



Version 9

Link the following Act![®] software:

- **Act! Pro & Premium v15-v19**
(referred to as "Act!" in this guide)

to the following MYOB[®] software:

- **MYOB AccountRight 2014-2016**
- **MYOB AccountRight Live 2014-2016**
(referred to as "MYOB" in this guide)

USER GUIDE

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Getting Started

Terminology

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

AFM	ACT! Link for MYOB Accounting v9.0
ACT!	ACT! contact management software (versions listed on the front page of this guide)
MYOB	MYOB accounting software (versions listed on the front page of this guide)

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 MYOB Inventory, stock on hand or committed, and sell price.
- 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.

What's New in Version 9.0?

This version adds integration for the new MYOB AccountRight & AccountRight Live product lines

Where can I find more information?

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

How many licences do I need, and why renew them every year?

You will need a licence for each Act! username that needs to use the link. You can reassign a licence from one user to another at any time. You do NOT need to purchase a licence for the server component. A licence 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;
- 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 (see separate Setup Guide)

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** company file.

* This can be **EITHER** the Desktop Server **OR** the Enterprise Server. Do NOT install both. If the computer holding the MYOB company file is an unattended server, then you should use the *AFM Enterprise Server*. Otherwise it is a computer used by someone as their workstation, in which case, you should use the *AFM Desktop Server*.

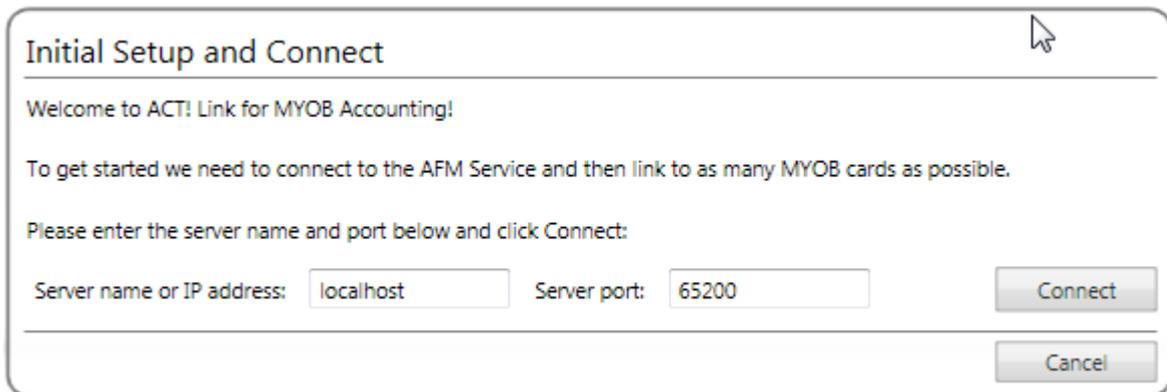
Starting ACT! Link for MYOB Accounting

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

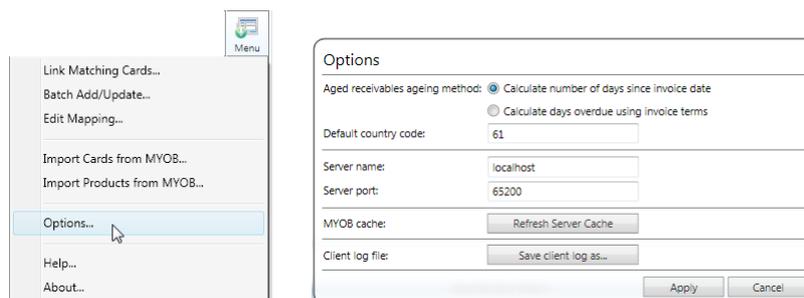
Connecting to the Server

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



The dialog box titled "Initial Setup and Connect" contains the following text: "Welcome to ACT! Link for MYOB Accounting!" and "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:". Below this text are two input fields: "Server name or IP address:" with the value "localhost" and "Server port:" with the value "65200". To the right of these fields are two buttons: "Connect" and "Cancel".

