

ACT! LINK FREQUENTLY ASKED QUESTIONS

1. What is Sage MAS 90 and 200 ACT! Link and why do I need it?

- Sage MAS 90 and 200 ACT! Link v1.5 creates a seamless integration between the ACT! by Sage contact management solution and your back-office Sage MAS 90 and 200 ERP system. ACT! Link puts critical information at your fingertips so you can provide your current customers with better service and convert your prospects to new customers.
- ACT! Link provides your front office and sales personnel with all the data they need within the familiar environment of ACT! — sales processes, operational efficiencies, and financial performance — within a single solution.

2. How many Sage MAS 90 and 200 ACT! Link licenses do I need?

- You will only need one ACT! Link 1.5 license regardless of how many ACT! by Sage and Sage MAS 90 or 200 users you have.

3. How much does a Sage MAS 90 and 200 ACT! Link license cost?

- ACT! Link v1.5 is provided at no cost to Sage MAS 90 and 200 customers on maintenance.
- The Business Object Interface is also provided by request at no cost.

4. Where do I get Sage MAS 90 and 200 ACT! Link?

- Your ACT! Link certified Business Partner will provide it to you when you purchase ACT! for Sage MAS 90 and 200 at time of installation.

5. What version of ACT! by Sage software does Sage MAS 90 and 200 ACT! Link support?

Sage MAS 90 and 200 ACT! Link Compatibility Matrix

Product	Version
ACT! Link	1.5
Sage MAS 90	4.1 or 4.2 or 4.3
Sage MAS 200	4.1 or 4.2 or 4.3
ACT! by Sage	2007 Standard or 2007 Premium, 2008 Standard or 2008 Premium, 2009 Standard or 2009 Premium

6. What are the recommended record sizes for an ACT! Link 1.5 site to have good system performance? If I exceed that amount, what do I do?

- We recommend that the following guidelines are followed using ACT Link 1.5:

VOLUME	FILE NAME	RECORDS
Approx 5 years of data at 4000 invoices per year	AR_InvoiceHistoryHeader.M4T	20,000
Approx 5 years of data with 5 lines per invoice	AR_InvoiceHistoryDetail.M4T	100,000
Approx 4000 invoices per year or 7 1/2 months in files at any one time	AR_OpenInvoice.M4T	650
Approx 5 lines per invoice	AR_TransactionPaymentHistory.M4T	3,250

- If you are approaching the volumes shown above, please consider SageCRM. SageCRM is an easy-to-use, feature-rich, Internet-based suite of applications that provides enterprise-wide access to customer, partner and prospect information.

7. How many additional Sage MAS 90 or 200 licenses do I need for my sales team to be able to use Sage MAS 90 and 200 ACT! Link?

- The main dynamic is how often each individual on your team will access the Sage MAS 90 or 200 system. For example, a high-use ratio will be if your users enable auto-refresh for most of their assigned accounts and your team is on the phone generating quotes and orders most of the day, updating accounts in Sage MAS 90 or 200. For this high-use scenario, we recommend an 80% proportion (i.e. 10 sales people, 8 Sage MAS 90 or 200 concurrent user licenses). Your Sage Software business partner will be able to accurately assess your situation and make a recommendation.

8. Which Sage MAS 90 and 200 ACT! Link functions require Sage MAS 90 or 200 licenses?

- In general, ACT! Link uses a license when the Sage MAS 90 or 200 system is accessed - when data is being refreshed or sent, as in the case of promoting opportunities to orders or generating quotes. Specifically, it is dependent on established settings. If you have the company that you are accessing set to auto-refresh, anytime you view new Sage MAS 90 or 200 data or perform a Sage MAS 90 or 200 task, the Sage MAS 90 or 200 system is accessed and a license is used. However, if you are inside a company record going from tab to tab viewing data that has already been synchronized to the ACT! by Sage system, you are not using one of your Sage MAS 90 or 200 licenses.

9. What are the system requirements for Sage MAS 90 and 200 ACT! Link?

- 512 ram
- 10 MB Hard Disk Space
- ACT! by Sage 2007 or higher
- Windows 2000 W/SP4 or higher
- Sage MAS 90 or 200 Version 4.10 or higher

10. I have multiple layers of security on my Sage MAS 90 or 200 system, can I control what data the Sage MAS 90 and 200 ACT! Link users can see and change?

