



# 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.

Division	Default	Terms Code	Open Item	Tax Schedule	Salesperson
01	<input checked="" type="checkbox"/>	00	<input checked="" type="checkbox"/>	NONTAX	
02	<input type="checkbox"/>	00	<input checked="" type="checkbox"/>	NONTAX	
99	<input type="checkbox"/>	00	<input checked="" type="checkbox"/>	NONTAX	

ACT! Field	MAS 90 / 200 Field
Company	CUSTOMERNAME\$
Address 1	ADDRESSLINE1\$
Address 2	ADDRESSLINE2\$
Address 3	ADDRESSLINE3\$
ZIP Code	ZIPCODE\$
City	CITY\$
State	STATE\$
Country	COUNTRYCODE\$

## 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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