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



The image shows two overlapping windows. On the left is a "Menu" window with a list of options: "Link Matching Cards...", "Batch Add/Update...", "Edit Mapping...", "Import Cards from MYOB...", "Import Products from MYOB...", "Options..." (highlighted with a mouse cursor), "Help...", and "About...". On the right is the "Options" dialog box. It has the following fields and controls: "Aged receivables ageing method:" with two radio buttons, the first of which is selected; "Default country code:" with a text box containing "61"; "Server name:" with a text box containing "localhost"; "Server port:" with a text box containing "65200"; "MYOB cache:" with a "Refresh Server Cache" button; and "Client log file:" with a "Save client log as..." button. At the bottom right are "Apply" and "Cancel" buttons.

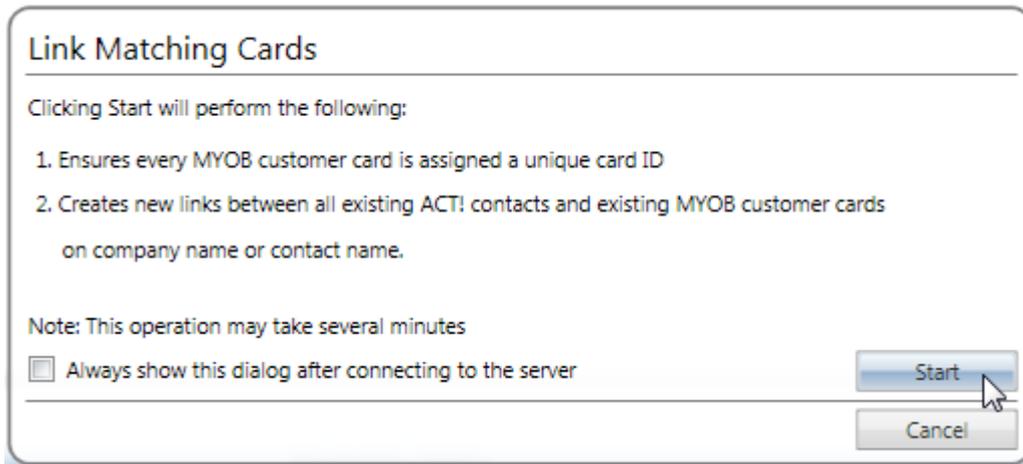
Next to "Server name", enter the name or IP address of the computer where AFM Server is installed. If you have installed the AFM Client & AFM Server on the same computer, you may enter "localhost" as the Server name. If you're in the Options window, click *Apply*.

Click *Connect* to start your session & access the MYOB data stored in the Server Cache. AFM Server retrieves data from MYOB periodically & stores the data in memory for the AFM Client to access. You can change how often AFM Server refreshes the cache in the Server Administrator window. You can also force the server to refresh at any time in the Options window, accessed via the menu button in the ACT! Link for MYOB tab. 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:



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 *Link Matching Cards*:



Click *Start* to firstly ensure that every MYOB customer card is assigned a unique Card ID; 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 enabled in AFM Server Administrator.* Now you are ready to use ACT! Link for MYOB Accounting. It should look like this:

Date	Invoice Number	PO Number	Quoted	Amount	Paid	Outstanding	Status	Salesperson		
17/05/2010	00000011		\$0.00	\$20.25	\$0.00	\$20.25	Open			
1/03/2010	00000001		\$0.00	\$1,835.63	\$1,835.63	\$0.00	Closed			
18/12/2009	00000012		\$0.00	\$250.00	\$0.00	\$250.00	Open			
Totals			Quoted:	\$0.00	Amount:	\$3,814.26	Paid:	\$2,078.03	Outstanding:	\$1,736.23

Selected Sale Details	Aged Receivables	
Cooler Large - 1 Month Rent	\$20.25	
	0 - 30	\$0.00
	31 - 60	\$0.00
	61 - 90	\$0.00
	Over 90	\$1,736.23

Linked to Customer 'A-Z Stationery Supplies' with card ID 'CUS000001'

How does it know which MYOB card to show?

When you link a MYOB Card to an ACT! Contact, the unique ID of the MYOB Card is stored on the ACT! Contact record. It is stored in the MYOB 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 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.

For this to work, every MYOB Card must be given a unique ID. This is achieved with the "Link Matching Cards" feature.

Add an ACT! Contact to MYOB (as a Customer)

If the current ACT! Contact is not linked to an MYOB customer card, then the *Modify link* and *Add* buttons are displayed in the ACT! Link for MYOB tab. If you do not wish to link the ACT! Contact to an existing MYOB customer card, click the *Add* button to use the current ACT! Contact's details to create a new MYOB customer card, and link them. You will be prompted to continue. This is ideal when a prospect becomes a customer, as you avoid retyping the details into MYOB.

