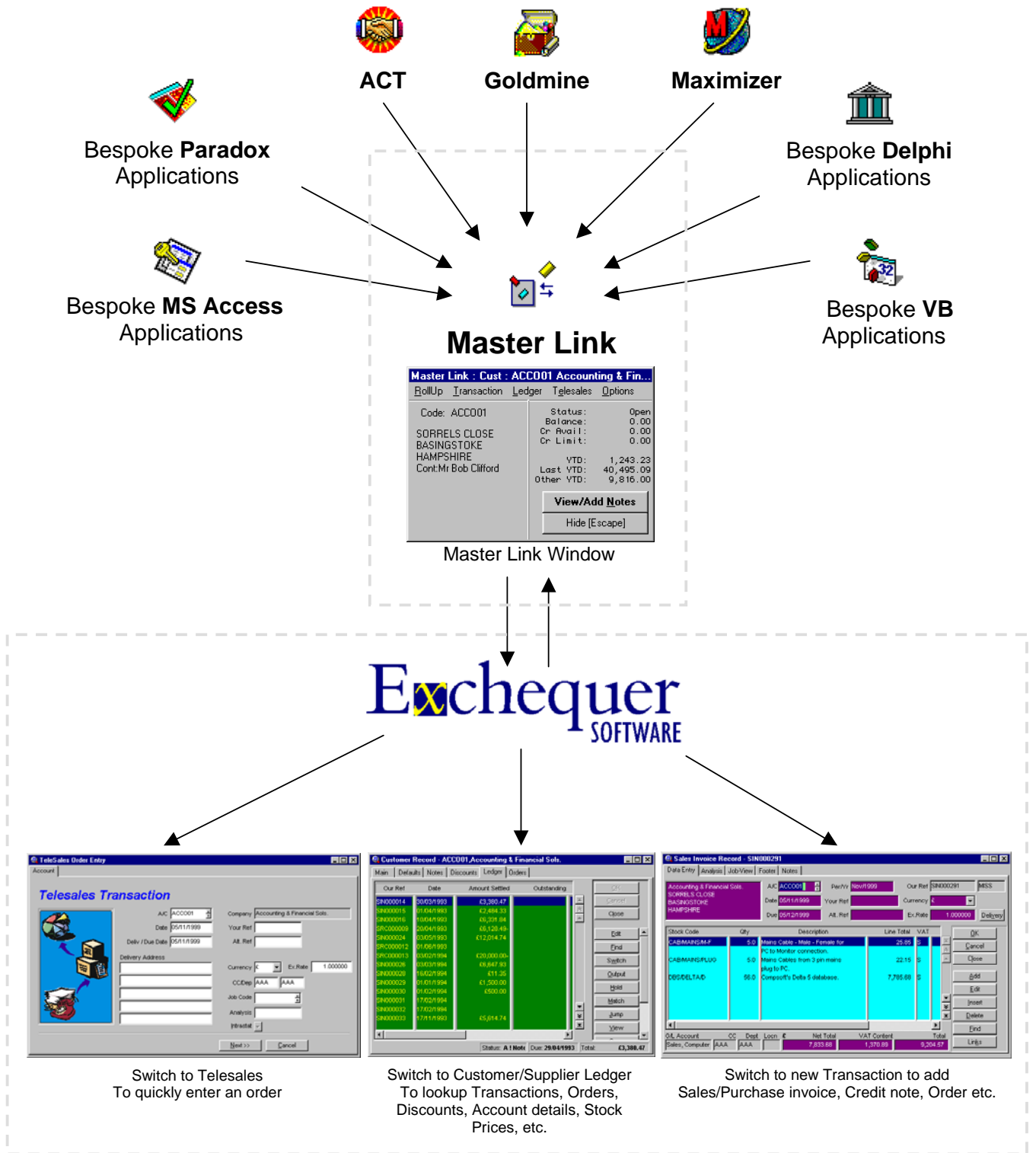


Link Contact Management / Bespoke Software with **Master Link**





Maximzer ACT Goldmine

Contact Management.

Why use contact management software to “enhance” Exchequer Enterprise?

