

## **General:**

Q – What is Xact Link for ACT and QuickBooks?

*A – Xact Link for ACT & QB is an add-on for the popular ACT contact Management system; the Link is developed by Xact software solutions.*

Q – What does the link do?

*A – The link connects ACT with your QB accounting product, by doing so it provides the ability to create QB Customer Records from ACT in addition to exposing some of QB accounting software functions to ACT.*

Q – What is the goal behind linking ACT with QB accounting products?

*A- The idea is to streamline the process of creating Customers and managing their information within the business as well as providing the front office staff with controlled access to customers financial data so that the staff can serve the customers more efficiently.*

Q – What other features does the link provide?

*A – The link adds the following features to ACT:*

- *Create QB customer records from ACT*
- *Link any existing contact record in ACT to a QB customer record*
- *View the Estimates, Sales Orders, Invoices and Aged receivables for QB customers from within ACT.*
- *Create QB Estimates, Sales Orders and invoices from within ACT*
- *Update the details of Customer Cards in your QB accounting product from within ACT*
- *Import / Export customer and contact records from / to QB & ACT*
- *Create PDF files from existing transactions and attach them to the customer's history tab or email them directly from within ACT.*

Q – How does the link work?

*A - Once installed the Link adds a new Tab to the ACT contact detail screen, it also adds a new Menu item under the ACT Tools menu.*

## **Prerequisites**

Q – What are the prerequisites for running the link?

A – *The following is a list of software and software components that need to be in place before you can successfully install and use the link:*

- *A supported version of ACT is installed and working with no issues*
- *A supported version of QB accounting software is installed and working with no issues*
- *Both installation of ACT and the QB software have the latest patches applied*

## **Compatibility:**

Q – Which versions of ACT is the link compatible with?

A – *The Link is compatible with the following version of ACT:*

- *ACT 9*
- *ACT 10*
- *ACT 11*
- *ACT 12*

Q – Are both standard and premium versions of ACT supported?

A – *Yes the link is compatible with both the premium and the standard versions of ACT*

Q – Does the link work with ACT premium for Web?

A – *The link can be installed under ACT premium for Web but it will only work within the Desktop interface*

Q – Which versions of the NZ / AU QB accounting products software are compatible with the Link?

A – *The link is compatible with the following versions of the QB accounting products:*

- *QB Accounting\* / Small Business\* / Plus\* / Pro / Premier 2004*
- *QB Accounting\* / Small Business\* / Plus\* / Pro / Premier 2005/06*
- *QB Accounting\* / Small Business\* / Plus\* / Pro / Premier 2008/09*
- *QB Accounting\* / Small Business\* / Plus\* / Pro / Premier 2009/2010*

*\* Some features will not be available for these editions (see below)*

Q – Is the link compatible with the 2007/08 version of QuickBooks for Australia and New Zealand?

A – *No, currently we do not support that version as it seems to have some issues recognizing 3<sup>rd</sup> party applications.*

Q – Is the link compatible with the 2006/07 version of QuickBooks for Australia and New Zealand?

A – *We have not tested it with this version. And we would appreciate if you could provide some feedback if you do have this particular version. 30 days demo is available for download on our website.*

Q – You mentioned above some features are not available on these editions, what are they?

A – *QuickBooks Accounting, Small Business and Plus editions does not support creating Estimate and Sales Order. These limitations are imposed by QuickBooks itself.*

Q – Which versions of the U.S QB accounting products software are supported?

A – *For the U.S versions of QB, Pro/Premier 2004 – 2010 are supported.*

Q – Is the link compatible with Windows Vista and 64 bit operating systems?

A – *Yes the link is compatible with Windows Vista and 64 bit operating systems, **however** some versions of ACT may not be.*

## **Installation:**

Q- How do I install the link?

A – *Installation is simple; all you need to do is to un-zip the software package and run the Setup.exe file, simply follow the installation instructions and make sure that the link is installed to the right directory.*

Q – Is there an installation reference guide?

A – *Yes, the link comes with a quick installation guides for both single and client-server scenarios in addition to a comprehensive user manual.*

Q – I have ACT installed on my machine but QuickBooks is installed on a separate machine can I setup the link to work under this configuration?

A – *Yes, you can install the link and configure it to run using the QuickBooks RDS technology which allows you to connect to a QB application which is running on a separate machine.*

Q – What is the difference between single user and client-server installations?

A – *Single user installations require that both ACT and QuickBooks reside on the same machine, with client server installations QuickBooks can reside on a different machine from ACT.*

Q – Is the installation process similar for both single user and client server scenarios?

A – *No, when installing the link in a client server scenario you need to install additional components and configure them on the machine running QuickBooks prior to installing the link, consult the manual or the Client server installation guide for more details.*

Q – Can I have ACT running while installing the link?

A – *It is strongly recommended that neither ACT nor your QB accounting software is running when installing the link.*

Q – Where should the link be installed?

A – *The installation directory is the Plugins sub directory which can be found under the ACT for windows or ACT for Web Folders. The default path for these folders is:*

*C:\Program Files\ACT\ACT for Windows\Plugins\  
C:\Program Files\ACT\ACT for Web\Plugins\*

Q – Do I need to be an administrator when installing the link?

