

Linked Systems 2010 for ACT!

Linked Systems 2010 for ACT!® (**Linked Systems**) provides integration between **ACT!® 2010** and Microsoft Dynamics GP® (**Great Plains**). This eighth-generation product provides five major integration points:

- **Look up Accounting Data**
- **Order Entry from ACT!**
- **Bi-directional synchronization**
- **Target Marketing and Promotions**
- **Credit card processing**

ONE CLICK ACCESS FROM ACT!

ADD A GREAT PLAINS TOOLBAR TO ACT!: Linked Systems 2010 adds a customizable toolbar on the left side of ACT! with buttons to synch, look up Great Plains information and enter orders. We can add any button you need to this toolbar.



LOOK UP ACCOUNTING DATA

LOOK UP REAL-TIME INFORMATION: View live Great Plains customer, order, inventory and purchase order information right from ACT!. The information is displayed on another set of tabs just like the ones you're used to seeing in ACT!.

Order Number	Doc ID	Date	Invoice Date	Location Code
ORDST2304	STDORD	3/21/2010		WAREHOUSE
INVSP1005	SPECINV	4/21/2017	4/21/2017	WAREHOUSE

Order Number	Doc ID	Date	Invoice Date	Location Code
INV1020	STDINV	5/10/2014	5/10/2014	WAREHOUSE
INVS3007	SERVINV	9/6/2018	9/6/2018	WAREHOUSE
ORD1007	RIKORD	5/10/2014		WAREHOUSE

REPRINT ORDERS: Easily print and email orders/invoices right from ACT!.

Payment Terms	Net 30
Credit Limit	40000

Type	Date	Due Date	Terms	Age	Salesperson
Sales / Invoices	5/10/2014	6/9/2014	Net 30	587	GREG E.
Sales / Invoices	9/6/2018	10/6/2018	Net 30	-3089	GREG E.
Payments	3/5/2016	1/1/1900		-2174	No
Payments	3/19/2016	1/1/1900		-2188	No

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ORDER ENTRY FROM ACT!

ENTER ORDERS LIVE FROM ACT!: Enter orders and invoices right from ACT!. Orders are added into Sales Order Processing immediately, as if they were entered directly within Great Plains.

Order # ORDST2305 (Astor Suites)

Details | **Items** | Bill To / Ship To | Holds | Notes

Items Ordered

Add Item | Delete Item | Edit Item | View Inventory

Item Number	Description
128 SDRAM	128 meg SDRAM
24X IDE	24x CD-ROM

ENTER ORDERS FASTER: Billto/shipto and other critical information is automatically entered for the user. Users can then focus on entering line items and completing the order.

Order # ORDST2305 (Astor Suites)

Details | Items | **Bill To / Ship To** | Holds | Notes | Dates | User

Billto

Customer ID: ASTORSUI0001

Billto Address ID: PRIMARY

Customer Name: Astor Suites

Contact: Pat Turner

Address 1: 987 West Alaska Ave

Address 2:

Address 3:

City: Gary

Shipto

Req Ship Date:

Shipto Address:

Shipto Name:

Contact:

Address 1:

Address 2:

Address 3:

City:

BI-DIRECTIONAL SYNCHRONIZATION

ELIMINATE DUPLICATE DATA ENTRY: Add customers as needed between ACT! and Great Plains without retyping. Existing customers will be displayed automatically to prevent duplicates from being added to Great Plains.

