

SAGE MAS 90 SAGE MAS 200



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## Sage MAS 90 and MAS 200 ACT! Link v1.1 Pre-Release Guide

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July 2006

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software

*Your business in mind.*

## TABLE OF CONTENTS

<b>Overview .....</b>	<b>3</b>
<b>Flexible Integration to Sage MAS 90 and 200 .....</b>	<b>3</b>
<b>View, Edit and Update Sage MAS 90 and 200 Data .....</b>	<b>7</b>
<b>Sage MAS 90 and 200 Tasks .....</b>	<b>8</b>
<b>Creating New Orders and Customers.....</b>	<b>9</b>
<b>Powerful Customization and Personalization Capabilities.....</b>	<b>10</b>
<b>Upgrading from Previous Version of ACT! Link.....</b>	<b>13</b>
<b>Upgrading from Previous Versions of ACT! .....</b>	<b>14</b>
<b>Partner Certification.....</b>	<b>14</b>
<b>Pricing.....</b>	<b>14</b>
<b>Availability .....</b>	<b>14</b>
<b>Retirements and Compatibility .....</b>	<b>14</b>

## Overview

Sage MAS 90 and 200 ACT! Link v1.1 creates a seamless connection between the latest version of ACT! by Sage and Sage MAS 90 and 200 ERP systems, leveraging their advanced integration capabilities. ACT! by Sage users are able to access Sage MAS 90 and 200 data directly from the ACT! desktop. Relevant Sage MAS 90 and 200 data is synchronized directly into ACT! using the ACT! Integration Framework. Transactions are posted back to the Sage MAS 90 and 200 system via the Sage MAS Business Object Interface.

ACT! Link creates a bi-directional integration from ACT! by Sage to Sage MAS 90 and 200 for real-time access to critical customer data. A salesperson can issue a sales order or view critical customer information such as invoice history, purchase history, sales order history, return orders and payment information directly from within ACT! by Sage. Back office employees are ensured that orders are posted accurately into the Sage MAS 90 and 200 system.

### Key Benefits

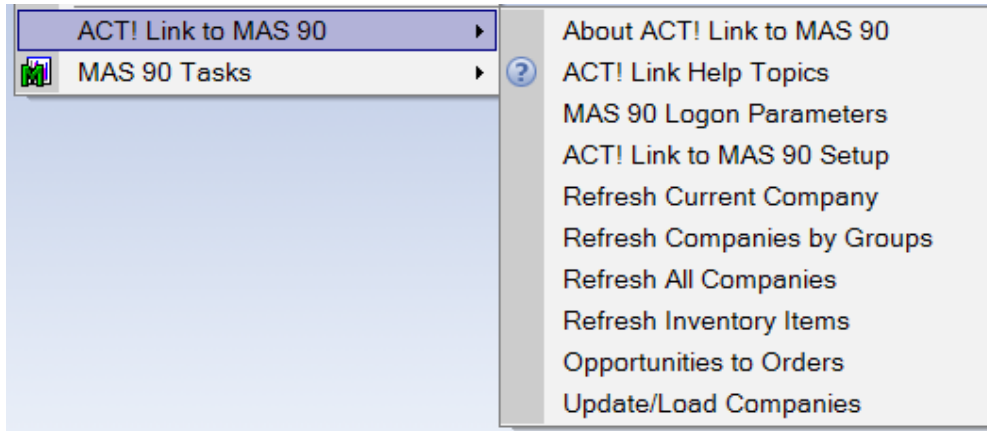
- ACT! Link provides a seamless user experience for front office employees accessing critical back office data for their customers in a familiar ACT! by Sage format.
- ACT! Link helps companies improve customer service efficiencies by providing immediate real-time access to critical customer data.
- ACT! Link helps companies build long term customer loyalty by empowering front office personnel with all the information that they need to better manage their customer relationships – such as communications, appointments, orders, and payments.
- ACT! Link improves data sharing and data integrity, reducing overall operational costs by reducing costly back office order processing errors.

