



Link the following Act!® software:

- **Act! & Act! Pro 2008-2017** (v10.2-19.0)
- **Act! Premium 2008-2017** (v10.2-19.0)
(referred to as "Act!" in this guide)

to the following MYOB® software:

- **MYOB AccountRight** v18.0-19.13
- **MYOB AccountRight Plus** v18.0-19.13
- **MYOB AccountRight Premier** v18.0-19.13
- **MYOB Enterprise** v6.0-19.13
including Standard, Plus, Premier & Enterprise
(referred to as "MYOB" in this guide)

Note for users of MYOB AccountRight Live 2014-2016:

- Please use version 9 of Act! Link for MYOB instead

SETUP GUIDE

Developed for the official Act! product line by



Conditions of Use

The software described in this document is furnished under a license agreement and may be used only in accordance with the terms of the agreement.

Copyright Notice

This publication copyright © 2017 **redonion software**. All Rights Reserved.

Every effort has been made to ensure the accuracy of this manual. However, **redonion software** makes no warranties with respect to this documentation and disclaims any implied warranties of merchantability and fitness for a particular purpose. **redonion software** shall not be liable for any errors or for incidental or consequential damages in connection with the furnishing, performance, or use of this manual or the examples herein. The information in this document is subject to change without notice.

License and Warranty

redonion software licenses the enclosed software to you only upon the condition that you accept all of the terms contained in this license agreement. Please read the terms carefully before attempting to install this software, as attempting to install the software will indicate your assent to them. If you do not agree to these terms, then **redonion software** is unwilling to license the software to you, in which event you should not install or register the software, and you should not purchase a serial number for the software. Payment for a serial number is non-refundable.

The software which accompanies this license (the "Software") is the property of **redonion software** and is protected by copyright law. While **redonion software** continues to own the Software, you will have certain rights to use the Software after your acceptance of this license and payment for a serial number. Except as may be modified by a license addendum which accompanies this license, your rights and obligations with respect to the use of this Software are as follows:

While unregistered, you may use this software only for the purpose of evaluation, and only until the trial period expires, otherwise you must purchase a serial number and register the software. **When registered**, you may use this software on one computer per serial number purchased. Thus if you have purchased only one serial number, then you may use this software on only one computer. You may not reverse engineer, decompile, disassemble, modify, translate, make any attempt to discover the source code of the Software, or create derivative works from the Software.

redonion software makes no warranties with respect to the Software and disclaims any implied warranties of noninfringement, merchantability and fitness for a particular purpose.

redonion software does not warrant that the Software will meet your requirements or that operation of the Software will be uninterrupted or that the Software will be error-free.

Disclaimer of Damages

Regardless of whether any remedy set forth herein fails of its essential purpose, in no event will **redonion software** be liable to you for any special, consequential, indirect or similar damages, including any lost profits or lost data arising out of the use or inability to use the Software even if **redonion software** has been advised of the possibility of such damages. The above limitation or exclusion may not apply to you if not permitted by statutory law. In no case shall **redonion software's** liability exceed the purchase price for the serial number. The disclaimers and limitations set forth above will apply regardless of whether you accept the Software.

This Agreement will be governed by the laws of the state of Western Australia. This Agreement may only be modified by a license addendum which accompanies this license or by written document which has been signed by both you and **redonion software**. Should you have any questions concerning this Agreement, or if you wish to contact **redonion software** for any reason, please write: **redonion software**, 45 Ventnor Avenue, West Perth WA 6005, Australia; or actlink@redonionsoftware.com

Contents

Getting Started	4
Terminology	4
What is Act! Link for MYOB AccountRight?	4
What's New in this Version?	4
Where can I find more information?	5
How many licenses do I need, and why renew them every year?	5
Understanding the Installation Process & System Requirements	5
Is my MYOB data safe?	6
Will my MYOB Backup procedure be affected?	6
Pre-Installation Tasks	6
Installing AFM Server	8
Installing AFM Client	14
Summary Info Fields: Adding fields to the Layout	15
Starting Act! Link for MYOB AccountRight	17
The Trial Period	17
Connecting to the Server	17
Link Matching Cards	18
How does it know which MYOB card to show?	18
Field Mapping	18
Importing MYOB Customers or MYOB Suppliers into Act!	19
Registering AFM Server	20
Understanding Act! Link for MYOB AccountRight	21
Making the most of Act! Link for MYOB AccountRight	21
Troubleshooting	21
Support	21

Getting Started

Terminology

The following abbreviations will be used for the remainder of this guide:

AFM	Act! Link for MYOB AccountRight v7 & 8
Act!	Act! contact management software (versions listed on the front page of this guide)
MYOB	MYOB AccountRight software (versions listed on the front page of this guide)

What is Act! Link for MYOB AccountRight?

New tab in the Contact Detail View:

Act! users will know that the **Act!** Contact Detail View gives you a tab for Notes, History, Activities, Opportunities, and much more. **AFM** adds a new tab to this view which provides the following...

Up-to-the-minute data NOT copied to Act! (read from MYOB, and displayed read-only):

- List **MYOB** quotes/orders/invoices for a Customer/Supplier, status, date range, item/keyword.
- See the total quoted, ordered/invoiced, paid & outstanding for the above list.
- See 30/60/90-day aged receivables at a glance for **MYOB** Customers & Suppliers.
- View **MYOB** Credit Limit, Account Balance & Credit Hold flag for Customers & Suppliers.
- View, Print or export to Excel the **MYOB** quotes/orders/invoices for any Customer.
- View **MYOB** Inventory, stock on hand or committed, and sell price.
- View Charts for **MYOB** Customers & Suppliers showing:
 - Bar Chart of Total Invoiced for each of the Last 12 Months;
 - Pie Chart of Total Invoiced for each of the Top 5 Items.
- Lookup all **Act!** contacts linked to a Customer with quotes/orders/invoices that do or don't:
 - Contain a specific inventory item or keyword (for a date range);
 - Total more/less than a specific amount invoiced (for a date range);
 - Total more/less than a specific amount outstanding (for a date range);
 - Have a specific Invoice Number.
- Note that you can choose which features each **Act!** user has access to.

The Act! Link for MYOB tab also allows you to:

- Link **Act!** contacts to **MYOB** Customer & Supplier cards (separately or in bulk).
- Import **MYOB** Customer & Supplier cards into **Act!** (separately or in bulk).
- Add/Update **MYOB** Customer & Supplier cards from **Act!** (separately or in bulk).
- Link **Act!** Contacts to matching **Act!** Company records & create them if they don't exist.
- Import **MYOB** Products into the **Act!** Opportunity Product List.
- Create **MYOB** Quotes, Orders & Invoices from an **Act!** Opportunity or from scratch.
- Create **Act!** Opportunities from **MYOB** Quotes, Orders & Invoices.

Automated Processes:

In addition to the new tab above, **AFM** also provides a background service which can:

- Store a summary of the **MYOB** Customer Sales data in **Act!** contact fields for better viewing, searches, mail merge, reports, Dynamic Groups & Smart Tasks in **Act!**, as well as for e-marketing (eg. via www.swiftpage.com); synchronising to mobile devices (eg. via www.handheldcontact.com); or text messaging (eg. via www.sms4act.com). Summary Info Field updates* can be scheduled as often as every minute or once a day, or something in between. This data can include First/Last Sale date; First/Last Salesperson; the total Invoiced, Paid & Outstanding for various periods (eg by month, quarter, financial year, or grand total).
- Link **Act!** contacts to matching **MYOB** Customers & Suppliers.
- Import any unlinked **MYOB** Customers & Suppliers.
- Link **Act!** Contacts to matching **Act!** Company records & create them if they don't exist.

What's New in this Version?

This version adds the following new features:

- Support for the latest Act! version
- Note that v8 is for **Act!** 2013 (v15) or newer; v7 is for previous Act! versions
- Want more? Request a feature on actlink@redonionsoftware.com

Where can I find more information?

Product updates, news & support are available on our website: www.redonionsoftware.com

How many licenses do I need, and do I need to renew them every year?

You will need a license for each Act! username that needs to use the link. You can reassign a license from one user to another at any time. You do NOT need to purchase a license for the server component. A license is a 12-month subscription. The software will prompt you 30 days before expiry to purchase a new 12-month subscription. The subscription includes:

- Use of the Act! Link for MYOB tab and the automated server processes to sync Act! & MYOB;
- Maintain compatibility with ongoing upgrades from Act! & MYOB;
- Benefit from improvements in future versions (usually released every 3 months);
- Free telephone support & remote assistance.

Understanding the Installation Process & System Requirements

This version of **AFM** has two components:

- **AFM Client** must be installed on each computer on which you wish to use **AFM** functionality.
- **AFM Server*** must be installed on the same computer that holds your **MYOB** data file.

* This can be **EITHER** the Desktop Server **OR** the Enterprise Server. Do NOT install both.

If the computer holding the **MYOB** data file is an unattended server, then you should use the *AFM Enterprise Server* (windows service). Otherwise it is a computer used by someone as their workstation, in which case, you should use the *AFM Desktop Server* (system tray icon).