A – *Yes you need to be logged on as an administrator when installing the link*

Q – Can I install the link without having ACT on my machine?

A – *Since the link is an integrated Add-on for ACT you must have a compatible version of ACT installed and running in order to use the link.*

## **Configuration**

Q – I have installed the link, how do I configure it to work with my QB accounting software?

A – *Provided the installation was complete and your system meets the prerequisites you will need to start up QuickBooks and login to your database first then start ACT. The link will prompt you to configure its settings the first time you start up ACT.*

*You can also access the configuration screen from ACT at anytime by going through Tools >> Xact Link for Act and QuickBooks*

Q – What is the QB user access password?

A – *The access password is used to allow an administrator to configure the user access rights for the link on a given machine, by doing so an administrator can setup the access rights for each ACT user who is utilizing the link.*

Q – I have installed the link and went through the setup wizard, after restarting ACT I can see the link tab but nothing is visible on the tab and I can only access the configure user access section in the preferences screen.

A – *By default the link's access settings are setup to full lockdown, you need to configure the user access settings for each individual ACT user, to do so navigate to an ACT user's record, and configure their access settings through the preferences screen, close and restart ACT when you're done.*

Q – What is the ACT Card ID field?

A – *The card ID field is used to store the QuickBooks customer ID in ACT, the ID is used to link an ACT customer to its respective QB record. Ideally your ACT administrator should create a field for that purpose prior to installing the link.*

Q – How do I setup the Xact Link to Link an ACT contact record with my QB company data file?

A- *Using the ACT! Card ID field (which is accessible through the Link's configuration screen) you can assign a contact field which will hold the link information between ACT and your QB accounting product.*

Q – Can I assign any field to hold the QB Id information?

A – *Yes, **however** it is very important that you choose a field that is not used to enter data at all or create a new field to hold the link information between ACT and your QuickBooks product data file.*

Q – My database has customised fields can I configure the link to map to them?

A – *Yes, the link can be configured to map your QB customers' fields to any ACT field of your choosing, keep in mind that when mapping fields you should only map field pairs of similar data types (e.g. mapping a character field in ACT to a number field in QB may result in data loss or corruption).*

Q – What is the email integration function used for?

A – *The email integration function is used to provide the option to send an existing transaction (Estimate or invoice etc) to an ACT customer; the transaction is converted to a PDF document and emailed as an attachment.*

Q – Can I customise the template used to create the PDF file?

A – *Yes, it is possible to customise the template to change the layout, add static text and images, to do so you will need some familiarity with HTML.*

Q – Is it possible to have more than one template?

A – *Yes but only one template can be active at a time, in future versions we plan to implement the ability to assign a template to each transaction type (e.g. Estimates Template, Invoices Template etc)*

Q - What can I use to edit the HTML template?

*A – It is possible to use Notepad or Wordpad, you can also use any of the freely available HTML editors such as Notepad ++*

### **Troubleshooting:**

Q – I configured the link and I tested the connection, I can see the Link's Tab but nothing seems to be working, what is wrong?

*A – After configuring the link you need to restart ACT for the changes to apply.*

Q – I have configured the link and restarted ACT but the QuickBooks tab in ACT is blank.

*A – You need to configure user access for each individual ACT user, by default the link operates in full lockdown mode, the link's feature need to be enabled by an administrator*

Q – I am using Windows Vista and I get an error message whenever I try to start ACT after installing the link.

*A – If running under windows Vista, make sure to start ACT as an administrator.*

Q – I have setup the link and it seems to be configured properly but whenever I try to use it I get an error message.

*A – this is possibly due to assigning an ID field that already contains data, make sure to assign an ID field that is used for nothing but the link, this field should be hidden from the contact detail view.*

Q – I have changed the contact layout in ACT and now all of my tabs are duplicates / cannot be accessed.

*A – This seems to be an issue that occurs from time to time in ACT which affects layouts and plugins that add their own tabs in the ACT detail view, the workaround is to restart ACT.*

Q - When switching between ACT Databases during the same session, some of the link features become disabled.

*A – This seems to be an issue with the way ACT handles some of its plugins, the workaround is to restart ACT.*

## **Contact and support:**

Q – I have a question that is not answered here, how can I contact you?

A – *Certainly, you can get our contact details through our website [www.Xactsoftware.co.nz](http://www.Xactsoftware.co.nz) or you can E-mail us at [Support@Xactsoftware.co.nz](mailto:Support@Xactsoftware.co.nz) , for sales you can email [Sales@Xactsoftware.co.nz](mailto:Sales@Xactsoftware.co.nz)*

Q – Do you offer any support packages?

A – *No, we offer support on case by case basis, all support requests are subject to Xact software's terms of service, you are welcome to contact us if you wish to obtain a copy of our Terms of Trade document.*

Q- What support methods do you offer?

A – *We offer Phone support, Remote support and on-site visits; please note that in some cases we may need to arrange a time in advance to assist with your support queries.*