- 1 **Incoming call identification.** Contact software such as ACT can identify an incoming phone call and automatically display the customer/supplier details based on the incoming phone number. Master Link then allows the user to switch to the customer/supplier account in Enterprise or take orders very quickly and efficiently using only a few key strokes.
- 2 Manage Company/Contact relationships
- 3 Define an **unlimited number of user fields** for each contact allows bespoke storage and retrieval
- 4 Track comprehensive contact histories
- 5 Fast entry by post code
- 6 Unlimited notes
- 7 **Manage your schedule**, for meetings appointments, highlighting conflicting resources and appointments phone calls etc.
- 8 Advanced **Scheduling of Telesales calls**
- 9 Forecast sales figures
- 10 Know what was said by whom in you organisation
- 11 Managers overview with delegation and **RSVP reporting when completed**
- 12 **Link e-mails, fax’s and documents** to contact records
- 13 **Synchronise Contact information with remotes sites**, notebook and handheld computers

Advantages for the Individual

Contact management software stores and instantly retrieves details about your contacts and then shares that information with your colleagues. Track sales, opportunities and relationships effortlessly. Use definable fields, screens, unlimited notes and detailed histories for all your information needs. Whether you work at the centre, branch office or on your own it organises every facet of your working day. Both ACT & Goldmine have built in Remote Synchronisation, you can stay up to date with your team regardless of where you are working. Perhaps the ultimate selling tools.

Advantages for the Team

The system gives the sales and marketing team the tools to succeed. Built for workgroups, it automates networked or distributed groups of people into effective, efficient teams. It allows every member of the team to keep abreast of every scrap of up to the minute information. The systems organises, automates and reports on the relationships they are tracking and allows you to delegate tasks effortlessly (there’s even an RSVP notification which informs you when a task is done) and to maintain control with multi-level, network security. Keeping everyone “in the loop” has never been so easy.