If your **MYOB** data file is stored on the same computer on which you wish to use **AFM** functionality, then you may install both **AFM Server** and **AFM Client** on the same computer. All **MYOB** users must access the data file in TCP/IP mode only (selected when logging into **MYOB**).

AFM Client communicates with **AFM Server** via a HTTP port. The default port is 65200, and this can be changed using the Server Administrator window. You must have Internet Protocol (TCP/IP) enabled (on by default), and ensure that it is not blocked by Windows Firewall, or other firewall software, even if you install both components on a single computer.

AFM Server requires a compatible version of **MYOB** & **Act!** installed on the same computer (see cover page); and the appropriate version of MYOB ODBC Direct for that version of MYOB. This is automatically installed when you install MYOB. You must meet the recommended requirements of the above software. We also suggest that you disable User Account Control on Windows 7, 2008 & Vista.

V7 requires "Microsoft .NET Framework 3.5 SP1" to be installed. V8 requires "Microsoft .NET Framework 4.0" to be installed. Most Windows computers will have already downloaded & installed this component automatically, as it is a requirement of Act!

AFM Client requires a compatible version of **Act!** installed on the same computer (see cover page); and you must meet the recommended requirements for that software, including at least 1Gb RAM.

No sample **Act!** database is supplied with the Link. You may use your own **Act!** database (please backup first) or the sample database provided with your **Act!** software.

eg. My Documents\ACT\ACT for Windows 12\Databases\ACT2010demo.pad; or
My Documents\ACT\ACT Data\Databases\ACT2011demo.pad

The database must have Number-type fields named "MYOB Customer Card ID" and "MYOB Supplier Card ID", however these fields can be created with a single click in the Server Administrator window. The field names are case-sensitive. They do NOT require dropdowns & do NOT need to be added to your **Act!** layout.

No sample MYOB data file is supplied with the Link. You can trial the link using the sample data file provided with your *MYOB Application* (eg. C:\Premier19\Clearwtr.myo or C:\MYOB19\Clearwtr.myo). However before you use your own data file, please back it up first.

To use either a trial or paid version of the Link you must register the Link via the Internet.

Therefore you must have Internet access from the computer where you install AFM Server.

Is my MYOB data safe?

Yes. A password can be required each time an attempt is made to connect to the MYOB data.

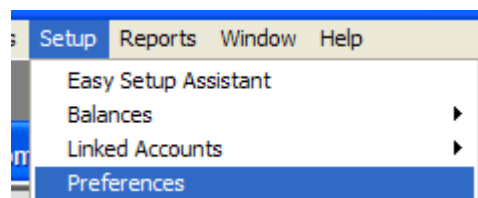
Will my MYOB Backup procedure be affected?

No. AFM only connects to your MYOB data file for a moment when reading or writing, so you are not required to stop & start the service to perform a backup.

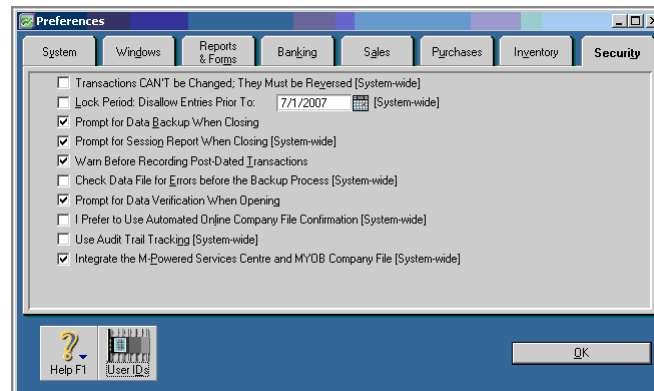
Pre-Installation Tasks

The Act! Link for MYOB comes with 2 components: AFM Server (Desktop or Enterprise), and AFM Client. The AFM **Server** component will need to be installed on the machine that hosts the MYOB database. The AFM **Client** component will need to be installed on the machine that you will be using Act! on (Note: this may be the same machine).

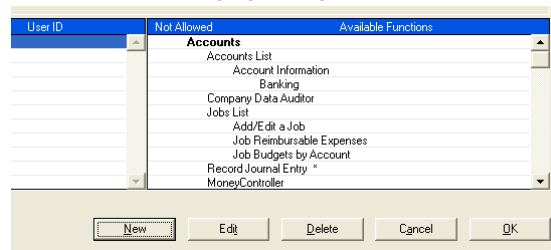
1. If the MYOB data file is located on this computer, you will need to install the AFM Server component. Ensure that you have **MYOB** installed & meet the recommended requirements.
2. If you wish to use the AFM functionality on this computer you will need to install the AFM Client component. You should have **Act!** installed & meet the recommended minimum requirements.
3. You will also need to create a separate username in your MYOB data file for the link to use. Log into MYOB as "Administrator", while no one else is accessing it, and click "Preferences" on the Setup menu.



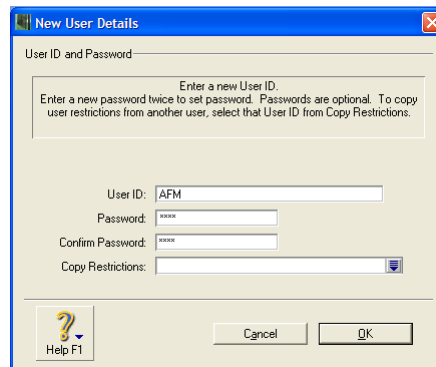
Click the "Security" tab and click "User IDs"



Click "New"



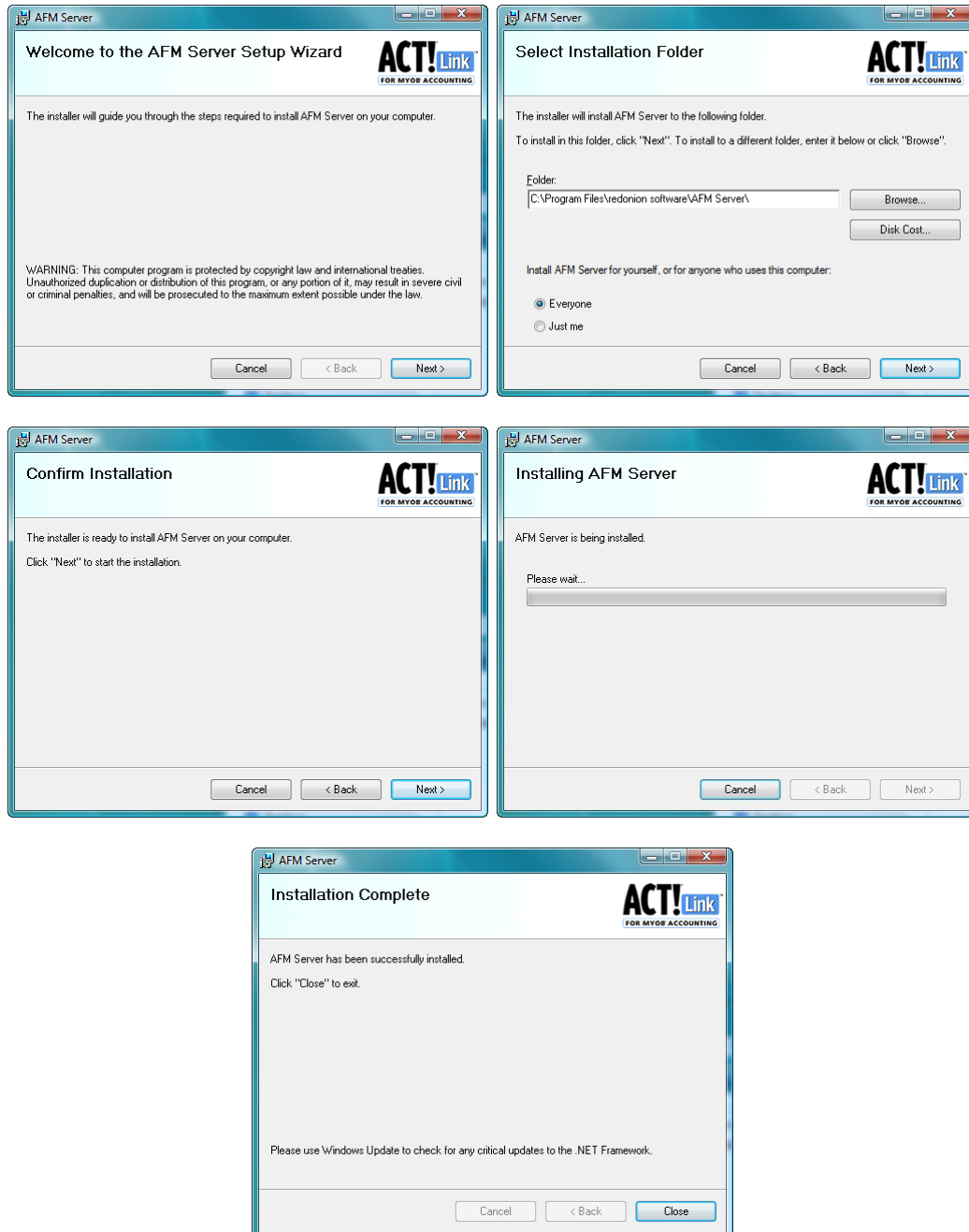
Call the user "AFM" and create a new secret password. Then click OK, OK & OK.



