act! Link4 MYOB®

Version 9

Link the following Act!® software:
- **Act! Pro & Premium v18-v21**
  (referred to as "Act!" in this guide)

to the following MYOB® software:
- **MYOB AccountRight 2014-2019**
- **MYOB AccountRight Live 2014-2019**
  (referred to as "MYOB" in this guide)

SETUP GUIDE

Developed since 2002 by

red onion software

MYOB®
Professional Developer

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Contents

Getting Started

Terminology

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

AFM   Act! Link for MYOB AccountRight v9.5
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)

What is Act! Link for MYOB AccountRight?

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, Print or export to Excel the MYOB quotes/orders/invoices for any Customer.
- 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.
- Create MYOB Quotes, Orders & Invoices from an Act! Opportunity or from scratch.
- Create Act! Opportunities from MYOB Quotes, Orders & Invoices.

What's New in Version 9.5?

This version adds the ability to create invoices in MYOB AccountRight Live 2014-2019 from Act!.

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);
- Limited Free telephone support & remote assistance.

Understanding the Installation Process & System Requirements

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* (windows service). Otherwise it is a computer used by someone as their workstation, in which case, you should use the *AFM Desktop Server* (system tray icon).

If your **MYOB** company file is stored on the same computer on which you wish to use **AFM** functionality, then you may install both **AFM Server** and **AFM Client** on the same computer. All **MYOB** users must access the company file in TCP/IP mode only (selected when logging into **MYOB**).

AFM Client communicates with **AFM Server** via a HTTP port. The default port is 65200, and this can be changed using the Server Administrator window. You must have Internet Protocol (TCP/IP) enabled (on by default), and ensure that it is not blocked by Windows Firewall, or other firewall software, even if you install both components on a single computer.

AFM Server requires a compatible version of **MYOB** & **Act!** installed on the same computer (see cover page); and the appropriate version of MYOB ODBC Direct for that version of MYOB. This is automatically installed when you install MYOB. You must meet the recommended requirements of the above software. We also suggest that you disable User Account Control on Windows 7, 2008 & Vista.

Both components require "Microsoft .NET Framework 4.0" to be installed. Most Windows computers will already have this component, and it is a requirement of Act!.

AFM Client requires a compatible version of **Act!** installed on the same computer (see cover page); and you must meet the recommended requirements for that software, including at least 1Gb RAM.

No sample **Act!** database is supplied with the Link. You may use your own **Act!** database (please backup first) or the sample database provided with your **Act!** software.
eg.   My Documents\Act\Act Data\Databases\Act2014demo.pad
The database must have 36-Character fields named "MYOB Customer Card UID" and "MYOB Supplier Card UID", however these fields can be created with a single click in the Server Administrator window. The field names are case-sensitive. They do NOT require dropdowns & do NOT need to be added to your **Act!** layout.

No sample MYOB company file is supplied with the Link. You can trial the link using the sample company file provided with your *MYOB Application* (eg. "Clearwater_Plus_AU.myox"). However before you use your own company file, please back it up first.

To use either a trial or paid version of the Link you must register the Link via the Internet.
Therefore you must have Internet access from the computer where you install AFM Server.

Is my MYOB data safe?
Yes. A password can be required each time an attempt is made to connect to the MYOB data.

Will my MYOB Backup procedure be affected?
No. AFM only connects to your MYOB company file for a moment when reading or writing, so you are not required to stop & start the service to perform a backup.

Pre-Installation Tasks

The Act! Link for MYOB comes with 2 components: AFM Server (Desktop or Enterprise), and AFM Client. The AFM **Server** component will need to be installed on the machine that hosts the MYOB database. The AFM **Client** component will need to be installed on the machine that you will be using ACT! on (Note: this may be the same machine).

1. If the MYOB company file is located on this computer, you will need to install the AFM <u>Server</u> component. Ensure that you have **MYOB** installed & meet the recommended requirements.

2. If you wish to use the AFM functionality on this computer you will need to install the AFM <u>Client</u> component. You should have **Act!** installed & meet the recommended minimum requirements.

