Link Contact Management / Bespoke Software
with Master Link

ACT   **Goldmine**   **Maximizer**

Bespoke **Paradox**
Applications

Bespoke **Delphi**
Applications

Bespoke **MS Access**
Applications

Bespoke **VB**
Applications

Master Link

Master Link : Cust : ACC001 Accounting & Fin...
RollUp Transaction Ledger Telesales Options

Code: ACC001	Status: Open
	Balance: 0.00
	Cr Avail: 0.00
SORRELS CLOSE	Cr Limit: 0.00
BASINGSTOKE	
HAMPSHIRE	YTD: 1,243.23
Cont:Mr Bob Clifford	Last YTD: 40,495.09
	Other YTD: 9,816.00

View/Add Notes

Hide [Escape]

Master Link Window

Exchequer SOFTWARE

TeleSales Order Entry
Telesales Transaction

Switch to Telesales
To quickly enter an order

Customer Record - ACC001,Accounting & Financial Sols.

Switch to Customer/Supplier Ledger
To lookup Transactions, Orders,
Discounts, Account details, Stock
Prices, etc.

Sales Invoice Record - SIN000291

Switch to new Transaction to add
Sales/Purchase invoice, Credit note, Order etc.

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 stokes.
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.
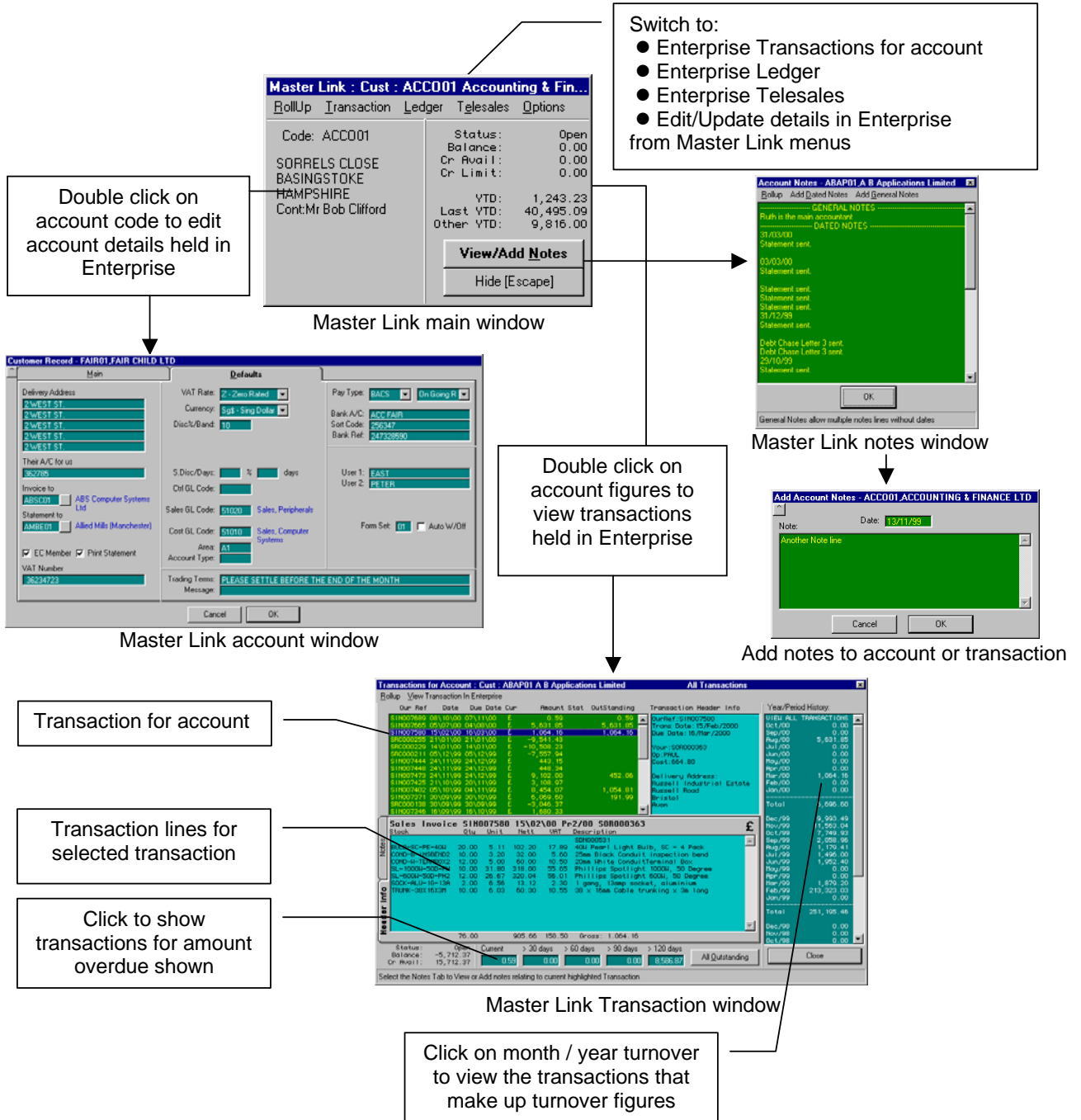
Advantages for the Company