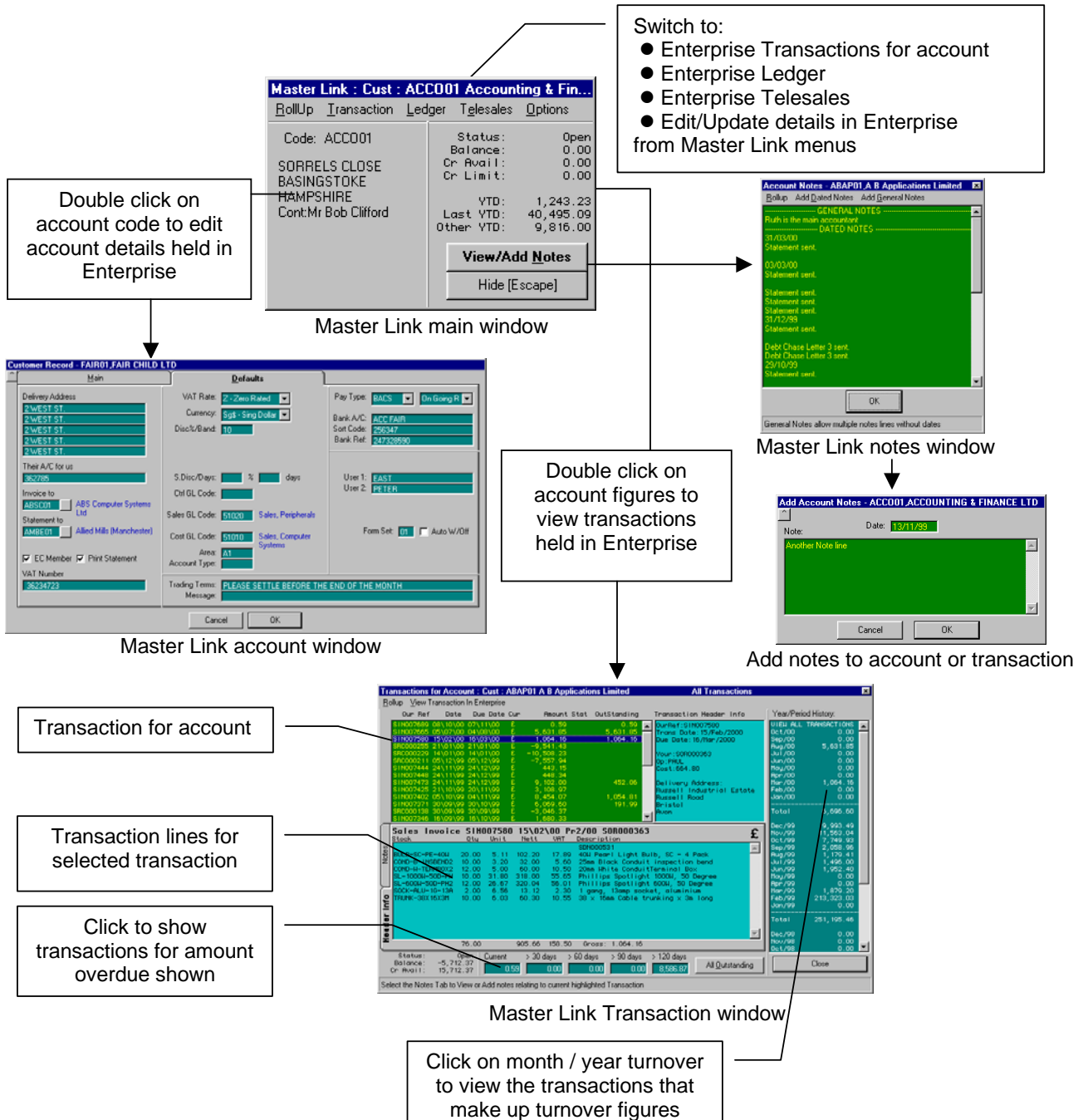
Advantages for the Company

A Contacts Management Database provides a customer/prospect management solution that’s simple to set up and easy to use, but flexible enough that you’ll never outgrow it. Systems can provide sales forecasting, Lead Analysis, Opportunity Management, complete customer service tracking and the ability to scale to any SQL database. From headquarters, to the branch office and all the way down to the staff on the road-no matter where, no matter when – with Contacts Management software everyone works to turn each contact into a customer and each customer into a client for life.



Master Link

Master Link synchronises Customer/Supplier account information within Exchequer with a Contact management database or Bespoke Application. A field is assigned in the Contacts Database or Bespoke Application to record the Exchequer Account code. Master Link reads this Account code and looks it up in the Exchequer Database. It then displays the Account address, status, YTD figure and present balance:



Check out the ScreenCam Demos on the Showcase CD-ROM where you see this icon Run Start.exe on Showcase CD-ROM to display installation and ScreenCam (Training Video's) menu

Master Link - Enterprise Version

Following the success of Master Link, a new enhanced version has been released - "Enterprise Version".

Features of the Enterprise version

1. **CRM Integration from within Exchequer Enterprise.** Please see following pages.
2. **View Credit Control/Outstanding Invoices and Order information.**
3. **View Outstanding Order Items.** Report also shows back-to-back information (ODBC required).
4. **Info screen shows date of last Invoice, Order, Quotation and the date of the oldest Outstanding Order.**
5. **Info screen shows if the account has Outstanding Invoices.** Allows drill down to summary and then outstanding transactions.
6. **Info screen shows if the Customer has active Jobs** within Exchequer Job Costing. Allows drill down to show Job record, Job notes, actual and budget figures (ODBC required). You can also drill down into the Job Analysis codes displayed to show the Transactions.
7. **View Stock Price and Stock Level.** Shows the Stock price after discount has been applied and the stock level for each location.
8. **View Turnover analysis.** Allows the user to quickly see the spend trend of the customer by Stock code, GL code, Cost Centre, Department, Job code, Job Analysis code or Transaction line user field codes.
9. **User Security.** Each user must login using their Exchequer user name and password.
10. **Restricted Access.** Users only have access to accounts for which they are responsible. For example, only allow access where User 1 = "SAM" in each account record.
11. **Default Account Values.** Each user can have default codes for each account set-up e.g. Sales GL = 5010, Area = "SA".
12. **Hide account fields** when editing account using Master Link.
13. **Enforce account field** entry when editing account using Master Link.
14. **Default Transaction values*** when entering a transaction from Master Link, for transaction Header fields. e.g. Alt Ref = "SAM".
15. Allow multiple delivery contact in Act, Goldmine, Maximizer, etc. to be booked to a single account in Exchequer Enterprise. The delivery address on the transaction will be updated. (Note a separate account must be set-up for each user on the system).
16. User Set-up window to allow these settings to be easily managed and copied to other users.

