

QuickStart for ACT! Link

for use with QuickBooks Pro/Premier 2002

Last revised: January 2, 2002

Welcome to ACT! Link

Thank you for choosing ACT! Link for use with QuickBooks Pro/Premier 2002, the fastest, easiest way to share information between ACT! and QuickBooks.

Once you install and configure ACT! Link, you can link contacts in ACT! and Quickbooks. Once these contacts are linked, you will be able to view important accounting data like customer account balances, aging summaries, and transaction details from inside ACT!.

This document will help you get up and running on ACT! Link quickly. It contains important information on:

1. Accessing Help
2. Installing ACT! Link
3. Starting ACT! Link
4. Using ACT! Link
5. Need Help? Technical Support Resources

To print this file, click the **File** menu and choose **Print**.

Accessing Help

You can find detailed information about configuring and using ACT! Link in the online Help system. The help file includes **Tips and Tricks** as well as **Known Issues**.

While using ACT! Link, you can access this help file at any time by pressing the **F1** key on your keyboard. To access the help file outside of the program, use the Windows Programs menu:

1. Click the Windows **Start** button in the lower left corner of your screen.
2. Point to **Programs**, then point to **ACT! Link**.
3. Click the icon for ACT! Link Help File.

To print Help topics

1. Click on any help topic.
2. Click the **Print** button.

A dialog box appears with options to print the selected topic or to print the selected heading and all subtopics. If you choose **Print the heading and all subtopics**, all topics contained in that help book will print.

Installing ACT! Link

1. Ensure that ACT!v5.x and Quickbooks Pro/Premier 2002 are installed.
2. Locate the directory where you downloaded the ACT!QblinkSetup.exe.
3. Double-click that file.
4. Follow the instructions that display on your screen.



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Starting ACT! Link

ACT! Link is always used from within ACT!.

Note: For detailed information about installing and starting ACT! link, refer to the Help topic: **Starting ACT! Link**.

1. Start ACT! and open your database.
2. Click the new QuickBooks tab at the bottom of your screen.

Before you can use ACT! Link the first time, you must configure it to work with Quickbooks.

Configuring ACT! Link to work with Quickbooks

The first time you start ACT! Link, you must specify the Quickbooks company file that ACT! will access. For detailed information on configuring ACT! Link, refer to the Help topic: **Configuring ACT! Link**.

Important: QuickBooks maintains security separately for each company file. If you ever need to use ACT! Link with a different QuickBooks company file, you will need to go through this configuration process again.

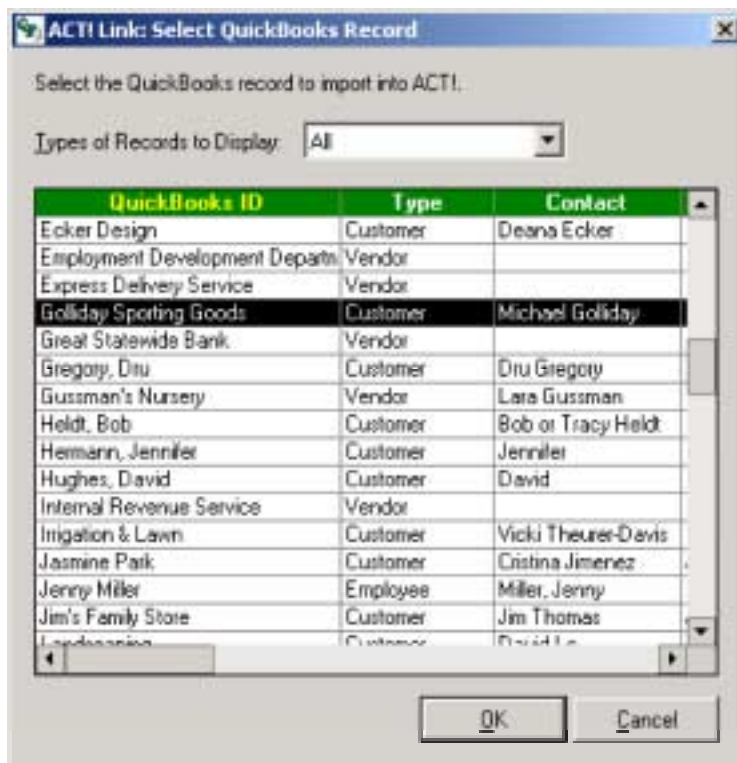
Once you have installed and configured ACT! Link, you can link ACT! and Quickbooks contacts.

Linking a contact

You must link contacts in ACT! and Quickbooks in order to view Quickbooks data for that contact within ACT!. For detailed information on linking contacts, refer to the Help topic: **Linking ACT! and Quickbooks Contacts**.

1. Click the **Create/Edit Contact Link**.

A new window appears showing all the contacts in your QuickBooks company file:



2. Select the matching QuickBooks contact and click **OK** to link them.

The balance, account summary and transaction list will appear immediately in ACT! Link, read live from QuickBooks.

As you move through your ACT! database, ACT! Link automatically updates its display to show information about the current contact, or tells you if the current contact is not linked. Links are permanent (until you remove them), so you need only link each contact once.

Need Help? Technical Support Resources

To learn more about ACT! and ACT! Link Customer Service and Technical Support solutions, visit the Web sites listed below or choose **Service and Support Information** from the Help menu in ACT!.

Contacting ACT! Service and Support

Support for ACT! is available at the Web sites listed below. If you cannot connect to the Internet, use the telephone numbers listed under Customer Service or Live Phone Support.

Customer Service

Visit our Customer Service Web site at service.act.com or call 877-386-8083 to learn about our support offerings and to get general information about ACT! features. You can also check the status of your order (or return), update your contact information, or order CD and manual replacements. Most inquiries can be answered online.

Online Technical Support

Visit our Technical Support Web site at support.act.com to access our online Knowledge Base, to view answers to Frequently Asked Questions, and to learn more about available support options.

Live Phone Support

Live phone support enables you to speak with an ACT! expert who can help you with all of your technical questions about ACT! and ACT! Link. Support is provided for 30 days at no charge. After 30 days, you can choose from a variety of fee-based options. Support is also provided on a 900 line, billed by the minute to your phone bill.

800 Telephone Technical Support: 800-927-3989
Free for 30 days

900 Telephone Technical Support: 900-225-2205
Charged on a per-minute basis

World Wide Service and Support

Customer Service and Technical Support options vary by country. For international service and support information, visit www.act.com.

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