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:

Switch to:
- Enterprise Transactions for account
- Enterprise Ledger
- Enterprise Telesales
- Edit/Update details in Enterprise from Master Link menus

Double click on account code to edit account details held in Enterprise

Master Link main window

Master Link notes window

Double click on account figures to view transactions held in Enterprise

Master Link account window

Add notes to account or transaction

Transaction for account

Transaction lines for selected transaction

Click to show transactions for amount overdue shown

Master Link Transaction window

Click on month / year turnover to view the transactions that make up turnover figures

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

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

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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.

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

Russell Industrial Estate
Russell Road
Bristol
BS1 5NH
Cont:Mr Thomas
Phone:0117 655 8799
Fax: 0117 655 8899

Status: Open
Balance: -5,712.37
Cr Avail: 15,712.37

Cr Limit: 10,000.00
YTD: 5,712.37
Last YTD: 37,650.34
Other YTD: 211,654.26

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

Debtors : Astra Communications Limited   (45,927.53)

RollUp Go to record in ACT Query Output Column Layout View

Companies		Our Ref	Trans Date	Due Date	Cu	Total	Current	>30	>60	>90	>120	Your Ref
Account	Company ▼											
ANOT02	another new	SIN007663	28/06/2000	28/07/2000	£	9,430.06			9,430.06			
ASTR01	Astra	SIN007664	01/01/1998	31/01/1998	£	56.85					56.85	Sam
	Communications Limited	SIN007243	29/07/1999	31/08/1999	FF	265.68					265.68	SOR0001
		SIN007475	24/11/1999	31/12/1999	FF	12,912.24					12,912.24	SOR0002
		SIN007594 ▼	20/03/2000	30/04/2000	FF	14,771.62					14,771.62	SOR0003
		SIN007619	17,921.14	SOR0003								

Transaction : SIN007594
20/03/2000 YourRef:SOR000384 YourRef:7882
FF - Fr Franc Total: 20,805.10 Margin:142.7110370902058
Nett:20,805.10 VAT:0.00 Outstanding:20,805.10 Cost:14,578.48
------------------------------TRANSACTION LINES------------------------------
Stock   Qty   Unit   Nett Description
                                       SDN000542
BAT-1.5AA-ALK   4   37.42   149.68 1.5 v AA Battery (4 pack)
BEACON-BLUE-24U 2   72.62   145.24 Blue Beacon 24v
BELL-960B-12U   2   92.39   184.78 960b Bell, 12 v
CONTTPANEL-8ZON 10 2,032.54 20,325.40 8 Zone control Panel
------------------------------ GENERAL NOTES ------------------------------