*- Only when created by Master Link.

Master Link – Enterprise Version Features



Master Link Enterprise version displays extra information at the bottom of the main window.

Visit : www.ComTekAccounts.com for the latest prices, information, Support Q/A and downloads.



The user can click on the displayed information to drill down to more detailed information.

Master Link : Cust : ABAP01 A B Applications ...

Rollup Trans. Ledger Tele. Info Options

Code: ABAP01 Status: Open
 Russell Industrial Estate Balance: -5,712.37
 Russell Road Cr Avail: 15,712.37
 Bristol Cr Limit: 10,000.00
 BS1 5NH YTD: 5,712.37
 Cont: Mr Thomas Last YTD: 37,650.34
 Phone: 0117 655 8799 Other YTD: 211,654.26
 Fax: 0117 655 8899

View/Add Notes
 Hide [Escape]

Last Invoice : 08/Oct/2000
 Last Order : 03/Oct/2000
 Last Quote : 05/Jul/2000
 Oldest Outstanding Order : 05/Jul/2000

View Jobs
 Total Outstanding £ -438,354.68
 Current >30 >60 >90 >120
 1 0 0 0 438,355

Click on Info menu to view Stock Prices/Level, All Outstanding Invoices, All Outstanding Orders and perform turnover analysis for account. Turnover analysis allows the user to quickly see the spending trend of the customer by Stock code, GL code, Cost Centre, Department, Job code, Job Analysis code or the codes entered on each transaction line

Click to view Invoices, Orders or Quotes

Click to view Outstanding Order Transactions or Items

Click to view Outstanding Invoice summary to show outstanding Transactions

Click on "View Jobs" to see Job record, Notes and Job Analysis figures. See next page

Outstanding Invoice/Orders/Order Items

Master Link allows Outstanding Orders etc. in a resizable grid which can be exported to Excel or printed.

Output to Printer, Html, CSV or Tabs delimited file. Then optionally open in Excel

Change Column and Split properties. Such as Column Order, Colour, Font, Merge values, grid lines, etc.

Save layouts with different column order and styles.

Click on menu to switch to contact in your favourite CRM package

Switch to related information in Exchequer Enterprise. (Orders, Stock records, Jobs and Notes when relevant)

Footers show debt for selected company and whole company

Click on button to view transaction and transaction notes for the line selected transaction. Double clicking on this window allows the user to add notes to transaction.

Debtors : Astra Communications Limited (45,927.53)

Rollup Go to record in ACT Query Output Column Layout View

Companies		Outstanding Transactions (Base Currency)										
Account	Company	Our Ref	Trans Date	Due Date	Cu	Total	Current	>30	>90	>120	Your Ref	
ANDT02	another new	SIN007653	28/06/2000	28/07/2000	£	9,430.06		9,430.06				
ASTR01	Astra Communications Limited	SIN007664	01/01/1998	31/01/1998	£	56.85					56.85 Sam	
		SIN007243	29/07/1999	31/08/1999	FF	265.68					265.68 SDR0001	
		SIN007475	24/11/1999	31/12/1999	FF	12,912.24					12,912.24 SDR0002	
		SIN007594	20/03/2000	30/04/2000	FF	14,771.62					14,771.62 SDR0003	
		SIN007619	Transaction : SIN007594									17,921.14 SDR0004
BEST01	Best Security	SIN007651	20/03/2000	Your Ref: SOR000384	Your Ref: 7882							
BRIT03	British Telecom Plc	SIN007660	FF - Fr Finnc Total: 20,805.10 Margin: 142.711037090205%									4.62 SDR0005
		SIN007659	Nett: 20,805.10 VAT: 0.00 Outstanding: 20,805.10 Cost: 14,578.48									4.76 SDR0006
COBB01	Cobbold Health	SIN007599	Stock Qty Unit Net Description SDR000542									23,920.46 SDR0007
ECHO01	Echo Noise	SIN007604	BAT-1 5RR-RLK	4	37.42	149.68	1.5 v RR Battery (4 pack)				3,654.73 SDR0008	
ELEC01	Electronics World Limited	SIN007528	BEHCDR-BLUE-24V	2	72.62	145.24	Blue Beacon 24v				909.21 SDR0009	
		SIN007542	BEH-960B-12V	2	92.39	184.78	960B Bell, 12 v				5,010.54 SDR0010	
EXCH01	Exchequer Software	SIN007562	CONTTPANEL-8ZON	10	2,032.54	20,325.40	8 Zone control Panel				2,350.00	
		SIN007591	GENERAL NOTES									2,232.50
		SIN007591	31/03/2000	30/04/2000	£	2,232.50					2,232.50	
		SIN007591	31/03/2000	30/04/2000	£	263.08					263.08	
		SIN007591	31/03/2000	30/04/2000	£	45,927.53					45,927.53	
	Company Total					434,404.47	6,107.73	0.00	15,906.02	2.82	912,387.90	