3. You will also need to create a separate username in your MYOB company file for the link to use. Log into MYOB as "Administrator", click the Setup menu, then "User Access", then New User. Call the new user "AFM" & tick "Administrator" role. Click Save.
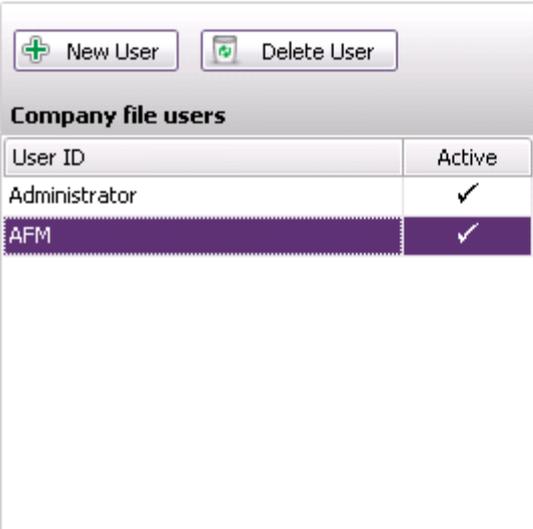

4. For Windows Vista, Windows 7, and Server 2008 you may need to disable User Account Control (UAC) for the AFM Server and/or AFM Client to function correctly. Go to "Control Panel" > "User Accounts" > "User Accounts" again if required > "Turn User Account Control on or off" or "Change User Account Control Settings" > Untick the box or move the slider to the lowest setting ("never notify") & click OK > then restart the computer.

Installing AFM Server

1. **Logon to Windows** as an administrator, and close any unnecessary applications.

2. **Run** AFM.DesktopServer.Setup.exe or AFM.EnterpriseServer.Setup.exe and complete the wizard as shown below:
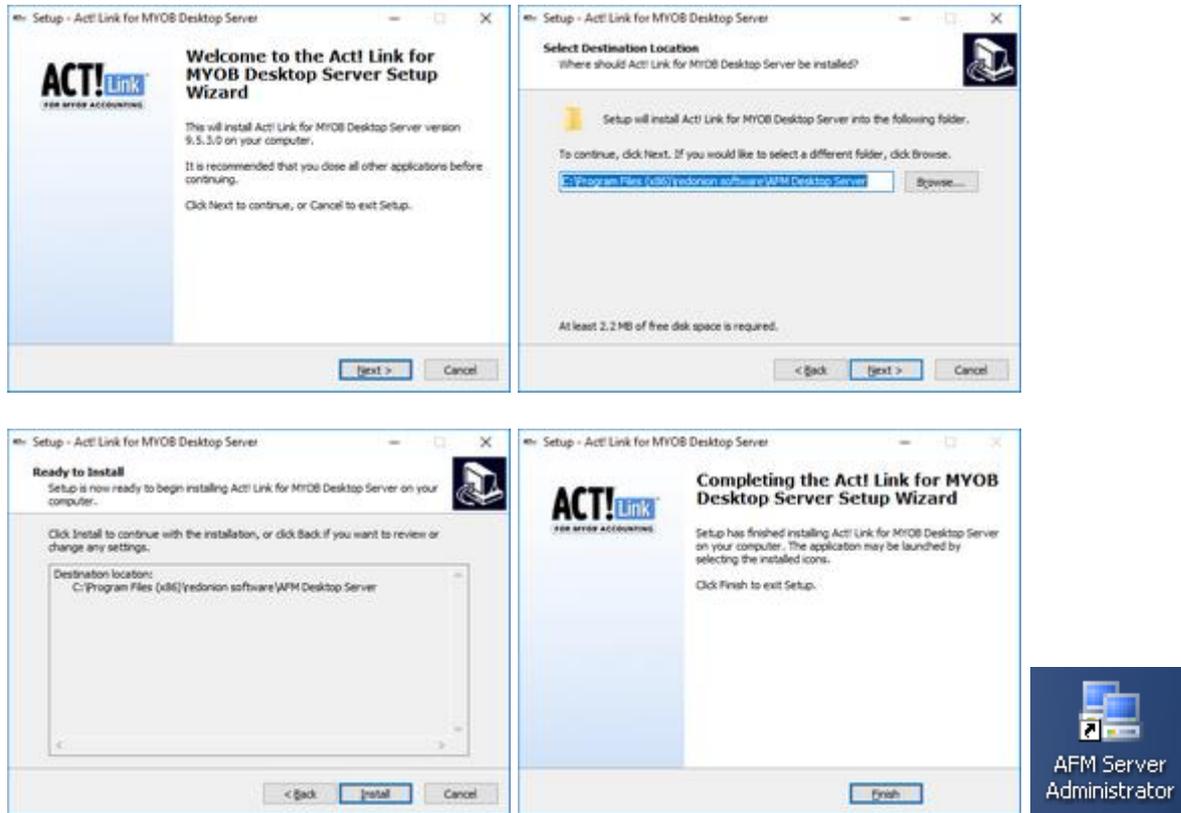