Link to Great Plains Customer

Customer Link Options

☒ Link to an existing customer ☐ Add customer to Great Plains

Customer #	Customer Name	Address ID	Contact Name	Address 1
ADAMPARK0001	Adam Park Resort	PRIMARY	Roberta Masouras	Suite 9876
ADVANCED0001	Advanced Paper Co.	PRIMARY	Manoj Monat	456 19th Street S.
ADVANCED0002	Advanced Tech Satellite Systems	PRIMARY	Grant Lasko	8765 66 Ave.
ADVANCED0002	Advanced Tech Satellite Systems	WAREHOUSE	Colm Cante	97 48 Ave
ALTONMAN0001	Alton Manufacturing	PRIMARY	Jennifer Rossini	P.O. Box 3343
ALTONMAN0001	Alton Manufacturing	SERVICE	Ron Garland	348 23 East Ave
AMERICAN0001	American Science Museum	PRIMARY	Andrew MacWilliams	789 North Carlton I
AMERICAN0002	American Electrical Contractor	PRIMARY	Sue Almassy-Wicker	3456 North Calumet
AMERICAN0002	American Electrical Contractor	WAREHOUSE	Sid Watts	849 89 Ave E
ASSOCIAT0001	Associated Insurance Company	BILLING	Dmitry Rodin	Box 3849

View All Customers | Search

Ok Cancel

UPDATE ADDRESSES BI-DIRECTIONALLY: Change addresses/info in ACT! and easily update Great Plains or vice versa bi-directionally. Synchronize data via the server or do it interactively on the workstation.

Bi-Directional Synchron

Synchronization Status

One or more fields need synchronization. Select an option for each field and click update

ACT! Record	Great Plains Record (ASTORSUI0001/PRIMARY)
<input checked="" type="checkbox"/> Address 1 987 WEST ALASKA AVE N	<input checked="" type="checkbox"/> Address 1 987 WEST ALASKA AVE
Address 2	Address 2
City GARY	City GARY
Company Name ASTOR SUITES	Name ASTOR SUITES
Contact Name PAT TURNER	Contact PAT TURNER
Country USA	Country USA
FAX (219)555-0116 EXT 0000	Fax (219)555-0116 EXT 0000
<input checked="" type="checkbox"/> Phone 1 (219)555-0116 EXT 0000	<input checked="" type="checkbox"/> Phone 1 (219)555-0116 EXT 0000
State IN	State IN
Zip Code 46401-3455	Zip 46401-3455

Update | Relink customer | Skip changes and Exit

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CREDIT CARD PROCESSING

PROCESS CREDIT CARDS RIGHT FROM ACT!: Authorize credit cards in real-time while entering orders in ACT!. Payments flow through to Nodus Credit Card Advantage or can be used with other credit card processing systems.

The screenshot shows the 'Credit Card Payments' form within the ACT! software interface. The form is titled 'Credit Card Payments' and is part of an order entry screen for Order # 08512277 (Central Distributing). The form contains several input fields for card information: Credit Card (432543654768768), Card Number (4325-4365-4768-768), Card Exp Date (01/09), Card Type (Amex), Name on Card (MICKEY MOUSE), Address (po box 120), and Zip Code (99210-). There is also a section for 'Data to confirm for this call' with fields for CVV2 (1234), Card's Name, and Auth Code. At the bottom of the form, there are buttons for 'Authorize Credit Card', 'Add Credit Card', 'Clear Credit Card', 'Save Order', 'Print', and 'Cancel Order'.

STORE UNLIMITED CREDIT CARDS: Great Plains limits the number of credits you can save to just 1 card! Our product allows you to store unlimited cards per customer.

The screenshot shows the 'Credit Cards for this customer' table within the ACT! software interface. The table has columns for Card Type, Card Number, Exp Date, Name on Card, Billing Address, Notes on Usage, and Customer. The table contains three rows of data:

Card Type	Card Number	Exp Date	Name on Card	Billing Address	Notes on Usage	Customer
Amex	XXXXXXXXXXXX0766	01/09	MICKEY MOUSE	po box 120		CENTRAL
Visa	XXXXXXXXXXXX5645	01/09	James Stoker	1205 1st Avenue		CENTRAL
Master Card	XXXXXXXXXXXX6654	01/10	Frank Smith	Po Box 12344		CENTRAL

At the bottom of the table, there are buttons for 'Add', 'Delete', 'Edit', and 'Columns'.

Contact us to schedule your online demo



www.LinkedSystems.com

info@LinkedSystems.com

(800) 757-2228

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