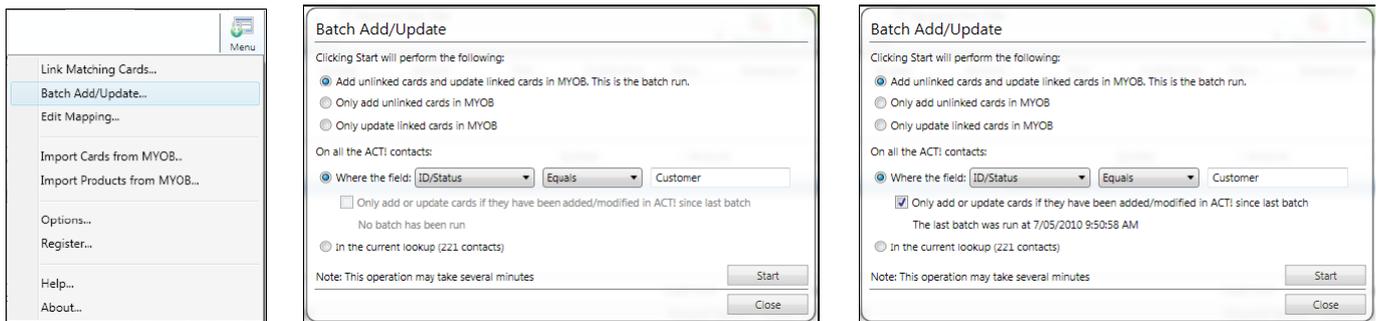
Update the linked MYOB Customer card

If the current ACT! Contact is linked to an MYOB customer card, then the *Modify link* and *Update* buttons are displayed in the ACT! Link for MYOB tab. If the ACT! Contact's details are more Complete & correct than the MYOB customer card, click the *Update* button to use the current ACT! Contact's details to update the linked MYOB customer card. You will be prompted to continue. If you receive an error message, refer to the Troubleshooting Guide at the end of this document. This is ideal when a contact changes address, as you avoid retyping the details into MYOB. Note that if an ACT! phone number is blank, the corresponding field in MYOB will NOT be changed. However if an ACT! Address field is blank the corresponding field in MYOB will be deleted. This is a limitation of MYOB.

Batch Add/Update of Customer Cards

IMPORTANT: PLEASE BACKUP YOUR MYOB DATAFILE BEFORE YOU USE THIS FEATURE.

Click the *Menu* button on the top right-hand corner of the ACT! Link for MYOB tab to view the Link menu, select *Batch Add/Update...*

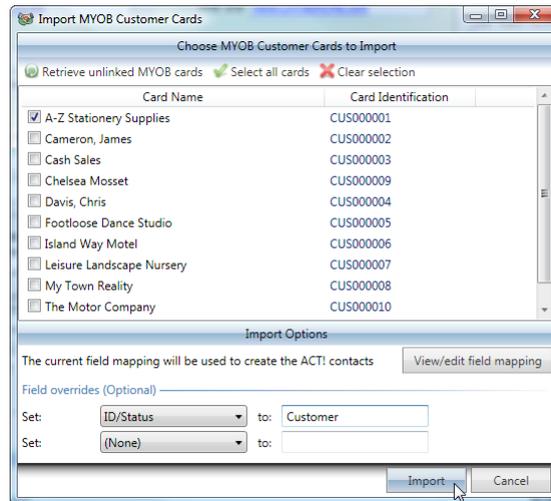


This function allows you to perform the Add and/or Update process described above on multiple contacts. You can select which contacts to Add/Update by a field value (eg. ID/Status = Customer) just use the current lookup. If you have already run the first option, then you may re-run it as you like (eg. Daily) on ONLY the contacts that have been added or updated since the last ran it. This would effectively create an almost automatic one-way sync from ACT! to MYOB.

Importing MYOB Customer cards into ACT!

IMPORTANT: PLEASE BACKUP YOUR ACT! DATABASE BEFORE YOU USE THIS FEATURE.

