



ACT! Link for MAS

Closing the Gap between Operations, Sales and Marketing

Step by step instructions of bi-directional link installation between Sage MAS 90 and ACT! by Sage

Installation Summary

- 17. Install & Configure Sage MAS 90*
- 18. Install & Configure ACT!*
- 19. Install & Configure ACT! link to MAS*
- 20. Synchronize data from MAS to ACT!*

Step 1 – Install Sage MAS 90

Install MAS software

- Make sure to include at least AR, SO and IM modules
- Use the Product key provided on your packing slip

Apply all MAS service updates

Important – Security must be enabled in MAS. Setup a MAS logon with sufficient privileges to create customers, orders and quotes in MAS

Step 2 – Enter the Object Interface Key

- Register the object interface key located under Library Master → System Configuration → Registration Tab

Step 3 – Configure MAS

Enable external access for all companies that will be used to link to ACT!

- In MAS, select Library Master → Main Menu → Company Maintenance
- At the company code field, select the company that you are enabling external access for, and then click the Preference tab.
- Select the “Allow External Access” check box, and then click Accept button.
- Close the Company Maintenance window.

Step 4 – Enable Customer Tracking

Enable customer tracking changes in the Accounts Receivable module to view customer changes made in ACT! link to MAS

- In MAS, select Accounts Receivable Setup → Accounts Receivable options
- Click on the History tab
- At the Customer Changes to Track field, select “All”, and then click “Accept” button.
- Close the Accounts Receivable Options window.

Step 5 – Install ACT! and ACT! link to MAS

- Install ACT!
- Upgrade ACT! to the latest version and point release



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- Install ACT! Link to MAS in the \Plugins folder where you installed ACT!
- Install both ACT! and ACT! Link to MAS on every workstation that will use ACT! Link to MAS

Step 6 – Configure ACT! Link to MAS

- The MAS logon parameters window appears the first time you access ACT!. You can also access these parameters by selecting Tools → ACT! Link to MAS → MAS 90 logon parameters. Log into MAS using the logon created earlier.
- In ACT! , select Tools → ACT! Link to MAS → ACT! Link to MAS setup. Set up the options you want. The defaults offered by Sage are excellent and can be used directly.

Step 7 – Synchronize your data from MAS

Performing this procedure creates the new company records and associates the existing contacts with the new companies.

- To synchronize the data, select Tools → ACT! Link to MAS → Update/Load Companies
- In the display that pops up, select the MAS companies you want to synchronize and click “Accept” button.

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