

Act! Link

GETTING STARTED GUIDE

2012



sage

Sage ACT! Link for Sage Simply Accounting Getting Started Guide

Once you install Sage ACT! Link for Sage Simply Accounting, you can import your Sage Simply Accounting customers and vendors into Sage ACT! to quickly create a database of contacts. You can track detailed information on multiple contacts at your clients' companies, link accounting data to contacts, and update or synchronize information between Sage Simply Accounting and Sage ACT!.

Installing Sage ACT! Link for Sage Simply Accounting 2012

Requirements

Sage ACT! Link for Sage Simply Accounting 2012 supports:

- Sage ACT! 2011
- Sage ACT! 2012
- All Sage Simply Accounting 2012 editions, except Sage Simply Accounting First Step 2012

Before installing the Sage ACT! Link for Sage Simply Accounting, install Sage ACT! and the latest version of Sage Simply Accounting.

To install Sage ACT! Link from the Sage Simply Accounting CD:

1. If you are running Sage ACT! or Sage Simply Accounting 2012, close both now.
2. Insert the Sage Simply Accounting installation CD into your computer. Select the Additional Products option, and then click Install Sage ACT! Link for Sage Simply Accounting.
3. Follow the on-screen instructions to complete the installation.

After the program is installed, set up your database and contacts in Sage ACT!.

Note: The Sage ACT Link! for Sage Simply Accounting 2012 is also available for download from the Sage Simply Accounting website at http://www.simplyaccounting.com/supportTraining/support_resources/actLink.

Setting Up the Link to Sage Simply Accounting

In Sage ACT!, you must first specify the Sage Simply Accounting driver and the company you want to link to.

Note: You can only link to one Sage Simply Accounting company per contact database.

To set up the link to Sage Simply Accounting:

1. Open a contact database in Sage ACT!.

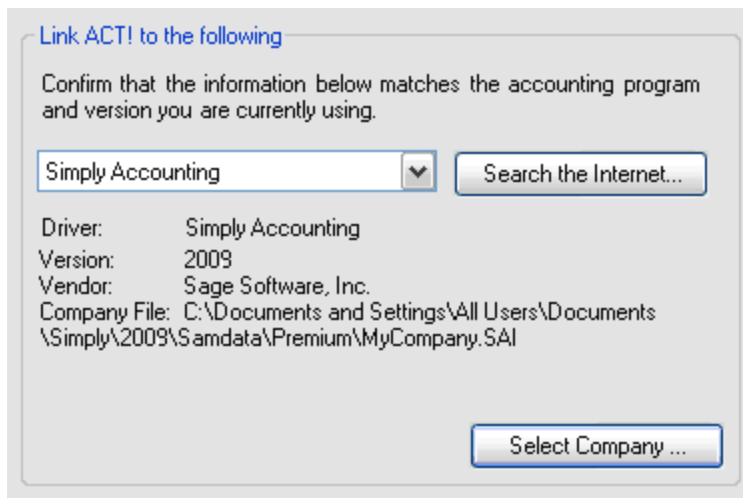
To create a new contact database, click the New Database button from the main toolbar.

1. Enter a Name for your contact database.
2. Enter or browse to select a Location in which to save the file.
3. Enter a User name.
4. From the Accounting Link menu, select Setup. The Accounting Link Setup Wizard is displayed.
5. Read the introduction and then click Next.
6. If Sage Simply Accounting does not appear in the Driver list, click Cancel to close the Wizard and then exit Sage ACT!. Repeat steps 1 through 3. If the Sage Simply Accounting driver is still not listed, close Sage ACT! and then reinstall the Sage ACT! Link.

To learn more about Sage ACT! accounting integration options, click the Search the Internet button.

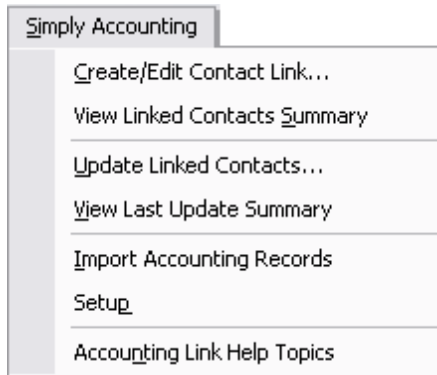
7. If your Sage Simply Accounting company is not listed, click Select Company and browse to select your company file.

After a company is selected, the window should look similar to the following:



8. Click Next to view or modify the default mapping of Sage Simply Accounting customer and vendor fields to Sage ACT! contact fields. To modify the default data mapping, follow the on-screen directions.
9. Click Finish to create the link between the Sage ACT! contact database and your Sage Simply Accounting company.

The Accounting Link menu becomes the Sage Simply Accounting menu.



Importing Contacts from Sage Simply Accounting to Sage ACT!

You can import your Sage Simply Accounting customer and vendor records into Sage ACT! to quickly build a database of contacts.

Requirements

You must have Read access to Sage Simply Accounting to use the Import Accounting Records option.

You must have Read/Write access to Sage Simply Accounting to update linked customer and vendor records from Sage ACT!.

Access rights to Sage Simply Accounting are set by the Sage Simply Accounting system administrator (sysadmin user).

To import contacts from Sage Simply Accounting to Sage ACT!:

1. From the Sage Simply Accounting menu in Sage ACT!, select Import Accounting Records.
2. Select a Record Type to import.
3. Select individual records to import, or click Select All to import all records in the list.
4. Click OK to start the import process.
5. A Security Check window will appear if you have security turned on in Sage Simply Accounting. Enter your Sage Simply Accounting User ID and Password, and then select OK.

Linking Your Contacts to Sage Simply Accounting

When you import contacts from Sage Simply Accounting, they are automatically linked. That means you can view accounting data from Sage ACT! or synchronize contact data between Sage ACT! and Sage Simply Accounting. You can create a contact link, modify a link, or remove a link for individual contacts.

To create a new contact link:

1. Open the contact record you want to link.
2. From the Sage Simply Accounting menu, select Create/Edit Contact Link.
3. Select one of the options under Establish a Link.
4. Follow the onscreen instructions to set up the link.

Once you have linked a contact, you can view accounting information for that contact in Sage ACT!.

To view a list of all linked contacts, select View Linked Contacts Summary from the Sage Simply Accounting menu.

Viewing Accounting Data for Linked Contacts

For linked contacts, you can view accounting information from Sage Simply Accounting, including available credit, current balance, and recent history.

To view accounting data for a linked contact:

1. Open the contact record you want to view accounting information for.
2. At the bottom of the Contact window, select the Sage Simply Accounting tab.

Provided the contact is linked, accounting data appears in the bottom pane of the window.

Getting Help

There is a separate Help file for Sage ACT! Link for Sage Simply Accounting and accounting-related features. To open this file, select Accounting Link Help Topics from the Sage Simply Accounting menu, or press F1 from any of the windows available from the Sage Simply Accounting menu.