## Flexible Integration to Sage MAS 90 and 200

ACT! Link automatically inserts new menus within ACT! by Sage enabling users to access critical customer Sage MAS 90 and 200 data. The new menus provide the ability to establish links to fields in Sage MAS 90 and 200, adjust for customizations, control how data is refreshed and establish default settings for new companies.

## ACT! Link Menus

Under the Tools menu within ACT! by Sage, ACT! Link provides new menu choices to control and manage the data that flows between the two systems. The options include:



- The **ACT! Link Setup** menu option is used to set the ACT! Link options, default settings, field mapping, advanced queries, and other options which control the synchronization and display of data.
- The **Refresh Current Company** menu option refreshes the Sage MAS 90 and 200 customer data in ACT! by Sage and all of the linked fields for the company and contact entities for the current selected company.
- The **Refresh Companies by Group** menu option allows the user to refresh the Sage MAS 90 and 200 data for all companies in a selected group.
- The **Refresh All Companies** menu option refreshes the Sage MAS 90 and 200 data for all linked companies in ACT! by Sage.
- The **Refresh Inventory Items** menu option refreshes or loads selected inventory items into ACT! by Sage.
- The **Opportunities to Orders** menu option converts selected opportunities to orders or quotes in the back office, creating new customer records if needed.
- The **Update / Load Companies** menu option loads or updates company information from selected Sage MAS 90 and 200 customer records.

## Configuring ACT! Link

The ACT! Link setup process defines key customer information and how that information is handled. Initial setup includes:

- Establish password protection for access to the ACT! Link setup options to prevent unauthorized changes.
- Connect to the Sage MAS 90 and 200 ERP system and read available company information.
- MAS 90 and 200 companies are populated into the Sage MAS 90 and 200 Company drop-down list.

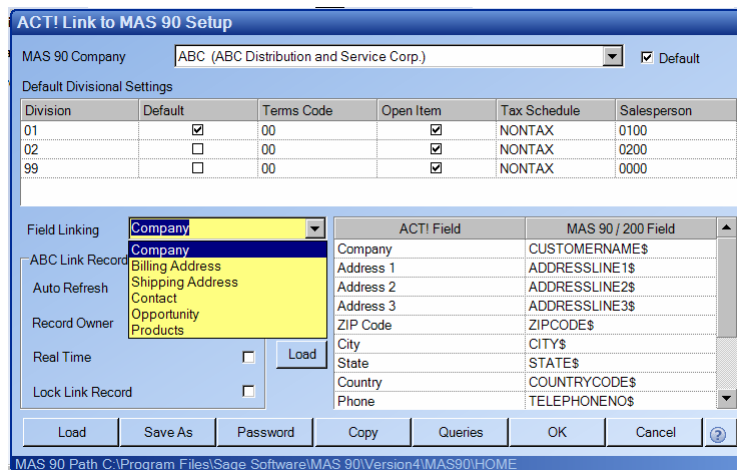
- Connect multiple Sage MAS 90 and 200 companies to a single ACT! by Sage database and multiple Sage MAS 90 and 200 Customer records to a single ACT! by Sage Company record.
- Establish the default settings for new customer records in ACT! by Sage.

## Field Linking

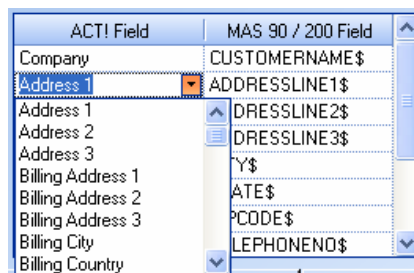
To meet specific customer needs and to accommodate any customization on the Sage MAS 90 and 200 system, the fields in ACT! by Sage that will be “linked” to the fields in Sage MAS 90 and 200 can be modified on a company basis. Optimize visibility to critical information and adjust accordingly for each Sage MAS 90 and 200 customer using the Field Link option.