3. Open **AFM Server Administrator** using the desktop icon as shown above, or by running "C:\Program Files\redonion software\AFM Enterprise Server\AFMServerAdmin.exe"; or "C:\Program Files\redonion software\AFM Desktop Server\AFMServerAdmin.exe".

4. Under **Server Configuration**, select the type of server module you installed (Enterprise or Desktop), and the server name & port number that other computers will use to find the server. We suggest that you use the default port number 65200, otherwise you will need to change this on each workstation as well.

5. **If Desktop Server** is selected, you must double-click the **AFM Desktop Server** shortcut on the desktop before you can save the configuration (unless you have restarted the computer since installing it). When it starts you will see this message appear on the task bar:
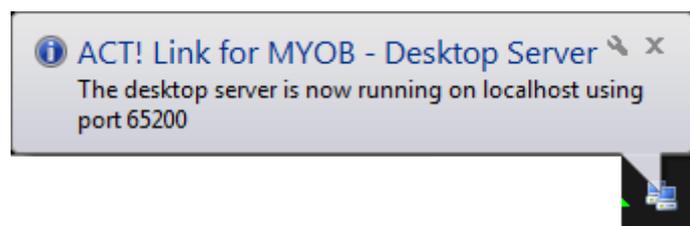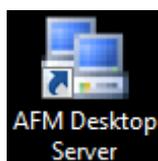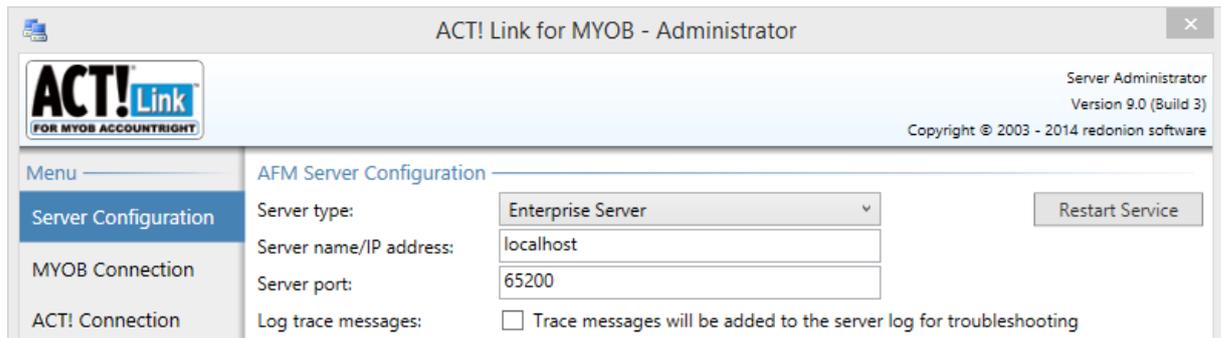
6. Click MYOB Connection in the menu. Unless otherwise advised by your MYOB consultant, set the MYOB API base URL to http://localhost:8080/accountright as shown below.

7. You can browse to the above address for a list of MYOB company files in your "library". Enter the name of your MYOB company file, preceded by a "\" as shown below. You can trial AFM with the "\Clearwater" sample company file, however if you wish to use your own company file, please back it up first.

8. Enter the **MYOB password** that you created for the AFM user account in MYOB. Note that you cannot use a different MYOB user name. You must then click the Save Changes button.