BEST01	Best Security											
BRIT03	British Telecom Plc	SIN007660									4.62	SOR0003
		SIN007659									4.76	SOR0003
COBB01	Cobbold Health	SIN007593									23,920.46	SOR0003
ECHO001	Echo Noise	SIN007604									3,654.73	SOR0003
ELEC01	Electronics World Limited	SIN007528									909.21	SOR0003
		SIN007542									5,010.54	SOR0003
EXCH01	Exchequer Software	SIN007562									2,350.00	
		SIN007591	31/03/2000	30/04/2000	£	2,232.50					2,232.50	
		SIN007590	31/03/2000	30/04/2000	£	269.08					269.08	
	Company Total					45,927.53	0.00	0.00	0.00	0.00	45,927.53	
	Total					934,404.47	6,107.73	0.00	15,906.02	2.82	912,387.90	

Default   Double click on notes to edit

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.

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

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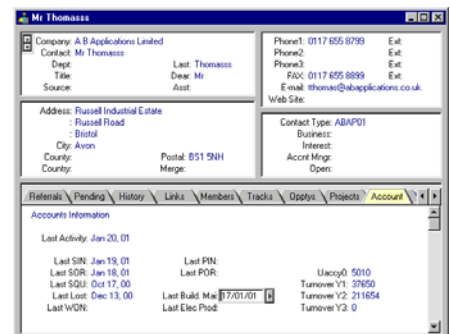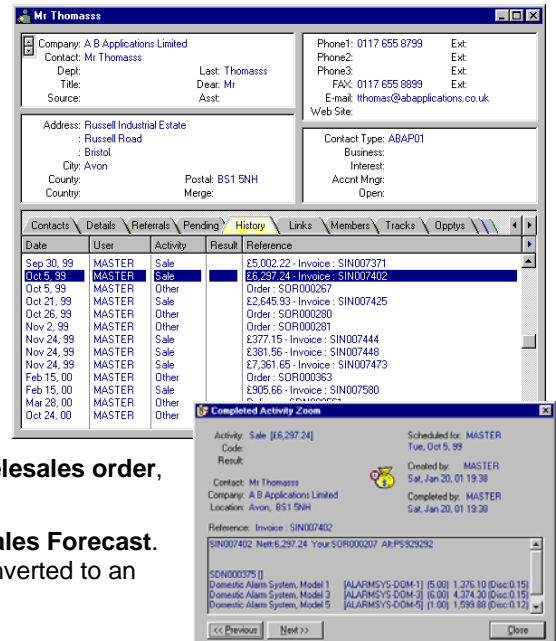
ComTek Accounts

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:

1. **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 ✟

2. **Use one button in Goldmine/ACT to take Fast Telesales order**, reschedule call and then post result to History.

3. **After entering Quotes updates Goldmine/ACT Sales Forecast**. These forecasts are updated as Won/Lost when converted to an invoice within Exchequer.

4. **Invoices are posted as Sales** into Goldmine/ACT.

5. **Orders** are posted to Goldmine History (Notes for ACT).

6. **Posts the Turnover figures** to Goldmine/ACT fields.

7. **Posts the date of last accounts activity**, Invoice, Order, Quote date, for Sales and Purchase side, into user-defined Goldmine/ACT Fields.

8. **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

9. **Notes can be optionally** sent back to Goldmine/ACT when finishing a Transaction.

10. **Export all accounts from Exchequer Enterprise** to Goldmine/ACT.

11. **Export all accounts history from Exchequer Enterprise** to Goldmine/ACT.

12. **Goldmine Alerts** from within Exchequer Enterprise ✟.

13. 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

14. **Set-up warnings in Exchequer Enterprise** using Account/Stock General notes.