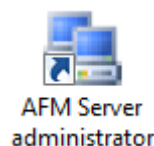
- For Windows Vista, Windows 7, and Server 2008 you may need to disable User Account Control (UAC) for the AFM Server and/or AFM Client to function correctly. Go to "Control Panel" > "User Accounts" > "User Accounts" again if required > "Turn User Account Control on or off" or "Change User Account Control Settings" > Untick the box or move the slider to the lowest setting ("never notify") & click OK > then restart the computer.

Installing AFM Server

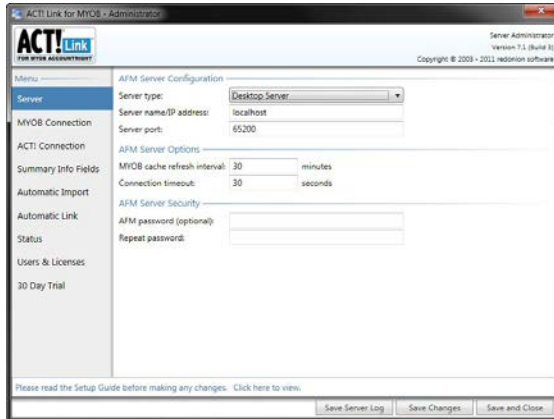
1. **Logon to Windows** as an administrator, and close any unnecessary applications.
2. **Run AFM.DesktopServer.Setup or AFM.EnterpriseServer.Setup** and complete the wizard:



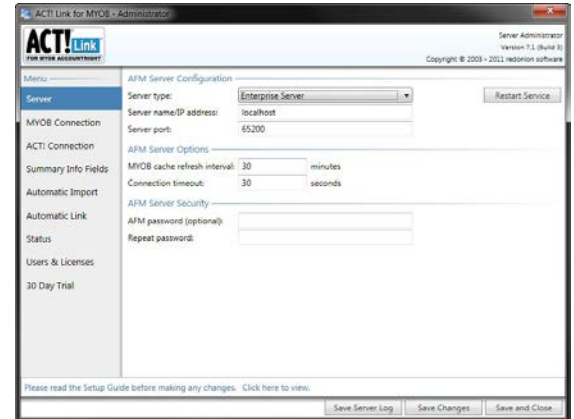
3. Open **AFM Server Administrator** using the desktop icon as shown below, or by running "C:\Program Files\redonion software\AFM Enterprise Server\AFMServerAdmin.exe"; or "C:\Program Files\redonion software\AFM Desktop Server\AFMServerAdmin.exe".



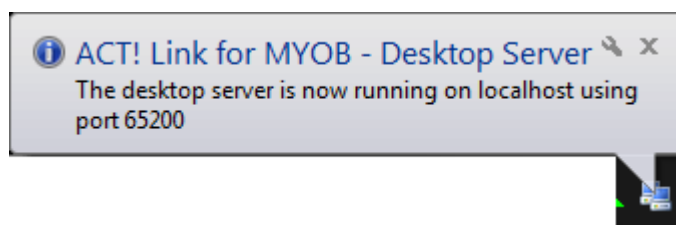
- The following window appears. The column on the left hand side provides access to the eight separate pages of this window. The first page is "Server". Select which server module you installed. You may leave the other values as they are, unless troubleshooting a networking or hardware performance issue.



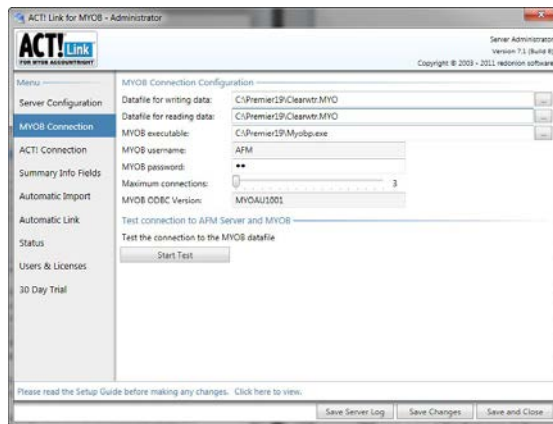
or



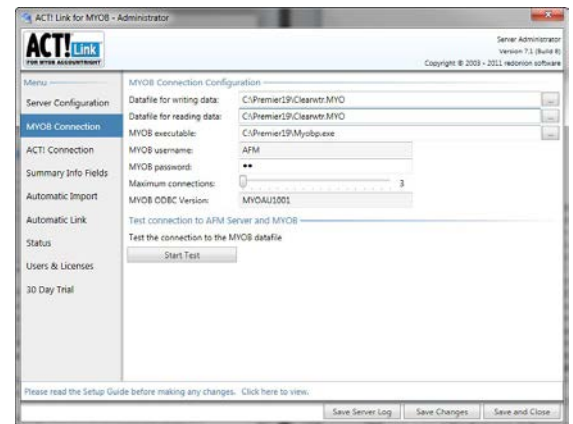
- To reduce the load on your server & MYOB data file, and therefore increase the performance of your server & MYOB application, AFM Server retrieves data from MYOB periodically & stores the data in memory for the AFM Client to access (even while the MYOB administrator has the data file locked for certain tasks). You can change the MYOB cache refresh interval here to suit your hardware, data file size, and how up-to-date you want the AFM Client to be. You can also force the server to refresh at any time from the Act! Link for MYOB tab.
- If you wish to restrict which people can use **AFM** on your network, think of a new password, and enter it next to "AFM password" & again next to "Repeat password" on the next line. **AFM Client** users must enter this password each time they connect to the **AFM Server**. You can also limit access by Act! username.
- You now need to start the service for the first time. If you installed the Enterprise Server, click the Restart Service button shown above. If you installed the Desktop Server, go to your desktop, and double-click the AFM Desktop Server shortcut (or restart your computer).



- Now select the second page of the AFM Server Administrator, called "MYOB Connection".



or



9. Enter the path to the **Data file** for writing data: If you are NOT using MYOB Premier or MYOB Enterprise, then you have a single-user version of MYOB. Use a local path to the data file, eg. C:\MYOB18\Cleartwtr.myo. With the single-user version of MYOB, although the link should be able to read the data file at any time, the link will NOT be able to write to the data file while someone has the same data file open in MYOB. **Note that the link should have no problem writing to the data file while no one else has it open in MYOB.**

If you ARE using MYOB Premier or MYOB Enterprise, then you have a multi-user version of MYOB, so you can avoid the limitation described above. However in order to do so, you must either:

- If the data file is on a workstation, use the Desktop Server, and have the data file open in MYOB on that workstation to allow the link to write to the data file while other users are accessing it (Note: use a **local** path to the data file); **or**
- If the data file is on a server; use the Enterprise Server, and use a **network (UNC)** path to your data file to allow the link to write to the data file while other users are accessing it. You must first share the folder containing your MYOB data file for at least the current windows user (eg. "Administrator") and the local system account (ie "SYSTEM"), and ensure that these two user accounts have full control permission to the folder. You may need your system administrator or IT consultant to assist. Then enter the path to the data file as
[\\servername\sharedfoldername\data filename.myo](#)
eg [\\SERVER\PREMIER19\Cleartwtr.myo](#)

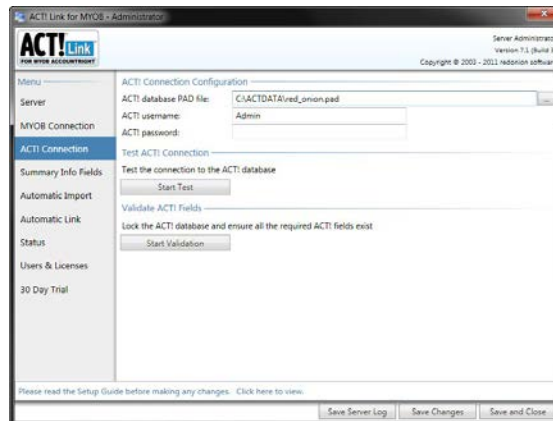
You can trial AFM with the "Cleartwtr" sample data file, however if you wish to use your own data file, please back it up first.

10. Enter the path to the **Data file** for reading data. This must be the same file as the one used for writing data, but it cannot be a UNC path. So if you used a local path to write data, just copy the same path for reading data. However if you used a UNC path for writing data, you must enter the local path for reading data, eg. C:\PREMIER19\Cleartwtr.myo
11. Enter the path to the **MYOB executable** (MYOB.EXE or MYOBP.EXE - must be on a local drive, where the MYOB application was installed – not just a copy of the file).
12. Enter the **MYOB password** that you created for the AFM user account in MYOB. Note that you cannot use a different MYOB user name.
13. The **Maximum Connections** value is CRITICAL. If AFM Server attempts to write to MYOB when all MYOB licenses are already in use, MYOB ODBC Direct may freeze & you may need to reboot the server to recover. Therefore AFM Server will check that the number of users logged into MYOB is less than the value in Maximum Connections, before attempting to write to your data file. If all MYOB licenses are in use, the Act! user will be asked to try again

later. This must be set to the number of MYOB licenses you have. If you have MYOB AccountRight or Accounting Plus, this must be set to 1. If you have MYOB Premier you should set this to 3, unless you have purchased additional MYOB licenses, in which case you should increment this value for each additional license purchased.