9. Click **Start Test** to test the connection. If this fails, see the last page of this guide.
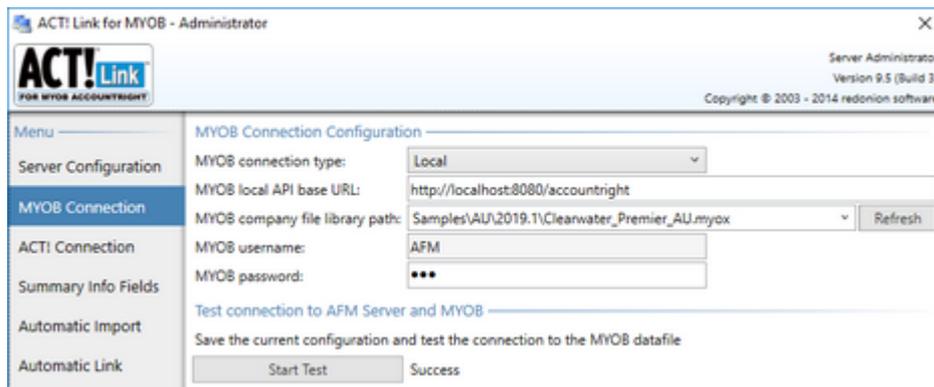

10. Click Act! Connection in the menu, browse to and select the ACT! database that you wish to link, and enter the username & password of an **Act! Administrator**.

8
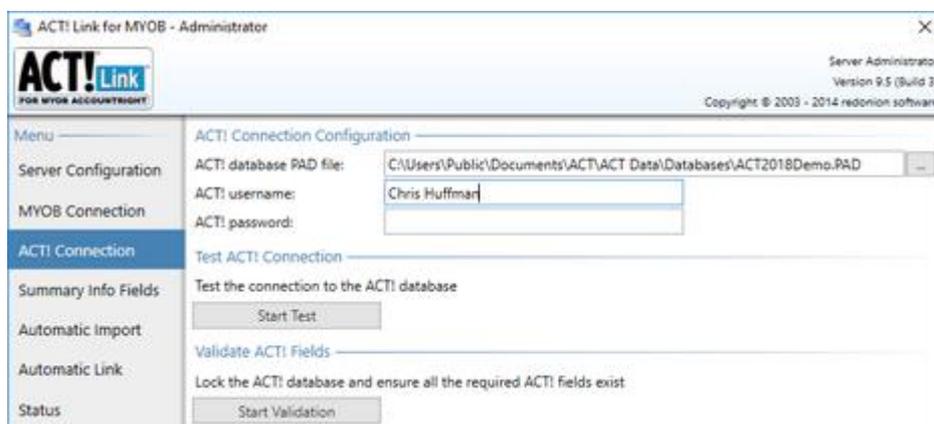
11. Click **Start Test** to test the connection. Then click Start Validation to create the required ID fields in your Act! database. If this fails, see the last page of this guide.

12. To allow other computers to use the link, you must configure the Windows Firewall and/or your Internet security (anti-virus, etc) software to allow the above port (eg. 65200) through it. You may need your system administrator or IT consultant to assist.

13. If you wish to restrict which people can use **AFM** on your network, click Server Configuration, think of a new password, and enter it next to "AFM password" & again next to "Repeat password" on the next line. **AFM Client** users must enter this password each time they connect to the **AFM Server**.

14. The Connection timeout is required because an unsuccessful attempt to write to MYOB could otherwise cause ACT! to freeze. However if you experience frequent timeouts (perhaps due to a large company file), you may need to increase the timeout (eg. to 60 seconds). If a timeout occurs, you may need to reboot the server to reset the MYOB ODBC Direct driver.

Installing AFM Client

1. **Logon to Windows** as an administrator, and close any unnecessary applications.

