Implementing the Xact Link for ACT! and MYOB EXO

Xact Software is interested in clients getting the best experience they can from CRM/accounting integration and to maintain a high standard of operation for the product.

One way that we ensure this happens is by following a set of procedures. Below is a brief overview of these procedures plus a guide to the duration of each stage. All of the stages can be carried out via remote Internet connection i.e. Teamviewer, GoToAssist etc.

Stage 1 - Understanding the Workflow:

1) How is MOYB EXO currently being used & what CRM functions will be used in ACT!?
2) Account Based vs. Contact Based model?
3) How will the field mapping be handled between ACT! and MYOB EXO, for Contacts and for Companies? (*Note:* this analysis step is taken no matter how MYOB EXO is used as discussed during #2)
4) Who gets to do what? - Implementing the User Access Control.

Approximately 1 hour in total

Stage 2 - Setup of Xact Link for ACT! and MYOB EXO:

Client machine requirements:

- SQL Server Native Client 10.1
- A Compatible version of ACT! (ACT! 2010 and above)
- A Compatible version of MYOB EXO (MYOB EXO 7.0 and above)
- Mixed Mode Authentication

1) Modifying the ACT! database schema to Introduce custom tables to store the encrypted user Access System data.
2) Modifying the ACT products table.
3) Modifying the ACT contact record table to add link field(s)
4) Installation of the link
5) Configuring the link for each user , this is done for each individual user for both physical installs and for installs on TS environments

Approximately 15 minutes per user, with steps 1-3 only performed once per database.

Stage 3 - End User Training

45 minutes – 1 hour.

Example

For example, a 10 user site presuming all specifications are met, access to machines are available, all passwords are at hand and machines are in a good working condition.
1 + (10x .25) + .75 = Total of 4.25 hours + training