14. Click **Start Test** to test the connection. If this fails, see the last page of this guide.

15. Now select the third page of the AFM Server Administrator, called "Act! Connection".

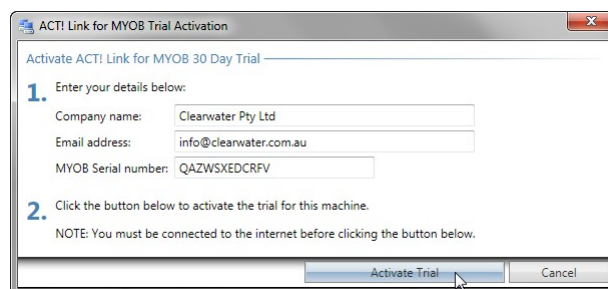


16. The Act! database PAD file must be located on a local drive. If your **Act!** database is located on a different computer, copy the PAD file to this computer. Then browse to and select the PAD file, and enter the username & password of an **Act! Administrator**.

17. Click Start Test to test the connection the Act! database. When that is successful, arrange for all users to log out of the Act! database, and click Start Validation to add the required fields (ie. MYOB Customer Card ID & MYOB Supplier Card ID) to the Act! database.

18. Skip the next three pages of the AFM Server Administrator for now, as these will be disabled until you add a license to the "Users & Licenses page".

19. If you have not yet purchased a license for this link, select the last page of the AFM Server Administrator, called "30 Day Trial", and then click "Activate Trial" and fill out the form below (to allow the AFM Client module to connect to the service). Otherwise see the end of this guide for instructions on entering your serial number.



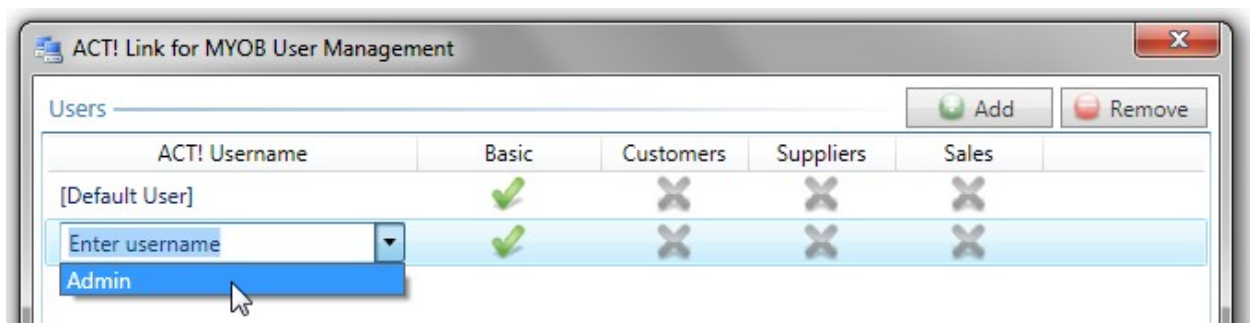
20. Select the eighth page of the AFM Server Administrator window, called "Users & Licenses".

21. Click "User Permissions" to choose which Act! Link for MYOB functions will be available to each Act! username. First, use the tickboxes to set the default permissions that will be assigned to all Act! usernames until otherwise specified:

Permissions

- ☒ **Basic** Connect, Link Customers, View Customer Sales and View Inventory
- ☐ **Customers** Add/Update Customers into MYOB, Run Batch Add/Update Customers and Import Customers into ACT!
- ☐ **Suppliers** Link Suppliers and View Supplier Purchases
- ☐ **Sales** Add Quotes, Orders, Invoices into MYOB and Import MYOB products into ACT!

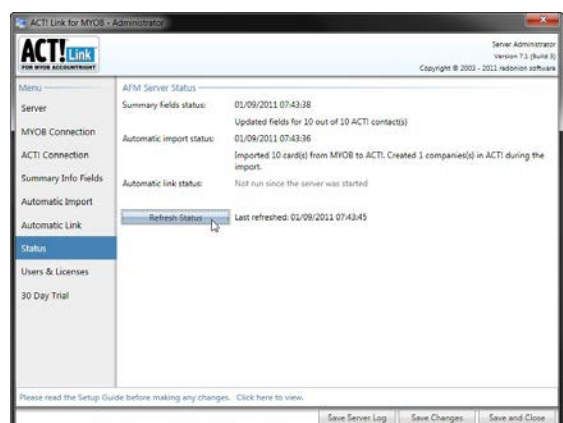
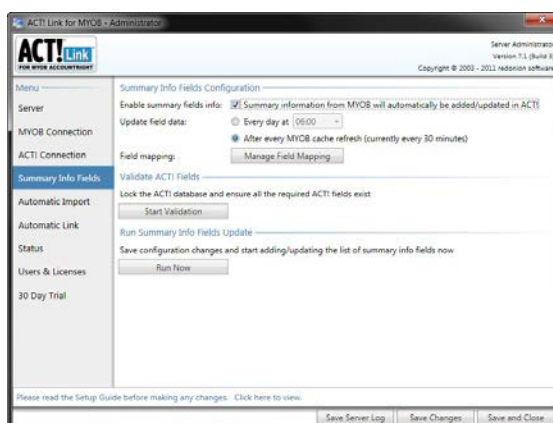
22. Then if required, click Add to specify different permissions for a particular Act! username:



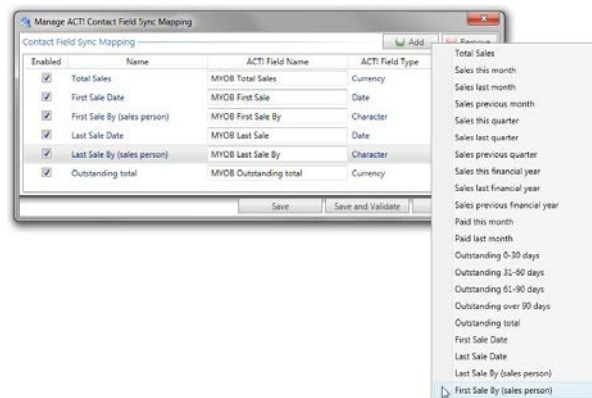
23. Select the required Act! username from the dropdown menu, and use the tickboxes at the bottom of the window again (from the previous step) to set the permissions for that Act! username. You can always edit these permissions later by selecting the appropriate row in this list, and using the tickboxes to change the permissions. Click Close when finished.

24. If you would like the link to automatically update some Act! contact fields with MYOB data, select the fourth page called "Summary Info Fields", tick "Enable summary fields info", choose how often you want the fields updated, and then click "Manage Field Mapping". Once you click Save Changes, this process will be automated. If you wish to run the process immediately, click Run Now. After a moment, you can view the result on the Status page.

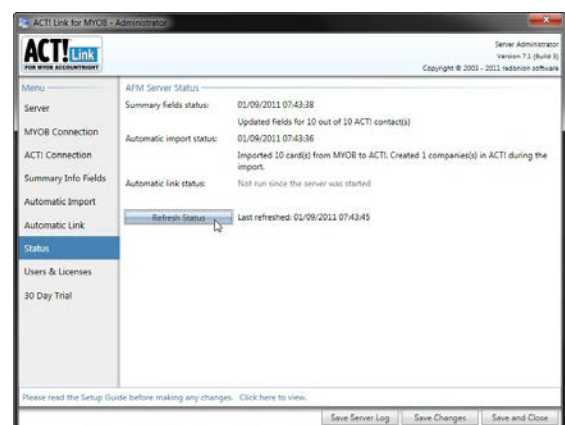
Please note that this function is not available in Trial Mode, and will be disabled if your licenses expire. If your licenses are due to expire within 30 days, you will receive notification each time you click the Connect button in the Act! Link for MYOB tab, so that you can renew them (from an Act! Certified Consultant or www.redonionsoftware.com).



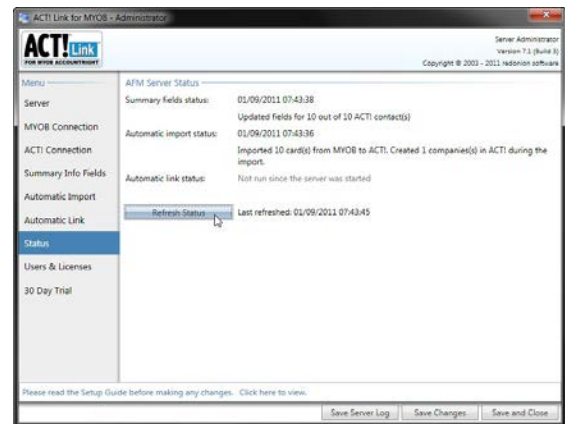
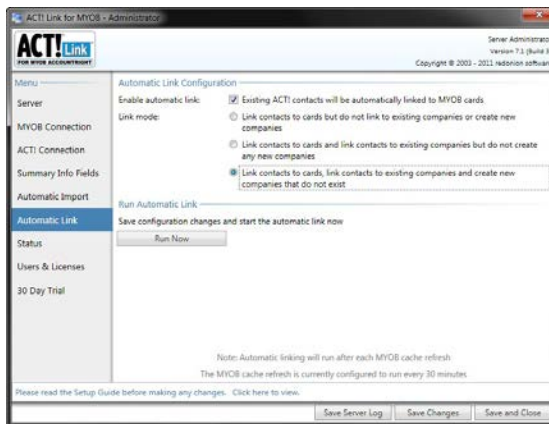
25. Click the Add button & select one of the values that you would like to synchronise to Act!. Repeat this step for other values if you wish. Under Act! Field Name, either leave the default values, or enter the field names you would like to use.