2. **Run** AFM.Client.Setup.exe and complete the wizard as shown below:
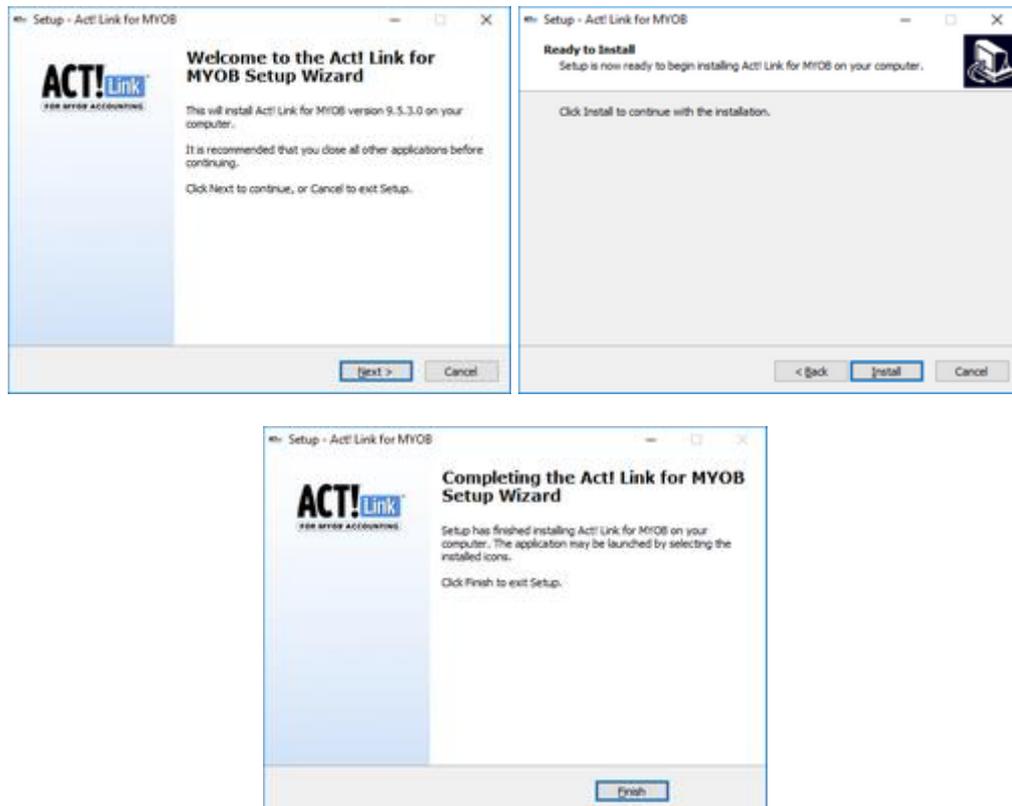
Starting ACT! Link for MYOB Accounting

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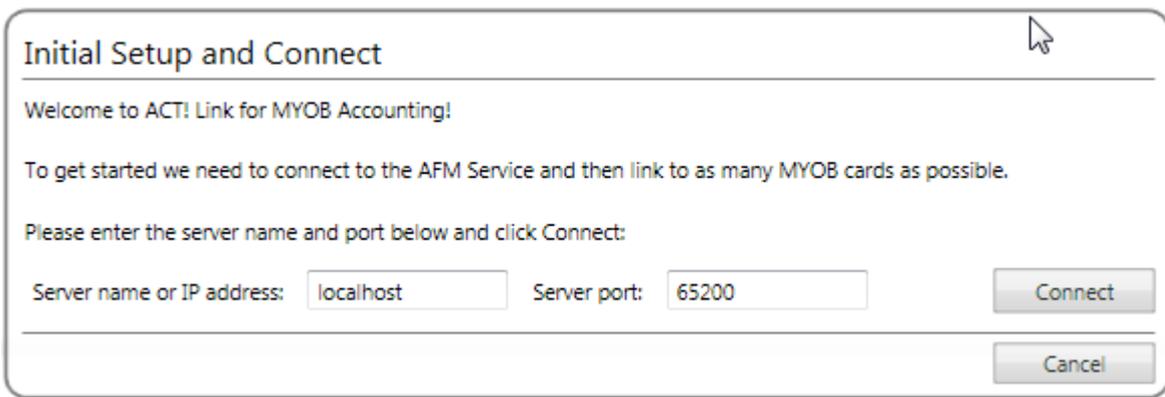
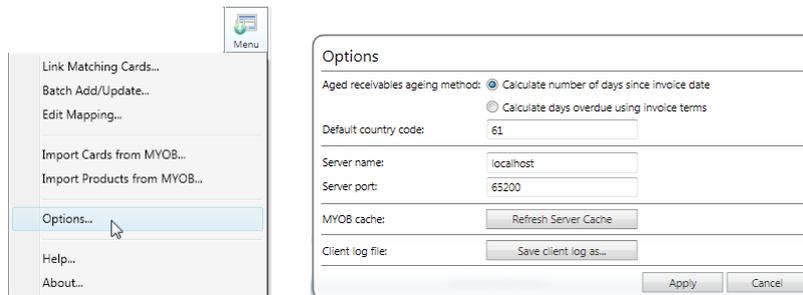If you don't see the above prompt, Click the *Menu* button in the ACT! Link for MYOB tab, and choose *Options*:

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:
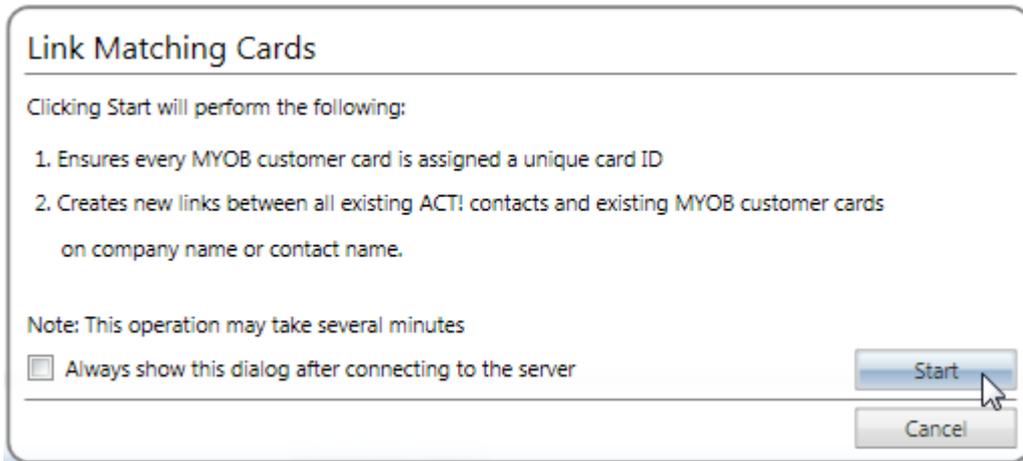
Link Matching Cards

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:
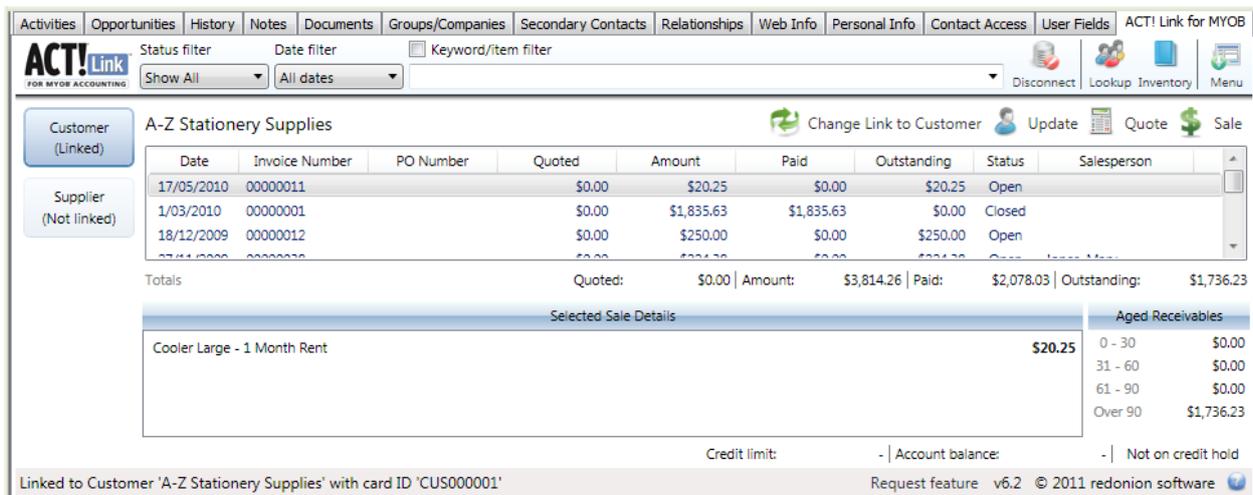

How does it know which MYOB card to show?