✟ Not Supported in ACT

Master Link Hook – CRM Information from within Enterprise

ComTek Accounts

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ACT V3/V4/2000

www.symantec.com/act

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 stokes then activate Enterprise Telesales.
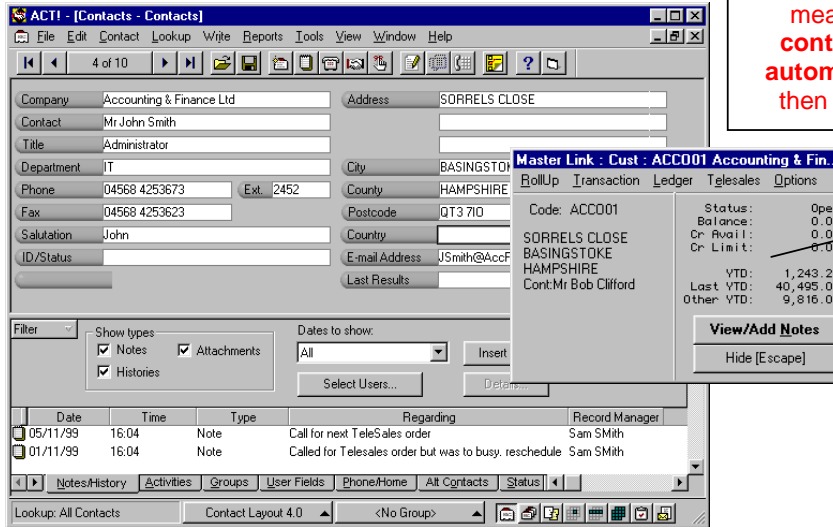
Master Link window displayed on top of ACT. The gateway to Exchequer account information and functionality

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

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🗃️ Goldmine V4/5

Execute LinkGOLD.exe

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

Uses Windows Hot Key to activate Master Link assigned to Goldmine Menu Bar

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

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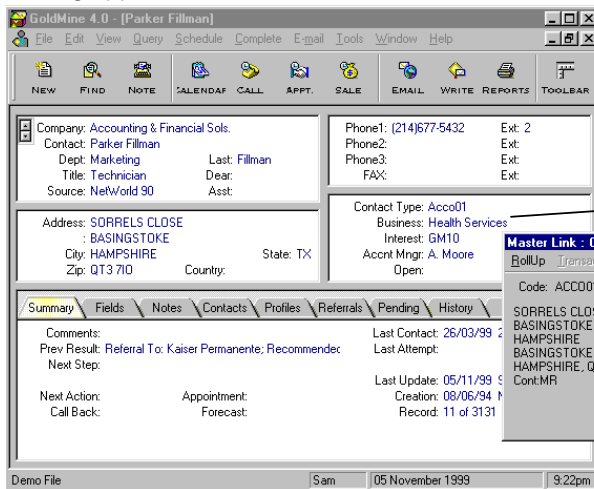
Goldmine can pull up the contact record using incoming call identification. Which means when the phone rings the **contact record can be displayed automatically**, only a few key stokes then activate Enterprise Telesales.

Exchequer account code in Goldmine. When cursor is moved to a field it activates the Master Link window linking Goldmine contact information with Exchequer Customer/Supplier accounts

Master Link window displayed on top of Goldmine. The gateway to Exchequer account information and functionality
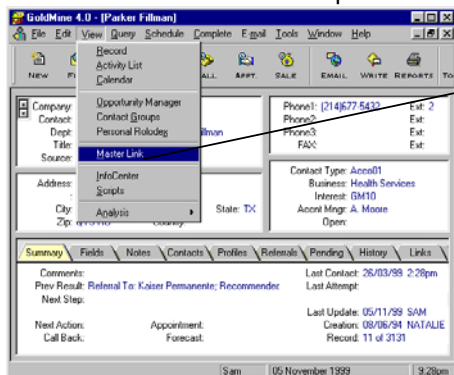
To activate Master Link from Goldmine:

Each users .INI file is edited, found in the Goldmine directory, with the following added to the top:

```
[FileMenu]
Opt1=&Master Link,X:\MLink\LinkGOLD.exe,,3
```

Where Master Link is in X:\Link\ directory (usually located on the network)

This then creates a new menu option:

Master Link added to 'View' menu of Goldmine or shortcut d + Y , P

Master Link - Goldmine Demo's >> Adding Master Link To Menu
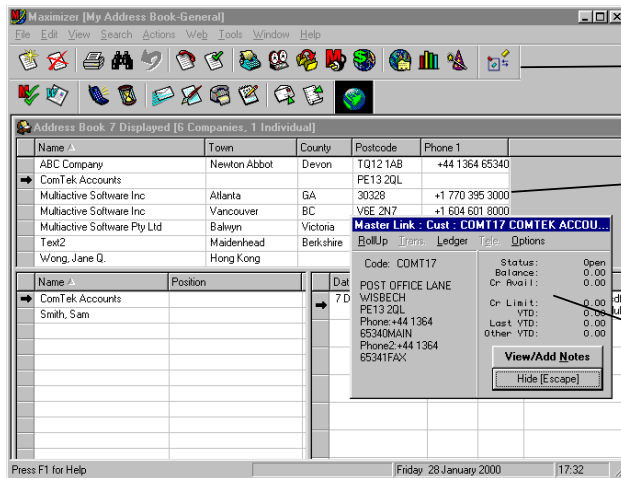
Maximizer V5

Execute LinkMAX.exe

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

Master Link is added to the Maximizer Toolbar and activated from Toolbar.

The user moves to the through contacts (Contact records, appointments, etc.) in Maximizer and Master Link displays the related account information held in Exchequer Enterprise. Master Link can create new accounts from the information supplied in the Maximizer contact record. Once a new account is created in Exchequer the ID for the new account is written back to a user field, called "Exchequer ID" in Maximizer, this code is then used to link from Maximizer to the account in Exchequer.

Maximizer Contact Software

Master Link button on toolbar to activate Master Link window

Exchequer account code in Maximizer user field allows Master Link window to show related account information as the user moves from contact to contact in Maximizer.

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

To Add Master Link to Maximizer

Step 1 Adding 'Exchequer ID' user field

1. From within Maximizer select 'File >> Set-up User-Defined Fields' menu.
2. Then add a new user field called 'Exchequer ID' of type Alphanumeric (length 6). This will enable Master Link to store the Exchequer account ID.

Step 2 Adding Master Link to Toolbar

1. Right click on toolbar and select 'Customize'
2. Select Toolbar to add Master Link to, such as "Custom 1" and press [Properties] button.
3. Then press the [Add] button on the next window. The "Modify Toolbar" window will now allow you to add the Master Link button. Press the browse button […] and find the MLink directory (where Master Link was installed).
4. Double click on the LinkMax.exe program file in this directory.
5. Then press [OK] to close window.
6. Then press [OK] to close window.

Master Link will now work with Maximizer

Bespoke Integration

Execute LinkBesp.exe

Execute LinkBesp.exe to activate Master Link with information supplied by command line

For Linking: Paradox, MS Access, VB, Delphi or any program which will execute an external program with create command line parameters.

For example:
```
LinkBesp.exe /Data:EXAM01|Example Company|MikeSmith|2 Post Offices Lane|Wisbech
```

The user moves the cursor to the Account Code field in application, the application executes LinkBesp.exe to activate Master Link. Master link then shows Menu Window on top of application. The Account information is supplied in the command line of LinkBesp.EXE.

Included as part of the Master Link software is an Example Microsoft Access Database which contains example data for the Enterprise Demo data:

Example Microsoft Access Database

Press to view Master Link window, showing Enterprise data in Master Link window

Press to retrieve credit details for account in Enterprise

Press to view update account details from Enterprise

Credit details read from Enterprise via GetCredit function provided with Master Link

Follow the instructions in the comment field

This database can be found in the Master Link program group of your Windows start bar.

Look at this example to view source code to integrate Master Link to Bespoke applications. Use this example to view code by selecting the View>>Design View menu from within MS Access.

Having selected this, press the [button] button on the tool bar to view the VB code, which calls Master Link and GetCredit.