For example, the ACT! by Sage entities that may be linked to Sage MAS 90 and 200 objects are:

- ACT! by Sage company to Sage MAS 90 and 200 customer
- ACT! by Sage company billing address to Sage MAS 90 and 200 ship-to code “BILL”
- ACT! by Sage company shipping address to Sage MAS 90 and 200 ship-to code “ACT1”
- ACT! by Sage contact to Sage MAS 90 and 200 customer contact
- ACT! by Sage product to Sage MAS 90 and 200 inventory item
- ACT! by Sage opportunity to Sage MAS 90 and 200 sales order



- Linking fields is as simple as clicking the field you want to change and selecting a new field from the drop-down list of available fields. Included in the choices are all user defined fields (UDFs) that have been customized from both ACT! by Sage and Sage MAS 90 or 200.



Add or delete as needed to meet the specific configuration requirements.

- The ACT! Link record defaults allow the user to specify the default settings for a new Sage MAS 90 and 200 customer because these defaults are set and stored separately.
- Locked Fields are fields that have one way synchronization ONLY either from ACT! by Sage to Sage MAS 90 and 200 or from Sage MAS 90 and 200 to ACT! by Sage. For more information, refer to the Sage MAS 90 and 200 ACT! Link Help system.
- Field linking also allows for literal values to be used.

ACT! Field	MAS 90 / 200 Field
State	STATE\$
ZIP Code	ZIPCODE\$
Phone	TELEPHONENO\$
Extension	TELEPHONEEXT\$
Fax Phone	FAXNO\$
Web Site	URLADDRESS\$
25000.00	CREDITLIMIT

In this example 25000.00 is placed in the Sage MAS 90 and 200 Credit Limit field.

## Refresh Inventory Items

Before creating a new quote or order, to ensure that sales people have current pricing and inventory information, choose Sage MAS 90 Task Refresh Inventory. ACT! Link synchronizes to the current Sage MAS 90 and 200 inventory items.

Select	Compa.	Item Code	Type	Item Description	Unit Price	Unit Co.	Price Co.	Drop Sh.	Retur.	PriceB
<input type="checkbox"/>	ABC	1001-HON-H252	1	HON 2 DRAWER LETTER FLE W/...	\$84.00	\$32.75	STD	N	Y	Y
<input type="checkbox"/>	ABC	1001-HON-H252	1	HON 2 DRAWER LETTER FLE W/...	\$87.00	\$35.75	STD	N	N	N
<input type="checkbox"/>	ABC	1001-HON-H254	1	HON 4 DRAWER LETTER FLE W/...	\$131.00	\$82.50	STD	N	N	N
<input type="checkbox"/>	ABC	1001-HON-H254	1	HON 4 DRAWER LETTER FLE W/...	\$135.00	\$86.50	STD	N	N	N
<input type="checkbox"/>	ABC	2480-8-50	1	DESK FILE 8" CAP 50	\$34.95	\$15.75	STD	N	Y	Y
<input type="checkbox"/>	ABC	2481-5-50	1	DESK FILE 5 1/4" CAP 50	\$19.95	\$7.98	STD	N	N	Y
<input type="checkbox"/>	ABC	2551-3-50	1	DESK FILE 3 1/2" CAP 50	\$24.95	\$11.23	STD	N	N	Y
<input type="checkbox"/>	ABC	2568-3-25	1	DESK FILE 3 1/2" CAP 25	\$12.95	\$5.83	STD	N	N	Y
<input type="checkbox"/>	ABC	4886-18-14-3	1	PAPER CADDY 18"W 14"D 3"H	\$45.00	\$22.75		N	N	Y
<input type="checkbox"/>	ABC	6650-26-16-11	1	SOUND CVR 26"W 16"D 11"H DM	\$259.00	\$137.80		N	N	Y

ACT! Link loads available items from all configured Sage MAS 90 and 200 companies into the grid shown above. (The data in the above grid can be grouped, sorted, and filtered. For more information, see Powerful Customization and Personalization Capabilities in this document.)