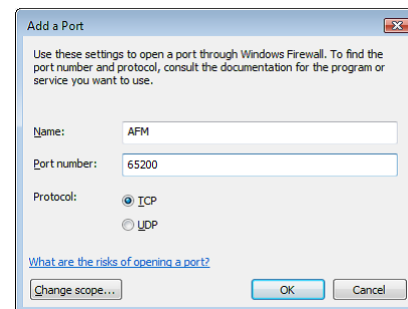
26. Click the Save and Validate button to create these fields in your Act! database if they don't already exist, and apply all of the changes to the service. To populate the Summary Info Fields for the first time, click "Run Now". This will be completed silently, so don't wait for it to indicate that it is finished. If troubleshooting, check its progress on the Status page. Later in this guide we explain how to add these new fields to your Act! screen layout.
27. If you would like the link to automatically import MYOB cards into Act!, then select the fifth page called "Automatic Import", and tick the box to enable this function. You can also choose to have imported Act! contacts linked to existing Act! company records, and/or create Act! Company records that don't exist for these contacts. Under Field Overrides, you can tick the box to have the Act! ID/Status field set to "Customer" when importing a MYOB Customer card, and set to "Supplier" when importing a MYOB Supplier card. You can also choose to populate two other Act! contact fields to any value you choose, as shown below. Once you click Save Changes, this process will be automated. If you wish to run the process immediately, click Run Now. After a moment, you can view the result on the Status page.



28. If you would like to link any existing Act! contacts to MYOB cards of the same name, then select the sixth page called "Automatic Link", and tick the box to enable this function. You can also choose to have linked Act! contacts linked to existing Act! company records, and/or create Act! Company records that don't exist for these contacts. Once you click Save Changes, this process will be automated. If you wish to run the process immediately, click Run Now. After a moment, you can view the result on the Status page.

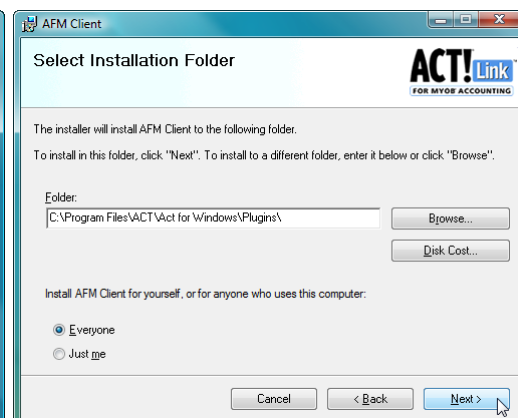
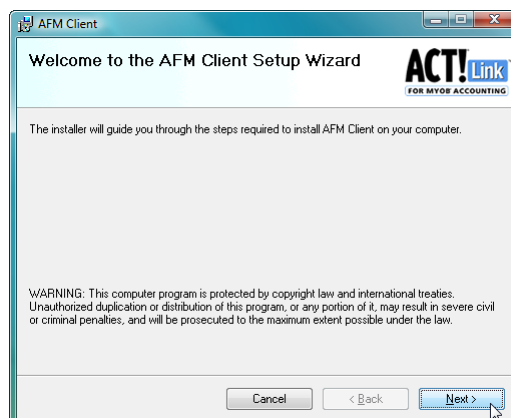


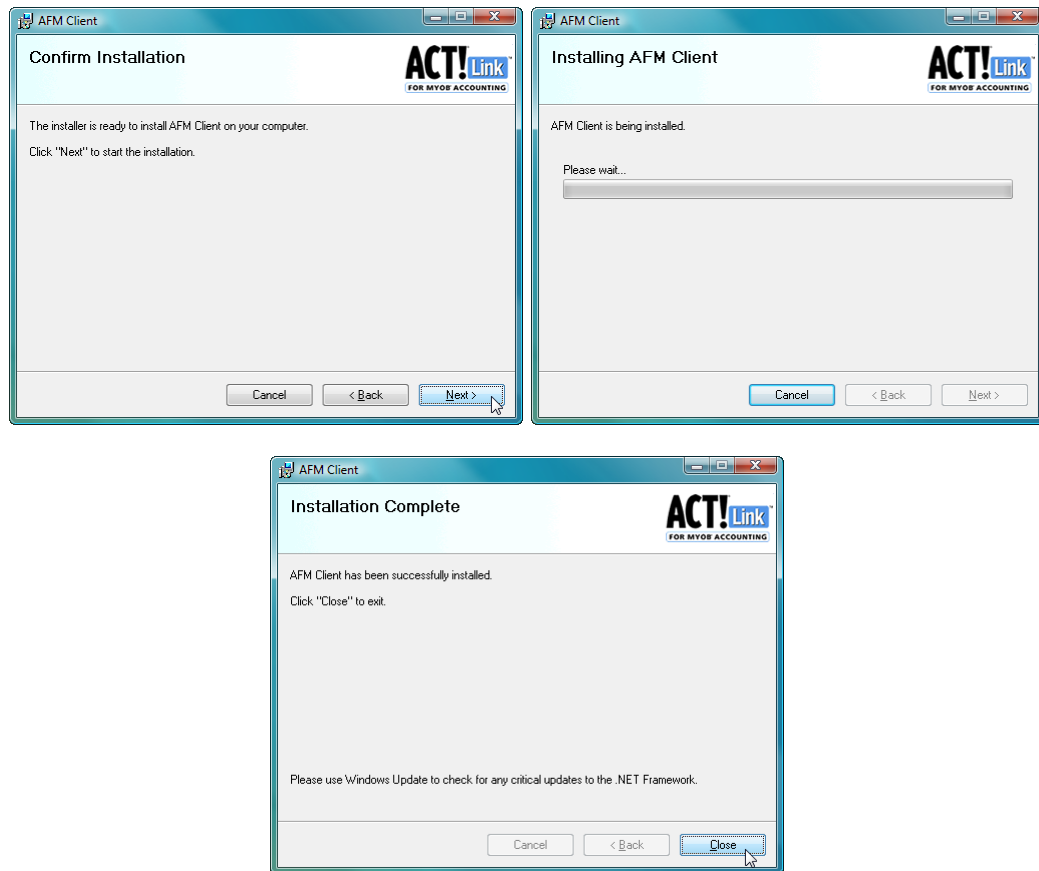
29. To allow other computers to use the link, you must configure the Windows Firewall and/or your Internet security (anti-virus, etc) software to allow TCP port 65200 through it. You may need your system administrator or IT consultant to assist.



Installing AFM Client

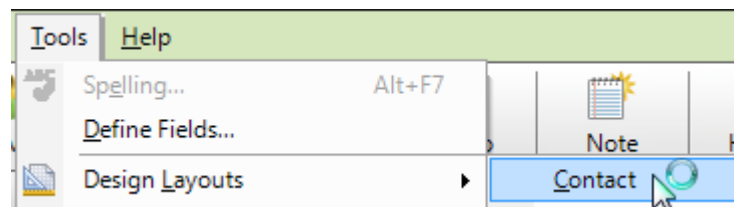
1. **Logon to Windows** as an administrator, and close any unnecessary applications.
2. **Run AFM.Client.Setup.exe** and complete the wizard as shown below:



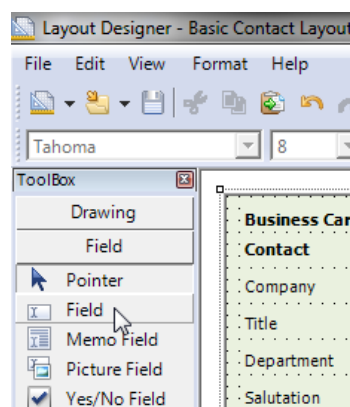


Summary Info Fields: Adding fields to the Layout

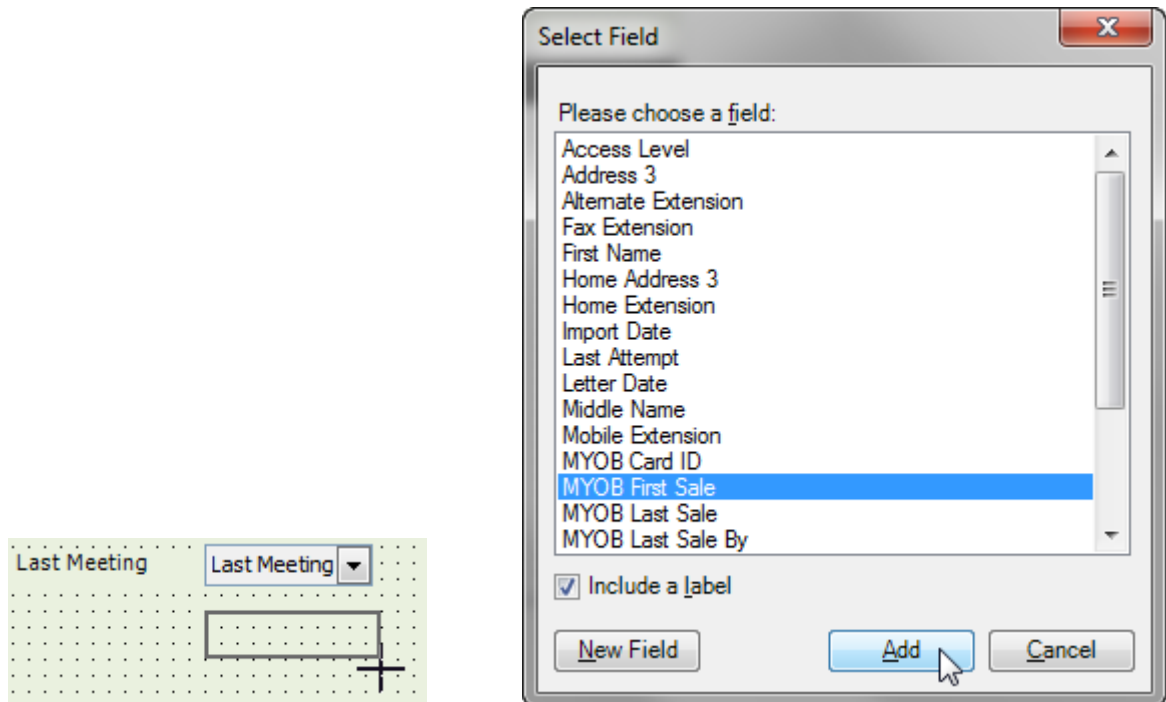
1. Login to Act! as an administrator or manager.
2. Click the Tools menu, then Design Layouts, then Contact.



3. Select the Field tool.



- Click on the layout where you would like the field to appear, hold the left mouse button down, and drag the mouse a small distance until the field appears in the appropriate size & shape, then release the mouse button to see a list of available fields.



- Select the field you wish to add to the layout and click Add. You can hold the Ctrl key to select multiple fields. Here is a suggested layout:

Last Activities		MYOB Data	
Last E-mail	Last E-mail ▼	First Sale	MYOB First Sale ▼
Last Call	Last Reach ▼	Last Sale	MYOB Last Sale ▼
Last Meeting	Last Meeting ▼	Last Sale By	MYOB Last Sale By ▼
Last Letter	Letter Date ▼	Total Sales	MYOB Total Sales ▼

- Click File menu, then exit to close the Layout Designer and agree to save changes when prompted.

Business Card		Address		Status	
Contact	James Cameron	Address 1	123 Hamilton Street	ID/Status	Customer
Company		Address 2		Referred By	
Title		City	Camdenwell		
Department		State/Postcode	Victoria 3154		
Salutation	James	Country	Australia		
Phone	03 9546 2465	Fax	03 9534 2453		
Mobile	03 9523 2563	Personal E-mail			
E-mail	Cameron@optus.com.au	Web Site	www.myob.com.au		
Last Results	Imported from MYOB				

Last Activities		MYOB Data	
Last E-mail	1/07/2011	First Sale	14/08/2010
Last Call	18/11/2010	First Sale By	Parker, Peter
Last Meeting	12/08/2010	Last Sale	17/11/2010
Last Letter	1/09/2011	Last Sale By	Parker, Peter
		Total Sales	\$3,277.00
		Outstanding	\$2,067.60

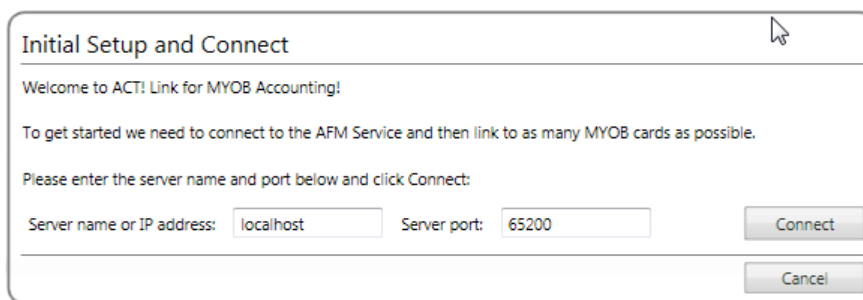
Starting Act! Link for MYOB AccountRight

The Trial Period

During the installation procedure above, you can activate a 30-day trial in the AFM Server. Each time you click Connect, the AFM Client will let you know how many days you have left of the trial. Once it expires, you must then add at least one user license to the AFM Server to continue using the link. There is a link to the Sage on-line store at www.redonionsoftware.com

Connecting to the Server

The first time you use the link, you must let AFM Client know where to connect to. You may see this:



Initial Setup and Connect

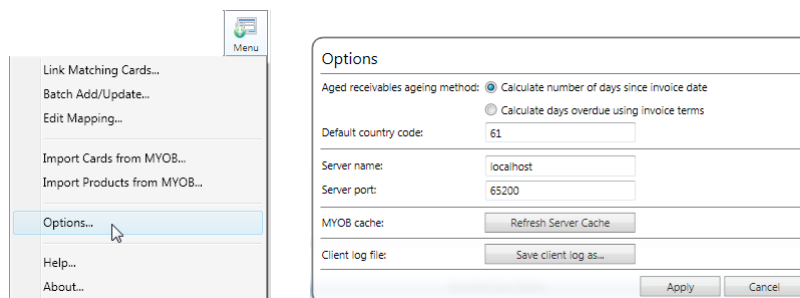
Welcome to ACT! Link for MYOB Accounting!

To get started we need to connect to the AFM Service and then link to as many MYOB cards as possible.

Please enter the server name and port below and click Connect:

Server name or IP address: Server port:

If you don't see the above prompt, Click the *Menu* button in the Act! Link for MYOB tab, and choose *Options*:



Menu

- Link Matching Cards...
- Batch Add/Update...
- Edit Mapping...
- Import Cards from MYOB...
- Import Products from MYOB...
- Options...**
- Help...
- About...

Options

Aged receivables ageing method: ☒ Calculate number of days since invoice date
☐ Calculate days overdue using invoice terms

Default country code:

Server name:

Server port:

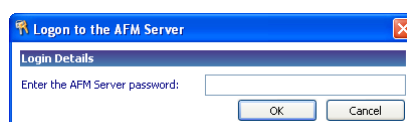
MYOB cache:

Client log file:

Next to "Server name", enter the name or IP address of the computer where AFM Server is installed. If you have installed the AFM Client & AFM Server on the same computer, you may enter "localhost" as the Server name. If you're in the Options window, click *Apply*.

Click *Connect* to start your session & access the MYOB data stored in the Server Cache. To reduce the load on your server & MYOB data file, and therefore increase the performance of your server & MYOB application, AFM Server retrieves data from MYOB periodically & stores the data in memory for the AFM Client to access (even while the MYOB administrator has the data file locked for certain tasks). You can also force the server to refresh at any time from here by clicking "Refresh Server Cache". You can also change the MYOB cache refresh interval in the AFM Server Administrator window to suit your hardware, data file size, and how up-to-date you want the AFM Client to be.

Each time you click connect, you may see a window like this. Use the password you entered in the Server Administrator window & press ENTER or click OK:



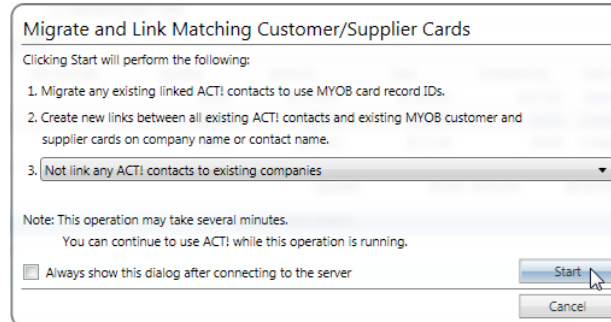
Logon to the AFM Server

Login Details

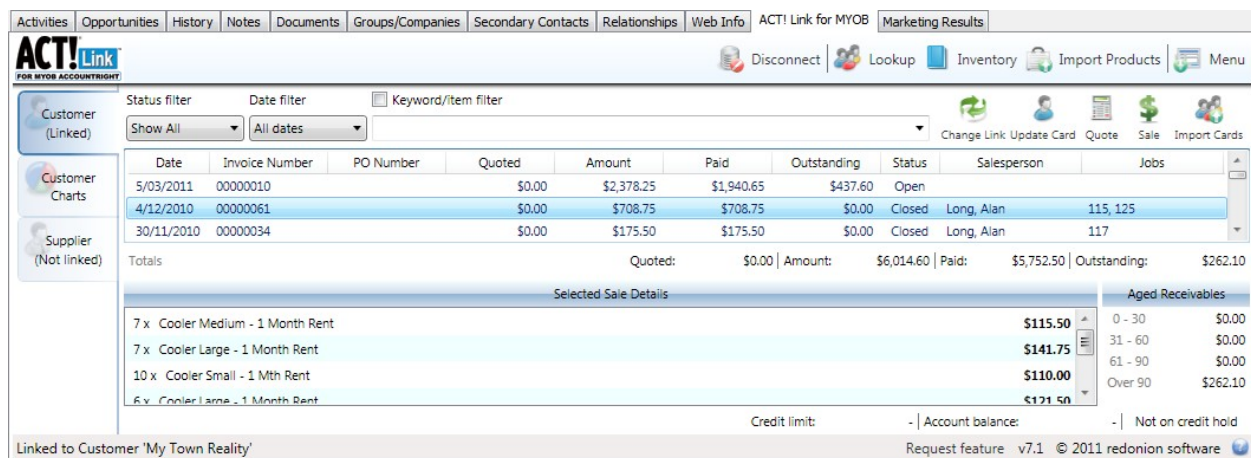
Enter the AFM Server password:

Link Matching Cards

You should use this feature to complete the setup. If you don't see it when you connect, click the *Menu* button on the Act! Link for MYOB tab, and choose *Migrate & Link Matching Cards*:



Click *Start* to firstly migrate any links created by a previous version of the software; and then link each Act! Contact to a MYOB customer* card with the same Company name or Contact name. This process may take several minutes. *...and Suppliers if you have permission in AFM Server Administrator. Now you are ready to use Act! Link for MYOB AccountRight. It should look like this:

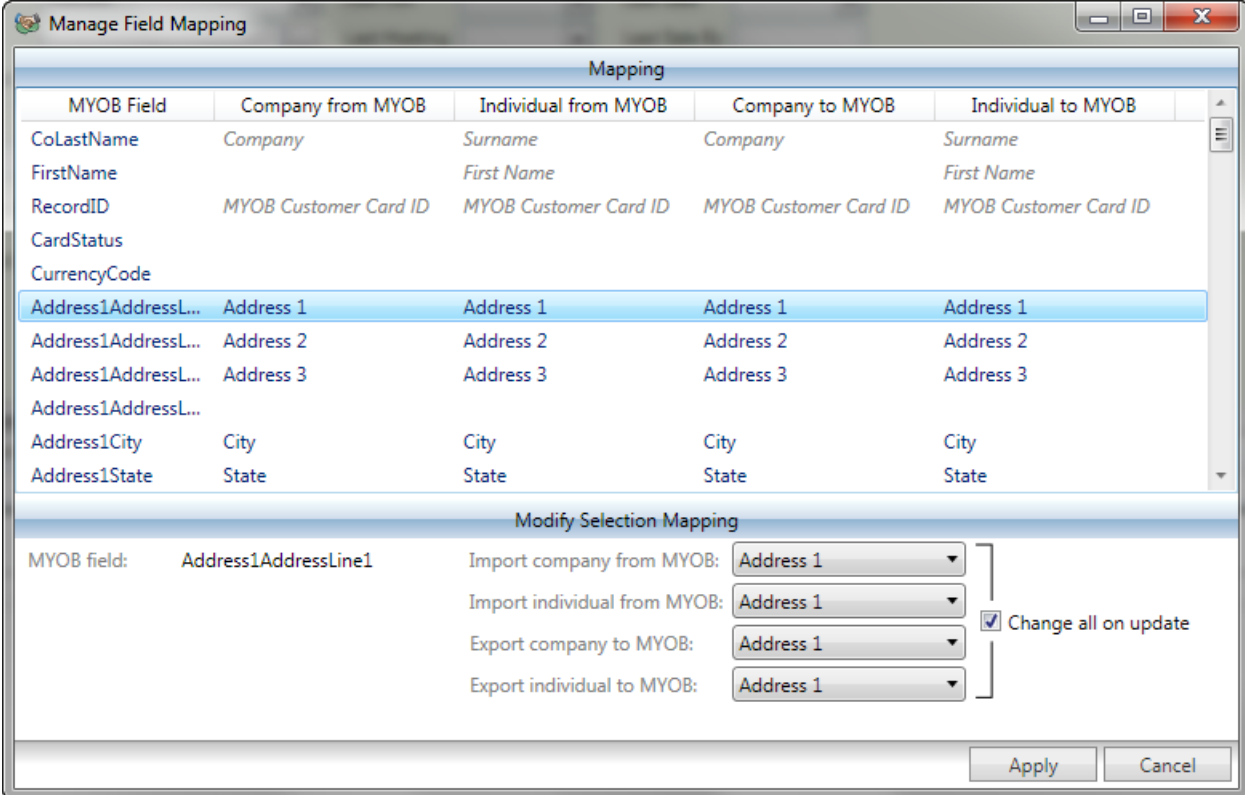


How does it know which MYOB card to show?

When you link a MYOB Card to an Act! Contact, the Record ID of the MYOB Card is stored on the Act! Contact record. It is stored in the MYOB Customer Card ID for Customers, and the MYOB Supplier Card ID for Suppliers. Therefore for any Act! Contact, the Link will display the information from the MYOB Customer identified by the MYOB Customer Card ID field on that Act! Contact record, and the information from the MYOB Supplier identified by the MYOB Supplier Card ID on that Act! Contact record.

Field Mapping

To change the field mapping, click the *Menu* button on the top right-hand corner of the Act! Link for MYOB tab to view the Link menu, and select *Edit mapping*...



The 'Manage Field Mapping' dialog box contains a table for mapping MYOB fields to ACT! fields. The table has five columns: MYOB Field, Company from MYOB, Individual from MYOB, Company to MYOB, and Individual to MYOB. The rows include CoLastName, FirstName, RecordID, CardStatus, CurrencyCode, Address1AddressL..., Address1AddressL..., Address1AddressL..., Address1City, and Address1State. Below the table is a 'Modify Selection Mapping' section with dropdown menus for 'Import company from MYOB', 'Import individual from MYOB', 'Export company to MYOB', and 'Export individual to MYOB'. A checkbox 'Change all on update' is also present. At the bottom are 'Apply' and 'Cancel' buttons.

MYOB Field	Company from MYOB	Individual from MYOB	Company to MYOB	Individual to MYOB
CoLastName	Company	Surname	Company	Surname
FirstName		First Name		First Name
RecordID	MYOB Customer Card ID	MYOB Customer Card ID	MYOB Customer Card ID	MYOB Customer Card ID
CardStatus				
CurrencyCode				
Address1AddressL...	Address 1	Address 1	Address 1	Address 1
Address1AddressL...	Address 2	Address 2	Address 2	Address 2
Address1AddressL...	Address 3	Address 3	Address 3	Address 3
Address1AddressL...				
Address1City	City	City	City	City
Address1State	State	State	State	State

Modify Selection Mapping

MYOB field: Address1AddressLine1

Import company from MYOB: Address 1

Import individual from MYOB: Address 1

Export company to MYOB: Address 1

Export individual to MYOB: Address 1

☒ Change all on update

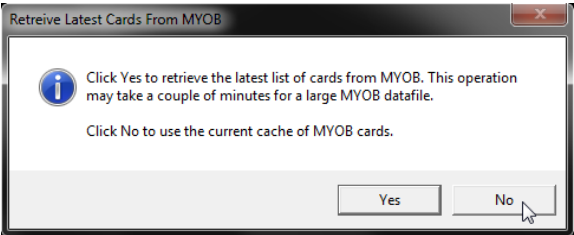
Apply Cancel

Caution: The Link has NOT been tested with all possible field mapping configurations. If you change the field mapping, please backup MYOB first, and then test the Add, Update and Import features to ensure the desired result is achieved.

Click on the MYOB field you wish to send information to, then in the dropdown box, choose the Act! field that you want the data to come from. When you are finished, click Save changes.

Importing MYOB Customers or MYOB Suppliers into Act!

Always run "Migrate & Link Matching Cards" from the Menu button before using this function. Click the Import Cards button on the Customer or Supplier tabs:

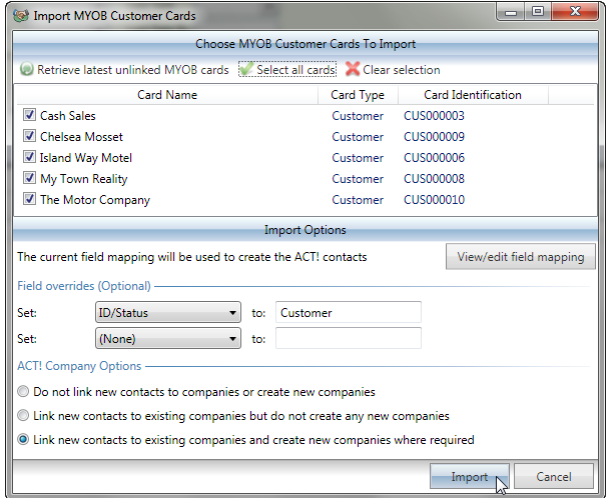



The 'Retrieve Latest Cards From MYOB' dialog box contains a message: 'Click Yes to retrieve the latest list of cards from MYOB. This operation may take a couple of minutes for a large MYOB datafile. Click No to use the current cache of MYOB cards.' At the bottom are 'Yes' and 'No' buttons.