Click the *Menu* button on the top right-hand corner of the ACT! Link for MYOB tab to view the Link menu, and select *Import Cards from MYOB...*



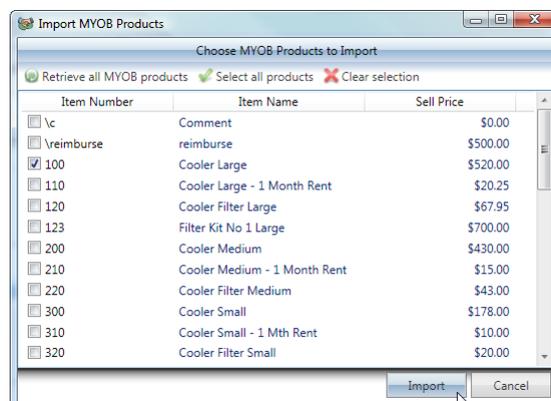
Select the MYOB cards that you wish to import. You can choose to set two ACT! fields to a specific value (eg. ID/Status = Customer). All other fields are determined by the field mapping (above). Click Import to complete the process. Please note that some MYOB customer cards will not be shown if they are already linked to ACT! contacts. Imported contacts will NOT overwrite existing contacts.

PERFORMANCE: This process can take a few seconds per MYOB card, so a hundred MYOB cards may take several minutes to import. Similarly, a thousand MYOB cards may take over an hour. If you are paying a consultant to help with this, they could instead export the data from your MYOB application manually, modify in Microsoft Excel, save as a text file, and use ACT!'s own import function. These manual steps could also be used to import Supplier cards.

Importing MYOB Items into the ACT! Product List

IMPORTANT: PLEASE BACKUP YOUR ACT! DATABASE BEFORE YOU USE THIS FEATURE.

If you plan to create MYOB Quotes, Orders or Invoices from ACT! Opportunities, then you may wish to import your MYOB Item list into the ACT! Product List, so that the items match. Click the *Menu* button on the top right-hand corner of the ACT! Link for MYOB tab to view the Link menu, and select *Import Items from MYOB...*



Understanding ACT! Link for MYOB Accounting

List window

This is a list of all quotes/orders/invoices (unless filtered or searched) for the selected contact, ordered by date, starting with the latest quote/order/invoice at the top of the window.

The screenshot shows the ACT! Link for MYOB Accounting interface. The main window displays a list of transactions for the customer 'A-Z Stationery Supplies'. The list includes columns for Date, Invoice Number, PO Number, Quoted, Amount, Paid, Outstanding, Status, and Salesperson. Below the list is a Totals Bar and an Aged Receivables Summary.

Date	Invoice Number	PO Number	Quoted	Amount	Paid	Outstanding	Status	Salesperson
17/05/2010	00000011		\$0.00	\$20.25	\$0.00	\$20.25	Open	
1/03/2010	00000001		\$0.00	\$1,835.63	\$1,835.63	\$0.00	Closed	
18/12/2009	00000012		\$0.00	\$250.00	\$0.00	\$250.00	Open	
Totals			Quoted: \$0.00	Amount: \$3,814.26	Paid: \$2,078.03	Outstanding: \$1,736.23		

Selected Sale Details	Aged Receivables
Cooler Large - 1 Month Rent	0 - 30 \$0.00
	31 - 60 \$0.00
	61 - 90 \$0.00
	Over 90 \$1,736.23

At the bottom of the window, it shows: Credit limit: - | Account balance: - | Not on credit hold. Request feature v6.2 © 2011 redonion software

Totals Bar

This bar calculates (for the quotes/orders/invoices shown) the total amount quoted, ordered and/or invoiced, as well as the total amount paid, and the total amount outstanding for the selected contact. To see only the total amount in quotes for that contact, change the Filter to Only Quotes. Or to see the total amount on order, change the Filter to Only Orders.

Aged Receivables

This area displays the Aged Receivables Summary for the current contact as per the Aged Receivables Report in MYOB. Since the MYOB report allows you to choose between two methods of ageing, you have the same choice in the Options Window.

Status Filter

This allows you to change the list window to show only quotes, orders, credits, open sales or closed sales. Or it can show all, or only those that are not closed. To apply one of these filters, simply choose the desired filter from the menu, and it will be applied.