## View, Edit and Update Sage MAS 90 and 200 Data

One of the primary benefits of ACT! Link is to provide front office personnel access to important Sage MAS 90 and 200 back office data within the familiar and powerful ACT! by Sage format. Utilizing Data Tabs technology, ACT! Link adds new tabs to ACT! by Sage that provide quick access to a wide variety of information from the Sage MAS 90 and 200 system. The information displayed on each tab can be personalized and sorted for each company.

Accounting Links | Accounting Data | Invoice History | Sales Orders | Open Invoices | Payments | Return Orders | Item Sales | Last Purchase History | Job Information | Work Orders

Drag a column header here to group by that column.

Customers

Customer Name	Address 1	Address 2	Address 3	City	State	Zip Code	Country	Main Phone
Avnet Processin...	3361 W. Kenosha	Powers Building	Suite 100	Racine	WI	53120	USA	(414) 225-2635

Customers>InvoiceHeader

Invoice #	Module	Type	Invoice Date	Terms Code	Tax Schedule	Customer PO	Comment	Due Date
0100043	A/R	IN	5/21/2010	01	WI			6/20/2010

Customers>OrderHeader

Order #	Order Date	Type	Status	Ship Date	Bill To Name	Bill To Address 1	Bill To Address 2	Bill To Address 3
0000105	4/20/2010	M	O	4/20/2010	Avnet Processin...	3361 W. Kenosha	Suite 100	

Customers>OpenInvoice

Invoice #	Type	Invoice Date	Due Date	Discount Date	Posting Date	Terms Code	Tax Schedule	Comment
0000102	IN	5/21/2010	5/20/2010			01	WI	
0000170	IN	5/29/2010	6/28/2010			01	WI	
0100043	IN	5/21/2010	6/20/2010		5/31/2010	01	WI	
APR0002	FC	4/30/2010	4/30/2010					
0000142	IN	3/31/2010	4/30/2010			01	WI	FINANCE CHA
0000123	IN	2/28/2010	3/30/2010		5/21/2010	01	WI	
0000102	IN	1/31/2010	3/2/2010		5/15/2010	01	WI	

Customers>Payments

Invoice #	Type	Transaction Date	Check #	Payment Date	RMA #	Payment Amount
0000123	IN	5/31/2010	22805	5/21/2010		\$440.00
0100043	IN	5/31/2010	683245	5/31/2010		\$1,000.00
0000102	IN	5/15/2010	99-453	5/15/2010		\$595.00
0000123	IN	5/15/2010	99-453	5/15/2010		\$155.00

The following information tabs are automatically added:

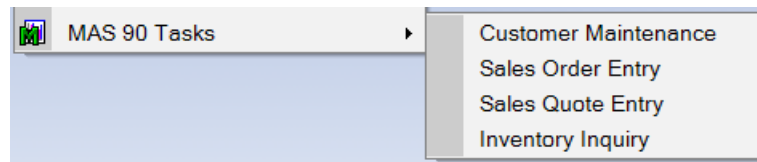
- The **Accounting Links** tab displays all the Sage MAS 90 and 200 customer links configured for the selected ACT! by Sage company.
- The **Accounting Data** tab displays standard customer accounting information such as name, address, credit limit, and aging balances.
- The **Invoice History** tab displays sales invoice history records with line item details, and lot/serial number information.
- The **Sales Orders** tab displays current sales orders and sales quotes for the selected Company (MAS 90 and 200 customer).
- The **Open Invoices** tab displays current open invoices in the Sage MAS 90 and 200 Customer records.
- The **Payments** tab displays current Sage MAS 90 and 200 customer payment history information, such as date payment received, and amount
- The **Return Orders** tab displays current open return orders for the selected company.
- The **Item Sales** tab displays current Item sales history for the selected company.

- The **Last Purchase History** tab displays the company's item last purchased information.
- The **Job Information** tab displays current job cost information for any open jobs for the selected company.
- The **Work Orders** tab displays all open work orders.