- All Sage MAS 90 and 200 security settings are in full effect with ACT! Link. And, you can utilize Sage MAS 90 and 200 Business Rules to establish fields that are read-only or block access to fields of information.
- In the ACT! Link configuration process, a Sage MAS 90 or 200 user code and password is uniquely assigned to the ACT! by Sage user. When the user accesses Sage MAS 90 or 200 they are recognized by the system and are allowed access according to the established security settings.

11. I have enabled security on my ACT! by Sage, does Sage MAS 90 and 200 ACT! Link affect those settings?

- All ACT! by Sage security settings for limited access and editing to ACT! by Sage records are still in effect with ACT! Link.

12. What happens if one of my sales team is promoting an opportunity to an order using Sage MAS 90 and 200 ACT! Link and every available Sage MAS 90 or 200 license is being used?

- If every available license is already in use, any user attempting to access the system will receive a message that no Sage MAS 90 or 200 license is available and that they should try again. No data will be lost, and the function should be repeated until a successful access occurs. If your users are experiencing this frequently, you should consider increasing the number of Sage MAS 90 or 200 licenses you have allocated for your front-office team.

13. What data access is available to Sage MAS 90 and 200 ACT! Link users who are working remotely and are not connected to the Sage MAS 90 or 200 server?

- Remote users can see all the Sage MAS 90 or 200 data that was previously synchronized to their ACT! by Sage system when they were previously connected to the server. The data reflects the last time the company data was refreshed and the data displayed in the ACT! Link specific tabs is read-only.

14. When an offline Sage MAS 90 and 200 ACT! Link user returns to the office and connects to the Sage MAS 90 or 200 server, are updates synchronized? Is there any conflict resolution that would be run in the background?

- Remote users cannot synchronize.
- Upon reconnecting to the server, a remote user will update according to how ACT! Link has been configured to perform this operation.
- Updates for remote users can be set in three ways:
 1. Auto Refresh provides updated information when the company is accessed in ACT! by Sage
 2. Real Time allows the system to update all records automatically
 3. Manual Update is done on demand using the Tools link. An information "owner" (MAS or ACT!) is established during set up, either Sage MAS 90 (Sage MAS 200) or ACT! by Sage is the owner of specific fields of data.

15. I didn't get a prompt to logon to Sage MAS 90 or 200 - was that done once at startup of ACT! by Sage?

- Once you have configured the database for your ACT! by Sage user code, your Sage MAS 90 or 200 Logon is automatically logged in when you logon under your ACT! user code. Because the Sage MAS 90 or 200 ACT! Link Setup is configured for your ACT! by Sage user code, the setup configuration stores your Sage MAS 90 or 200 Logon.

16. Does an ACT! by Sage record (company, opportunity, etc.) have to be selected before a Sage MAS 90 or 200 menu choice is selected?

- Yes, because each customer is unique, ACT! Link allows for maximum flexibility by performing operations on a company level.

17. Does anything sync to the ACT! by Sage for Palm or for the Web product?

- Yes, all ACT! by Sage data syncs but you will NOT have access to the Sage MAS 90 or 200 data using the Palm or the Web product.

18. I have custom Crystal reports that provide excellent customer data. Is there anyway to get similar data using Sage MAS 90 and 200 ACT! Link?

- Powerful Custom Queries are available in ACT! Link. Because ACT! Link can understand SQL queries, you can view familiar customer information refreshed onscreen automatically in ACT! by Sage.

19. I can't see Sage MAS 90 data for one of my companies, what's wrong with my Sage MAS 90 and 200 ACT! Link?

- Ensure you have enabled "Allow Remote Access" in the Sage MAS 90 company maintenance screen. Once that has been selected, you should have access to that company in ACT! by Sage using ACT! Link, if you are still not seeing the Sage MAS 90 company information, please call your Sage Business Partner.

20. I have standard finance policies, can I establish those settings in Sage MAS 90 and 200 ACT! Link for new customers created by my sales team?

- ACT! Link allows you to establish a default company with custom settings that is used when a new customer is created in Sage MAS 90 or 200 from ACT! by Sage or your sales team promotes an opportunity to an order or quote, including terms, tax schedule, salesperson and division.

21. Why do I have an extra line item in a sales order that I created from promoting an opportunity in Sage MAS 90 and 200 ACT! Link?