Default Double click on notes to edit

Master Link – Enterprise Version Features >> Credit Control
 Master Link – Enterprise Version Features >> Improving Cash Flow

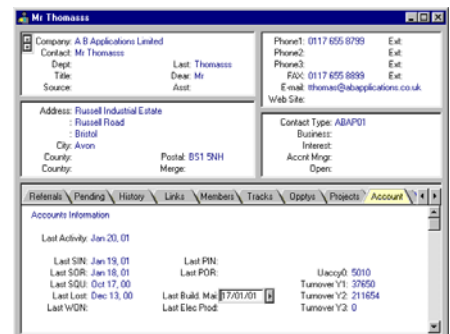
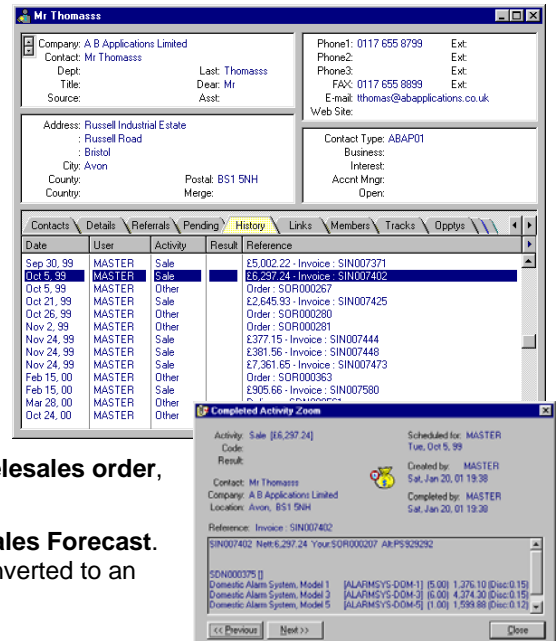


Integration from within Exchequer Enterprise

The enterprise version of Master Link includes functionality to allow a user of Exchequer Enterprise to view/enter CRM information from within Exchequer Enterprise. This program also posts accounts history directly into Goldmine/ACT from Exchequer Enterprise. This allows Goldmine/ACT remote users to view basic account information via Goldmine/ACT Synchronisation.

Features:

- View Contact (Goldmine/ACT) information from within Exchequer's Trader List, allowing:**
 - Schedule follow up calls, very useful for telesales operations.
 - Send messages to other Goldmine users
 - Add notes
 - Create/edit Detail/Contact records
 - Add Contact to Group
 - Add linked document
 - Edit Key 1-5 Fields
 - View Contact / Detail / Referrals / Pending / History / Links / Members Tabs
- Use one button in Goldmine/ACT to take Fast Telesales order, reschedule call and then post result to History.**
- After entering Quotes updates Goldmine/ACT Sales Forecast.** These forecasts are updated as Won/Lost when converted to an invoice within Exchequer.
- Invoices are posted as Sales** into Goldmine/ACT.
- Orders** are posted to Goldmine History (Notes for ACT).
- Posts the Turnover figures** to Goldmine/ACT fields.
- Posts the date of last accounts activity, Invoice, Order, Quote date, for Sales and Purchase side, into user-defined Goldmine/ACT Fields.**
- Triggers can be set-up for General Ledger codes, Cost Centre, Departments or values in Transaction user fields.** When an invoice is raised in Exchequer, fields are updated in Goldmine/ACT with the date of the Transaction. This allows Goldmine/ACT users to filter the data to find:
 - Which Customers have not bought lately for targeting by sales team
 - Which Customers have bought particular types of products or services
 - Who buys a particular product or service but not others
 - Lists Top Customers
 - Plus other possibilities
- Notes can be optionally sent back to Goldmine/ACT when finishing a Transaction.**
- Export all accounts from Exchequer Enterprise to Goldmine/ACT.**
- Export all accounts history from Exchequer Enterprise to Goldmine/ACT.**
- Goldmine Alerts** from within Exchequer Enterprise
- Allow the **capture of Credit Card information** after taking Orders in Exchequer. These are e-mail to CRM user for credit checking before Authorising the Order
- Set-up warnings in Exchequer Enterprise** using Account/Stock General notes.