ACT!Link FOR MYOB ACCOUNTING

Status filter: Hide Closed (selected)
Date filter: All dates

Customer (Linked)
Supplier (Not linked)

Supplies

Date	Invoice Number	PO Number	Quoted	Amount	Paid	Outstanding	Status	Salesperson
	00011		\$0.00	\$20.25	\$0.00	\$20.25	Open	
	00012		\$0.00	\$250.00	\$0.00	\$250.00	Open	
27/11/2009	00000038		\$0.00	\$224.38	\$0.00	\$224.38	Open	Jones, Mary
Totals			Quoted: \$0.00	Amount: \$1,978.63	Paid: \$242.40	Outstanding: \$1,736.23		

Selected Sale Details: Cooler Large - 1 Month Rent \$20.25

Aged Receivables:

0 - 30	\$0.00
31 - 60	\$0.00
61 - 90	\$0.00
Over 90	\$1,736.23

Credit limit: - | Account balance: - | Not on credit hold

Linked to Customer 'A-Z Stationery Supplies' with card ID 'CUS000001'

Date Filter

This allows you to limit the list of sales displayed to only those occurring within the selected date range. Select from a list of useful date ranges.

ACT!Link FOR MYOB ACCOUNTING

Status filter: Show All
Date filter: Over 90 days (selected)

Customer (Linked)
Supplier (Not linked)

A-Z Stationery S

Date	Inv	PO Number	Quoted	Amount	Paid	Outstanding	Status	Salesperson
17/05/2010	0000		\$0.00	\$20.25	\$0.00	\$20.25	Open	
1/03/2010	0000		\$0.00	\$1,835.63	\$1,835.63	\$0.00	Closed	
18/12/2009	0000		\$0.00	\$250.00	\$0.00	\$250.00	Open	
Totals			Quoted: \$0.00	Amount: \$3,814.26	Paid: \$2,078.03	Outstanding: \$1,736.23		

Selected Sale Details: Cooler Large - 1 Month Rent \$20.25

Aged Receivables:

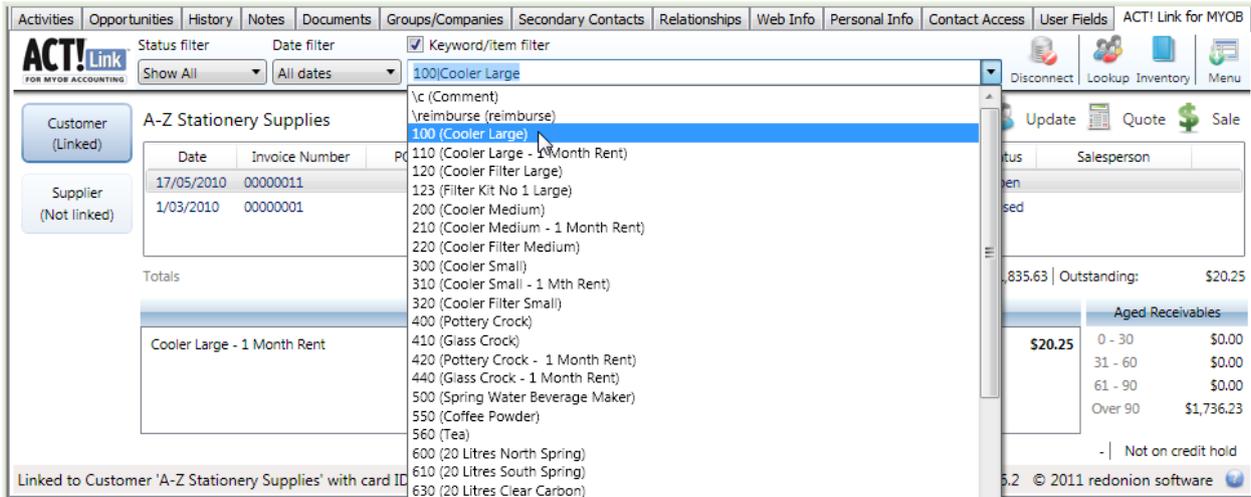
0 - 30	\$0.00
31 - 60	\$0.00
61 - 90	\$0.00
Over 90	\$1,736.23

Credit limit: - | Account balance: - | Not on credit hold

Linked to Customer 'A-Z Stationery Supplies' with card ID 'CUS000001'