- ACT! Link adds a comment line to your sales order to indicate that the order was created from ACT! by Sage.

22. If I don't upgrade to the new Sage MAS 90 and 200 ACT! Link will you still support me?

- Sage will continue supporting existing Sage MAS 90 and 200 3.71, 4.0 and 4.05 with the previous version of ACT! Link. The ACT! versions compatible with the older versions of Sage MAS 90 and 200 are no longer supported. Please see the Integrated Solutions Compatibility Matrix for compatible versions to Sage MAS 90 and 200 4.10 and higher. If you decide to upgrade your ACT! by Sage, ACT! Link and Sage MAS 90 or 200, your certified Sage Business Partner can provide a step by step upgrade.

23. I have the previous version of Sage ACT! Link. I'm not sure if I want to upgrade to the new Sage MAS 90 and 200 ACT! Link.

- The new ACT! Link (compatible with ACT! 2006 and higher) and the old ACT! Link (compatible with ACT! 2004 and lower) are not the same product. Both accomplish the relationship between ACT! and MAS 90 or 200 with slight variations in process. You should complete an evaluation of your business process in your current ACT! Link to ensure you understand the process changes that may need adjusted.

24. I'm an ACT! by Sage customer and I'm considering using Sage MAS 90 and 200 ACT! Link to synchronize with Sage MAS 90. If I do that, what Sage MAS 90 data syncs? What sync options do I have?

- The Sage MAS 90 and 200 fields that link to ACT! by Sage fields and the settings for data syncs are established at setup, as well as security for the data that you are allowed to view. For example, if auto-refresh is checked for the company you are accessing in ACT!, the refresh takes as little as a few seconds and you will get immediate access to critical up-to-date information.

24. Do all my data fields have to be linked in ACT! by Sage to Sage MAS 90 for queries to work?

- It is not necessary to link all fields. You can define the Primary Link between a Sage MAS 90 customer and the ACT! by Sage company record and all associated information can be queried. For example, using ACT! Link, a user will be able to view ACME's Item Purchase History using the primary link established in setup.

25. Are any reporting features included in Sage MAS 90 and 200 ACT! Link?

- You have access to reporting features in ACT! by Sage or Sage MAS 90 and 200 to monitor your key business indicators and get an overall view of your company, including sales processes, operational efficiencies, and financial performance.
- The additional accounting data that appears in ACT! on the accounting specific tabs are actually stored as an XML file. That means that it is non-attributable data and cannot be reported on from within ACT!.

26. I have several customers who are unlike others in my company. Can I modify the data I see for those unique and complex accounts?

- Yes, ACT! Link allows you to sort and personalize how the data grid appears to you, without affecting other team member's views. You have the ability to rearrange the standard column order, hide irrelevant columns, and use filters on the data within the column. These settings are saved automatically, so you only have to do the personalization once.

27. Why am I seeing the new ACT! Link data Grid behave differently from what I normally see in ACT!?

- The Grid provided by ACT! Link is not a standard ACT! by Sage component. The new ACT! Link Grid provides some advanced grid features that make it easy for the end user to sort, add columns, remove columns, reorder columns and more. For more detail on the ACT! Link Grid, go to the Online help for ACT! Link and search on "GRID".

28. Does ACT! Link generate the product lists that are used for Opportunities from Sage MAS 90 Inventory Items?

- Sage MAS 90 and 200 Inventory Item information is available to be used when creating opportunities within ACT! by Sage. Select Refresh Inventory Items to bring over the Sage MAS 90 and 200 data into the ACT! by Sage system.
- Any opportunities that contain items that are NOT in the Sage MAS 90 or 200 inventory item list will be converted to special items when the opportunity is promoted to a quote or order in the Sage MAS 90 or 200 system.

29. Is there any difference in ACT! Link functionality if I want to use ACT! by Sage Premium Edition for Workgroups?

- Sage MAS 90 and 200 ACT! Link provides the same functionality regardless of whether you are using the Standard or Premium edition.

30. Can I still customize ACT! by Sage if I am using ACT! Link?

- Yes. You can customize ACT! by Sage to meet your specific needs. You will need to close and then re-open ACT! by Sage to rebuild ACT! Link tabs on your customized ACT! by Sage desktop.

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