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.

Field Mapping

To change the field mapping, click the *Menu* button on the top right-hand corner of the ACT! Link for MYOB tab to view the Link menu, and select *Edit mapping…*
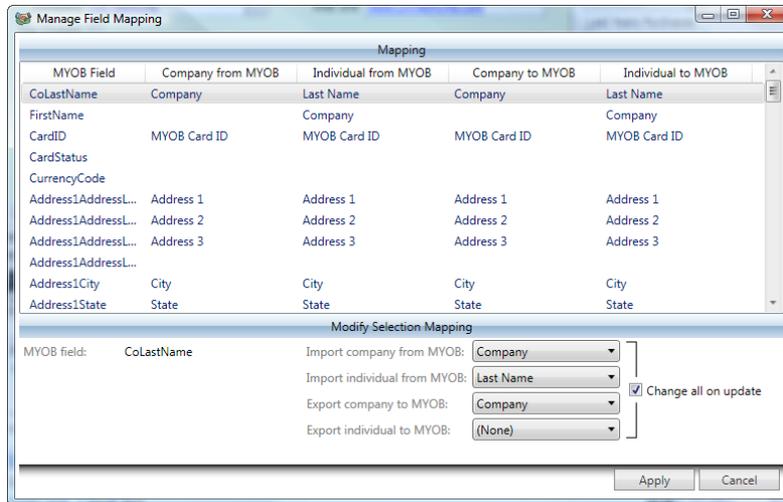

Caution: The Link has NOT been tested with all possible field mapping configurations. If you change the field mapping, please backup MYOB first, and then test the Add, Update and Import features to ensure the desired result is achieved.

Click on the MYOB field you wish to send information to, then in the dropdown box, choose the ACT! field that you want the data to come from. When you are finished, click Save changes.

Importing MYOB Customer cards into ACT!
IMPORTANT: PLEASE BACKUP YOUR ACT! DATABASE BEFORE YOU USE THIS FEATURE.
Always run Link Matching Cards before using this function. 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…*
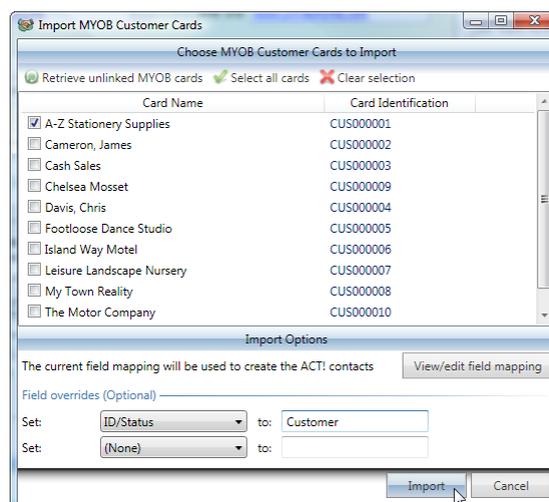

Select the MYOB cards that you wish to import. You can choose to set two ACT! fields to a specific value (eg. ID/Status = Customer). All other fields are determined by the field mapping (above). Click Import to complete the process. Please note that some MYOB customer cards will not be shown if they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