Each data grid can be personalized, resized, and displayed in a table view, or a card view. When the data is displayed in the table view format, users can utilize drill-down capability for viewing associated Sage MAS 90 and 200 customer data in a single grid.

## Sage MAS 90 and 200 Tasks

Clicking the Sage MAS 90 and 200 Tasks menu allows direct access into the Sage MAS 90 and 200 data entry windows:



- ACT! Link Customer Maintenance provides the current Sage MAS 90 and 200 customer information so the data can be grouped, sorted, and filtered.

Update / Load Companies

Drag a column header here to group by that column.

Select	Company	Division #	Customer #	Customer Name	Address 1	Address 2
<input type="checkbox"/>	ABC	01	ABF	American Business Futures	2131 N. 14th Street	Suite 100
<input type="checkbox"/>	ABC	01	AVNET	Avnet Processing Corp	3361 W. Kenosha	Powers Building
<input type="checkbox"/>	ABC	01	BRESLIN	Breslin Parts Supply	2035 N. Molalla Ave	Suite 15-C
<input type="checkbox"/>	ABC	01	HILLSB	Hillsboro Service Center	200 Union Street	Upper Level
<input type="checkbox"/>	ABC	01	RSSUPPL	R & S Supply Corp.	Eighth Street Annex	4321 W. 43rd Stre
<input type="checkbox"/>	ABC	01	SHEPARD	Shepard Motorworks	2215 English Ave	
<input type="checkbox"/>	ABC	02	0000026	Macdonald Consulting Group, In	1100 Johnson Ferry Rd.	Suite 450
<input type="checkbox"/>	ABC	02	ALLENAP	Allen's Appliance Repair	18026 E. 10th	Rear Building
<input type="checkbox"/>	ABC	02	AMERCON	American Concrete Service	11733 Cardinal Circle	
<input type="checkbox"/>	ABC	02	AT07	A To Z Carpet Sunlvt	1805 Newmont Blvd	

Enable Company Name Matching

Accept Cancel

- The Sales Order or Sales Quote entry starts a new sales order or sales quote that has been populated with the division number, customer number, and next order number. If the current ACT! company is not linked to a Sage MAS 90 and 200 customer, then the user can create a new customer.
- Inventory Inquiry allows the ACT! user to look up item information before creating a sales order or to provide the customer with details or alternatives.

## Creating New Orders and Customers

Increase productivity by using the power of ACT! Link to streamline the process of creating a new customer in Sage MAS 90 and 200 and generating a sales order or sales quote.

### Converting Opportunities to Orders

Save valuable time and generate a new customer on the fly when the company record for the ACT! by Sage opportunity you are promoting is not linked to a Sage MAS 90 and 200 customer record. There is no double entry because all relevant information in ACT! by Sage is passed to the Sage MAS 90 and 200 system to generate a sales order or sales quote, including contact information and shipping and billing addresses.

Create	Company	Division	Customer	Company	Contact	Gross Mar.	Product To.	ActualCloseD.	Associates
Skip	ABC	01		Modern Electric Su...	Thomas Andr...	\$835.89	\$1,460.39	1/1/0001	Modern Electr...
Skip	ABC	01		Boomer's Artwox	Emily Dunn	\$484.05	\$675.00	1/1/0001	Boomer's Art...
Skip	ABC	01		Freemont Corp	Dylan Nguyen	\$3,532.66	\$5,850.16	1/1/0001	Freemont Corp
Skip	ABC	01		Tiny Town Producti...	Ashley Allan	\$278.84	\$427.59	1/1/0001	Tiny Town Pr...
Skip	ABC	01		Ace Pet Store	Sandy Ryan	\$806.50	\$1,062.50	1/1/0001	Ace Pet Store
Skip	ABC	01		MiniSoft	Anthony Fede...	\$146.93	\$251.93	1/1/0001	MiniSoft
Skip	ABC	01		Brushy's Golfing W...	Paul Brushman	\$238.65	\$452.15	1/1/0001	Brushy's Golf...
Skip	ABC	01		Brushy's Golfing W...	Paul Brushman	\$1,935.00	\$3,150.00	1/1/0001	Brushy's Golf...
Skip	ABC	01		Jake Flakes Inc.	Rudy Nordstr...	\$617.47	\$1,434.52	1/1/0001	Jake Flakes I...
Skip	ABC	01		Swing Software	Ivan A. Steko...	\$949.00	\$1,999.00	1/1/0001	Swing Softwa...
Skip	ABC	01		Circle Photography	Jonathan Jen...	\$801.00	\$1,440.00	1/1/0001	Circle Photogr...