Click Yes to retrieve the latest list of cards from MYOB. This operation may take a couple of minutes for a large MYOB datafile.

Click No to use the current cache of MYOB cards.

Yes No



The 'Import MYOB Customer Cards' dialog box contains a table for selecting cards to import. The table has three columns: Card Name, Card Type, and Card Identification. The rows include Cash Sales, Chelsea Mosset, Island Way Motel, My Town Reality, and The Motor Company. Below the table is an 'Import Options' section with dropdown menus for 'Set: ID/Status' and 'Set: (None)'. A checkbox 'Change all on update' is also present. At the bottom are 'Import' and 'Cancel' buttons.

Choose MYOB Customer Cards To Import

☒ Retrieve latest unlinked MYOB cards ☒ Select all cards ☐ Clear selection

Card Name	Card Type	Card Identification
<input checked="" type="checkbox"/> Cash Sales	Customer	CUS000003
<input checked="" type="checkbox"/> Chelsea Mosset	Customer	CUS000009
<input checked="" type="checkbox"/> Island Way Motel	Customer	CUS000006
<input checked="" type="checkbox"/> My Town Reality	Customer	CUS000008
<input checked="" type="checkbox"/> The Motor Company	Customer	CUS000010

Import Options

The current field mapping will be used to create the ACT! contacts [View/edit field mapping](#)

Field overrides (Optional)

Set: ID/Status to: Customer

Set: (None) to:

ACT! Company Options

☐ Do not link new contacts to companies or create new companies

☐ Link new contacts to existing companies but do not create any new companies

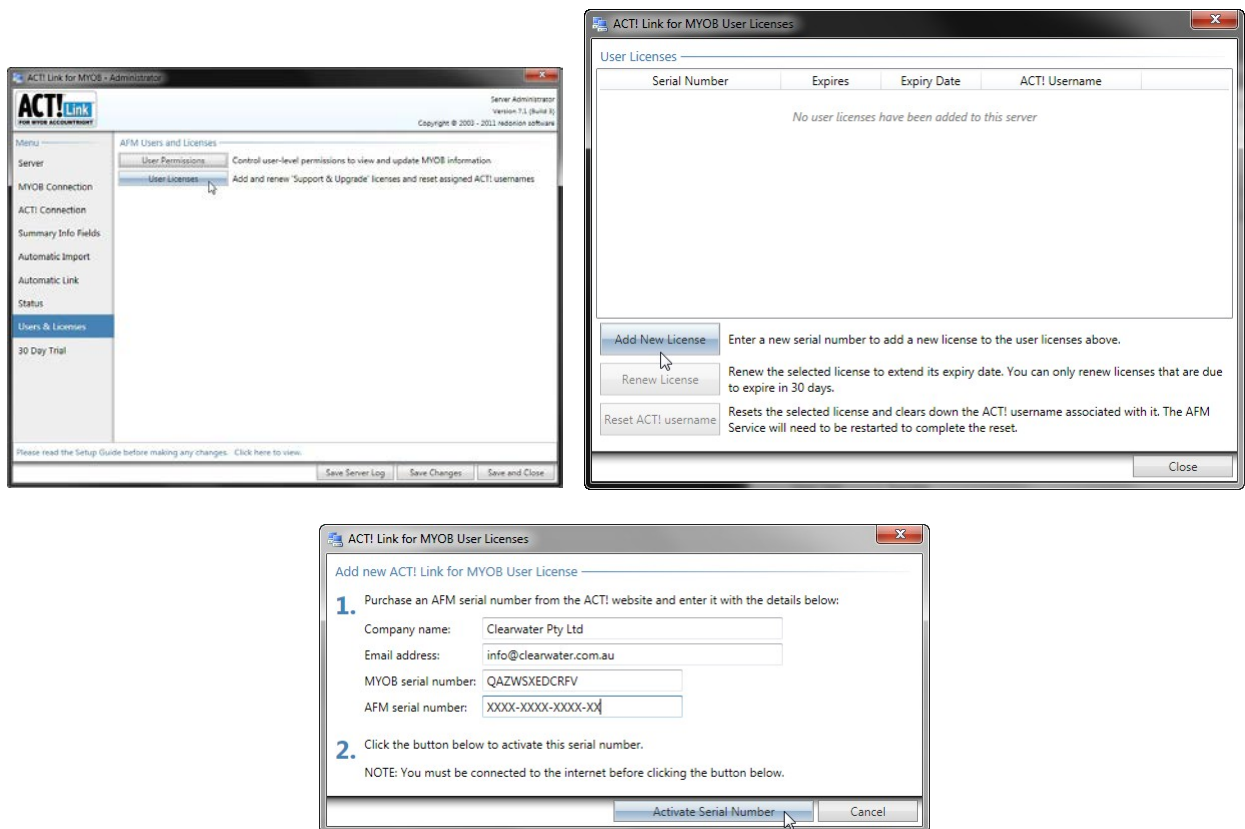
☒ Link new contacts to existing companies and create new companies where required

Import Cancel

Click "No" to use the current cache. Select the MYOB cards that you wish to import. You can choose to set two Act! fields to a specific value (eg. ID/Status = Customer). All other fields are determined by the field mapping (above). Under Act! Company Options, you can choose to link imported contacts to matching Company records and/or create Company records that do not exist. Click Import to complete the process. Please note that some MYOB customer cards will not be shown if they are already linked to Act! contacts. Imported contacts will NOT overwrite existing contacts.

Registering AFM Server

Open AFM Server Administrator using the desktop icon, or the Start Menu, then select the "Users & Licenses" page, then click "User Licenses", and click "Add New License". You must be logged on to Windows as an Administrator in order to register. You may also need to disable User Account Control, or use "Run as Administrator" when opening AFM Server Administrator.



Enter your company & email address so that we can notify you of any important issues or any updates that we might release in response to those issues. Your contact details will not be released to any other organisation. MYOB Australia requires that we collect your MYOB serial number as well. You can find this in your MYOB AccountRight application, under the *Setup* menu, then *Company Information*.

Enter the **AFM** (User/Client) serial number you have purchased from an Act! Certified Consultant or from <http://acc.swiftpage.com>. Click *Activate Serial Number* to send this information to our activation server (on HTTPS port 443, but if that fails, then HTTP port 80), along with your computer's unique ID, which will activate the license.

Note that the first Act! user to connect to the AFM Server after adding a license will be assigned to that license, and then only that Act! user can use that license, unless you select the appropriate license and click *Reset Act! username* to allow a different Act! user to be assigned to that license.

Understanding Act! Link for MYOB AccountRight (See separate User Guide)

Making the most of Act! Link for MYOB AccountRight

If you are not already working with an Act! Certified Consultant, we recommend that you contact one today to find out how they can make both Act! Link for MYOB AccountRight and the rest of your Act! Solution far more effective. Find a local consultant here:

<http://acc.swiftpage.com>

Troubleshooting

If you have difficulty installing or using the Link, you may wish to try the following:

1. Close & Re-open Act!.
2. Restart AFM Server service (for Enterprise Server, click the Restart Service button in AFM Server Administrator; for Desktop Server, restart the computer).
3. Temporarily disable firewall software, test, and then reconfigure if required (allow port 65200).
4. Open **MYOB** on the computer with AFM Server installed, and test that you can log in as "AFM".
5. Test while everyone has MYOB closed.
6. Try a UNC path to the data file in AFM Server Administrator (eg. \\SERVER\Share\Datafile.myo).
7. Ensure that you have met the system requirements & followed the install instructions.
8. For Windows Vista, Windows 7, and Server 2008 you may need to disable User Account Control (UAC) for the AFM Server and/or AFM Client to function correctly. Go to "Control Panel" > "User Accounts" > "User Accounts" again if required > "Turn User Account Control on or off" or "Change User Account Control Settings" > Untick the box or move the slider to the lowest setting ("never notify") & click OK > then restart the computer.
9. Download & install/re-install the latest version from www.redonionsoftware.com.
10. Remove & re-install **MYOB** to the default location.
11. Contact red onion software or your local Act! Certified Consultant.
12. Note that you can save the Server log file from the AFM Server Administrator window, and the client log file from the Options window (under Menu in the Act! Link for MYOB tab) and email these to us.

Support

Free Support is provided by our own Helpdesk for 12 months from your date of purchase, and then for each year that you renew your licenses. We can even arrange to log into your computer remotely & complete the installation for you. We only support the current version, but we can upgrade your installation if required.

Before you call the Helpdesk, please check our web site for any recent updates; read the setup guide; and have your Act! Link for MYOB serial number(s) ready.

For the fastest response, e-mail us at actlink@redonionsoftware.com. Alternatively, call the Helpdesk on **08 9389 4460** during 8:30am-5:30pm weekdays, Perth time (WST: GMT+8); leave your name, company & phone number. Either way, we will usually respond within one business day.

You will need to have the Administrator passwords for your MYOB data file, your Act! database, and your server (if you have a server). Please also ensure that you have already installed your MYOB AccountRight application on your server (if you have a server).