Registering AFM Server

Open AFM Server Administrator using the desktop icon or Start Menu, then click *Users & Licenses*.
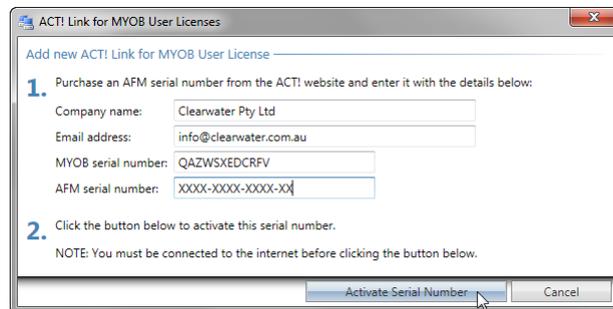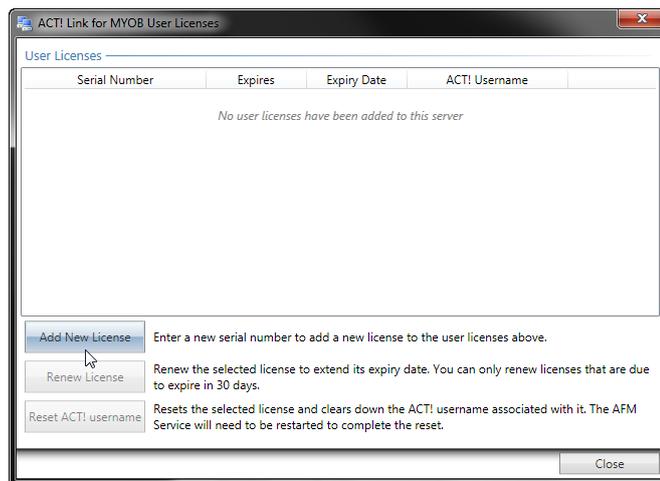
You must be logged on to Windows as an Administrator in order to register. You may also need to disable User Account Control, or use "Run as Administrator" when opening AFM Server Administrator.

Enter your company & email address so that we can notify you of any important issues
or any updates that we might release in response to those issues. Your contact details will not
be released to any other organisation. MYOB Australia requires that we collect your MYOB serial number as well. You can find this in your MYOB Accounting application, under the *Setup* menu, then *Company Information*.

Enter the **AFM** (User/Client) serial number you have purchased from an ACT! Certified Consultant or from www.redonionsoftware.com. Click *Activate Serial Number* to send this information to our Activation server (on HTTPS port 443), along with your computer's unique ID, which will Activate the license. After clicking Close, do NOT click Save Changes. Use the X in the top right corner.

Note that the first ACT! user to connect to the AFM Server after adding a license will be assigned to that license, and then only that ACT! user can use that license, unless you select the appropriate license and click *Reset ACT! username* to allow a different ACT! user to be assigned to that license.

Understanding ACT! Link for MYOB Accounting
(See separate User Guide)

Making the most of ACT! Link for MYOB Accounting

If you are not already working with an ACT! Certified Consultant (A.C.C.), 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

If you have difficulty installing or using the Link, you may wish to try the following:

1. Restart ACT! and/or the AFM Server service (in the Server Administrator window).
2. Temporarily disable firewall software, test, and then reconfigure if required (allow port 65200).
3. Open **MYOB** on the computer with AFM Server installed, and test that you can log in as "AFM".
4. Test while everyone has MYOB closed.
5. Ensure that you have met the system requirements & followed the install instructions.
6. For Windows Vista, Windows 7/8, and Server 2008/2012 you may need to disable User Account Control (UAC) for the AFM Server and/or AFM Client to function correctly. Go to "Control Panel" > "User Accounts" > "User Accounts" again if required > "Turn User Account Control on or off" or "Change User Account Control Settings" > Untick the box or move the slider to the lowest setting ("never notify") & click OK > then restart the computer.
7. Download & install/re-install the latest version from www.redonionsoftware.com.
8. Remove & re-install **MYOB** to the default location.
9. Contact red onion software or your local ACT! Certified Consultant.
10. Note that you can save the Server log file from the AFM Server Administrator window, and the client log file from the Options window (under Menu in the ACT! Link for MYOB tab) and email these to us.

Support

Your first support session is free of charge for one computer. Additional support is available for a fee.

Before you call the Helpdesk, please ensure that you have purchased Act! Link for MYOB; read the user guide, and check our web site for any recent updates.

Call the Helpdesk on 08 9389 4460; leave your name & phone number; and a consultant will contact you the following business day; or email actlink@redonionsoftware.com

You will need to have the Administrator password for your MYOB company file; and your server (if you have a server). Please also ensure that you have already installed your MYOB Accounting application on your server (if you have a server).