- Quickly locate the preferred opportunities and choose **Order** or **Quote** directly from the **Create** column to convert the information into a **sales** order or **sales** quote in the Sage MAS 90 and 200 system. Choosing **Skip** will have no effect on the selected record.
- Opportunities are easily converted into new Sage MAS 90 and 200 customers with the click of the **Create Sage MAS 90 Customer** button in ACT! by Sage. At that point, ACT! by Sage users can personalize the system's default settings before finalizing their sales quote or sales order, such as entering special one-time pricing, or linking a new location for an existing customer number.

Company	Division	Customer	Auto Refresh	Master	Real Time	Primary	Last Refresh
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- ACT! Link ensures that the information is available to all users by immediately updating the link record for the ACT! by Sage company and refreshing the accounting data from Sage MAS 90 and 200.

Activities	Opportunities	Documents	Addresses	Company Info	Accounting Links	Accounting Data	In
Company	Division	Customer	Auto Refresh	Master	Real Time	Primary	Last Refresh
▶ ABC	02	0000026	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3/13/2006
*							

Documents	Addresses	Company Info	Accounting Links	Accounting Data	Invoice History	Sales Orders	Open Invoices	Payments	Return <
Drag a column header here to group by that column.									
OrderHeader									
Order #	Date	Type	Status	Bill To Name	Bill To Address 1	Bill To Address 2	Bill To Address 3	Bill To City	Bill To State
0000294	3/13/2006	Q	N	Macdonald Cons...	1100 Johnson F...	Suite 450		Atlanta	GA
OrderHeader->OrderDetail									
Item #	Item Description	Qty Ordered	Qty Shipped	Backordered	Unit Price	Unit Cost	Extension		
1001-HON-H254LK	HON 4 DRAWER LETTER FLE W...	4.00	0.00	0.00	\$127.00	\$87.25	\$508.00		
1001-HON-H254	HON 4 DRAWER LETTER FLE W...	4.00	0.00	0.00	\$124.00	\$83.50	\$496.00		

