT! Opportunities
- Account summary statistics
- User access model

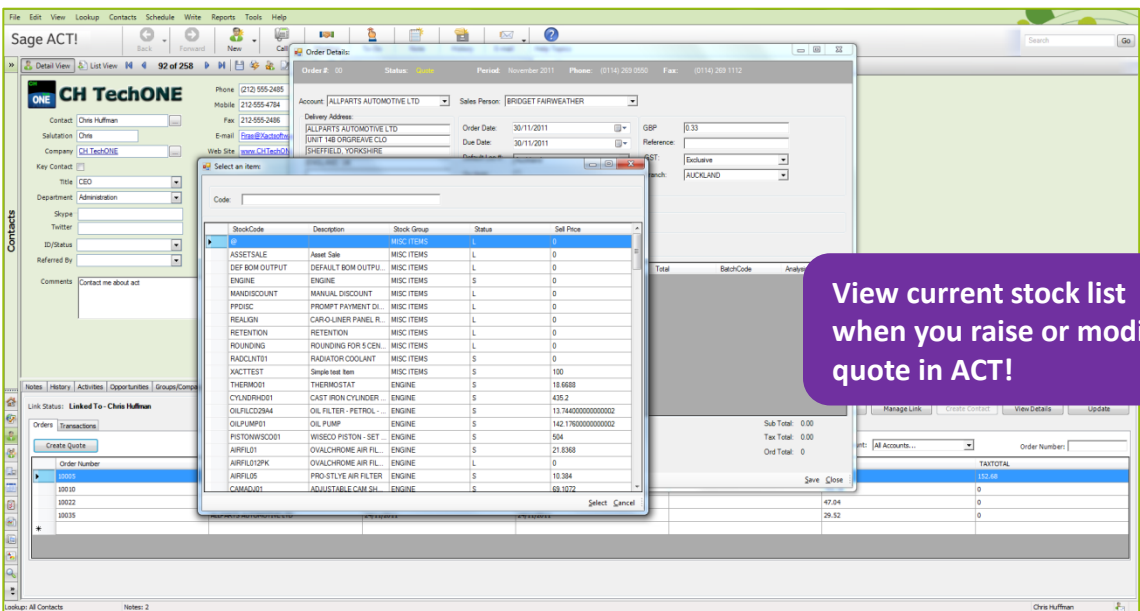
Phase 3:

- Full access to transactional process
- Reporting functionality

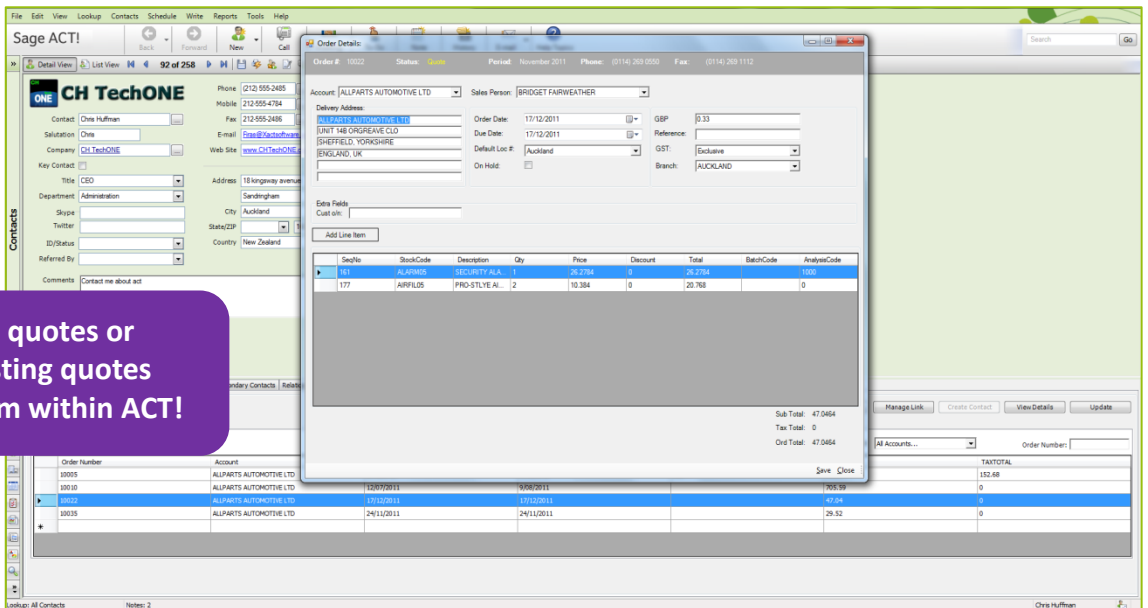




View account details including postal address, email, and sales person from inside ACT!



View current stock list when you raise or modify a quote in ACT!



Create new quotes or modify existing quotes directly from within ACT!