✚ Not Supported in ACT

Master Link Hook – CRM Information from within Enterprise



Visit : www.ComTekAccounts.com for the latest prices, information, Support Q/A and downloads.

ComTek Accounts

ACT V3/V4/2000

www.symantec.com/act

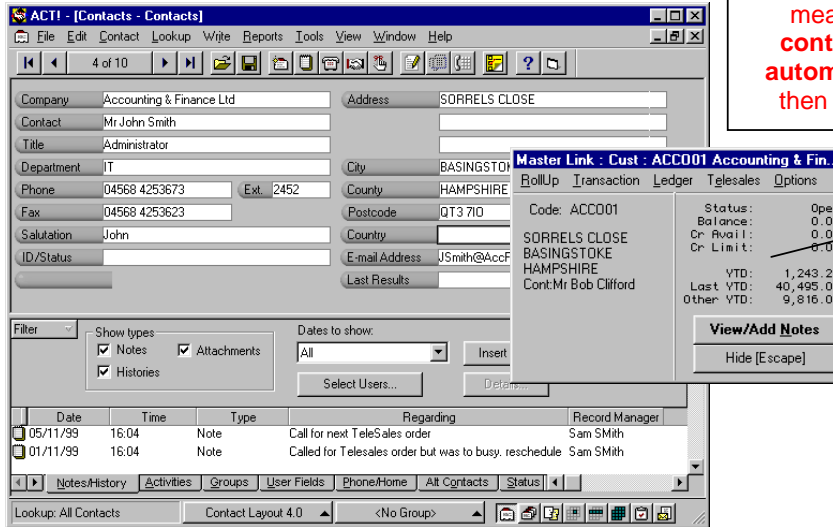
Master Link - ACT Demo's >> General Link with Exchequer
Master Link - ACT Demo's >> Link to Telesales



Execute LinkACT.exe

The user moves to the Contact record, then presses hot key combination or selects ACT customised menu to activate Master Link. Master link then shows Menu Window on top of application. Master Link reads the account information from the current contact displayed. System Set-up is used to map Exchequer fields to ACT fields. Any new account codes assigned are then written back to calling application.

ACT can pull up the contact record using incoming call identification. Which means when the phone rings the contact record can be displayed automatically, only a few key strokes then activate Enterprise Telesales.



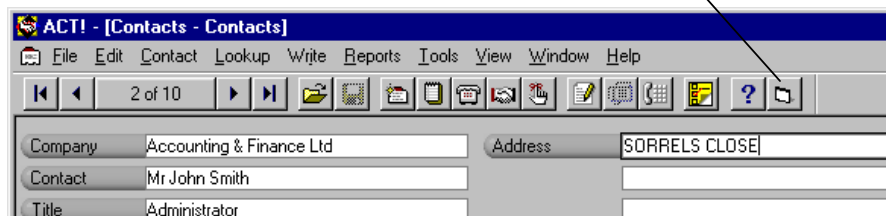
Master Link window displayed on top of ACT. The gateway to Exchequer account information and functionality

ACT Contact Software

To Add Master Link to ACT Menu:

Select Tools >> Toolbars menu and press [Customise] button. Go to the "Commands" tab and name the "Custom Command", to "Master Link", making it run LinkACT.exe and assign menu text "&Master Link". Then select the "Menu" tab and select "Master Link" from the "Commands" list box. Now choose the position for the new menu option and press the [Insert] button.

Master Link added to toolbar in ACT.
or shortcut d + P



Master Link - ACT Demo's >> Adding Master Link To Menu