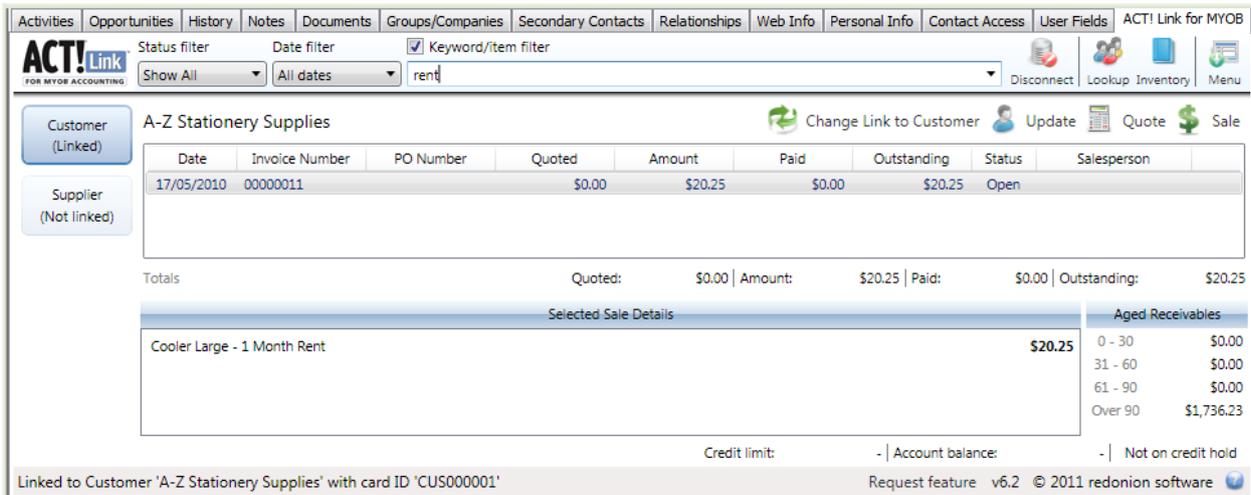
Filter by Item

Select an inventory item, and click Search (or press ENTER). The list window will change to show only the quotes/orders/invoices with detail containing that item (for the selected contact). Click the check box again to remove the tick & cancel the search.



Filter by Keyword

Type a keyword or phrase into the Search box and click Search (or press ENTER). The list window will change to show only the quotes/orders/invoices with detail containing that keyword or phrase (for the selected contact). Click the check box again to remove the tick & cancel the search.

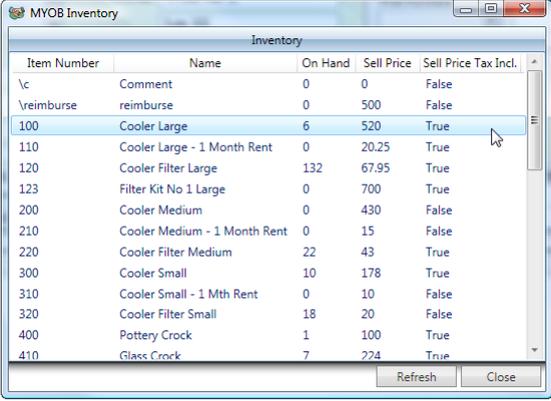


Detail window

This shows you the detail & price for each line of the quote/order/invoice selected in the List window. As you select different quotes/orders/invoices in the List window, the detail window changes to show the detail of the newly selected sale. You can copy and paste this detail into another area of ACT! or another application if you wish.

Inventory

Click the Inventory button to see a list of MYOB Items, stock level & Sell Price:



Item Number	Name	On Hand	Sell Price	Sell Price Tax Incl.
\c	Comment	0	0	False
Veimburse	reimburse	0	500	False
100	Cooler Large	6	520	True
110	Cooler Large - 1 Month Rent	0	20.25	True
120	Cooler Filter Large	132	67.95	True
123	Filter Kit No 1 Large	0	700	True
200	Cooler Medium	0	430	False
210	Cooler Medium - 1 Month Rent	0	15	False
220	Cooler Filter Medium	22	43	True
300	Cooler Small	10	178	True
310	Cooler Small - 1 Mth Rent	0	10	False
320	Cooler Filter Small	18	20	False
400	Pottery Crock	1	100	True
410	Glass Crock	7	224	True

Making the most of ACT! Link for MYOB Accounting

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 Accounting and the rest of your ACT! Solution far more effective. Find a local consultant here:

acc.swiftpage.com

Troubleshooting (see separate Setup Guide)