## Powerful Customization and Personalization Capabilities

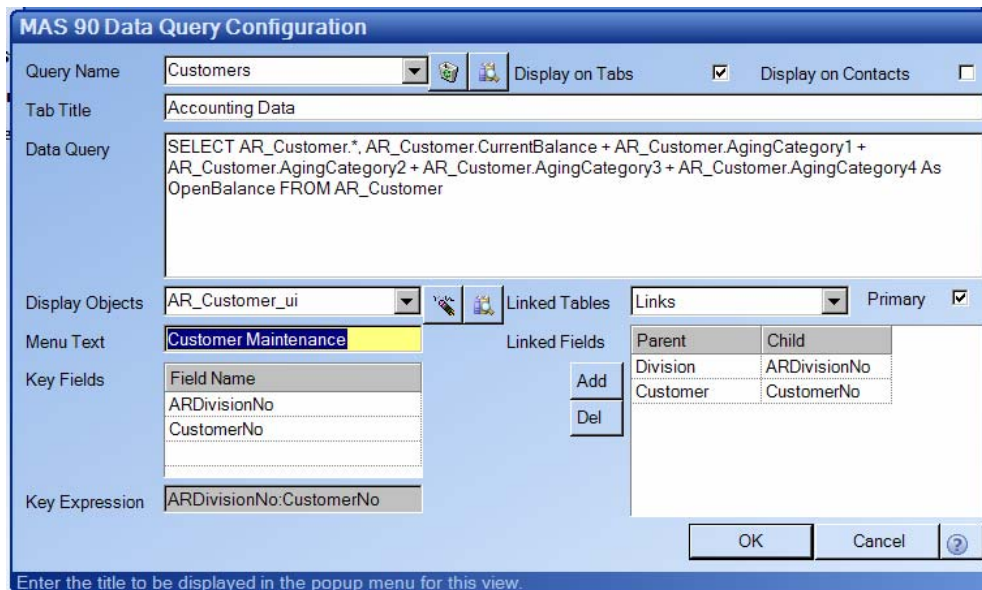
Use ACT! Link to provide better customer service through information and analysis. With ACT! Link, ACT! by Sage users can profile customers, analyze buying patterns, look up an answer for a customer when they ask their question instead of waiting for hours or days. Information can be printed or exported (such as a purchase history) to share with others in the organization or send to customers. ACT! by Sage users in the workgroup environment can log on at other workstations and have their own ACT! Link configuration, grid layouts, and “sticky” filters because personalized and customized settings are stored on the ACT! User record.

Notes	History	Activities	Opportunities	Groups/Companies	Secondary Contacts	Documents	Contact Info	User Fields	Home Add
Dates: All Dates <input type="button" value="Select Users"/>									
Date	Time	Regarding							
3/30/2006	11:33 AM	MLink! Configuration							

- Administrators can customize ACT! Link by user type, such as for TeleSales or Customer Service, establish common settings for those groups, and use **Copy** to duplicate the current ACT! Link setup for other ACT! users on the team.



- Administrators can also customize the tabs that appear for each user with ACT! Link data queries. These tabs provide users with one-click information on the company and contact level as well as drill-down capabilities for more details.



## Grid Personalization, Groups and Sorts

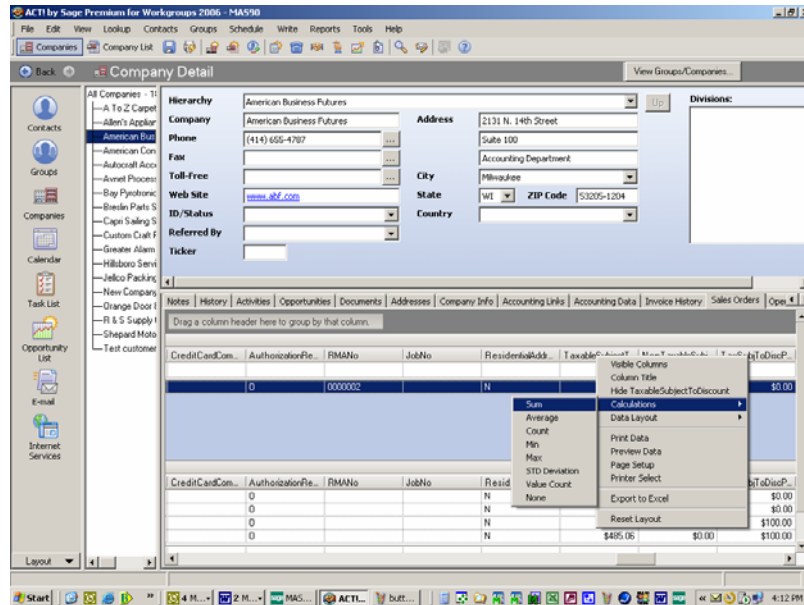
For optimum benefit and to further target information about or for a particular customer, each user can apply powerful tools to personalize the fields displayed in the grid.

- Users can sometimes find information faster by renaming what the system assigns to **Column Titles**, to accommodate their specific Sage MAS 90 and 200 system information contained in a column.

- Grid fields can be moved around so that important information can be found quickly at the beginning of the grid or viewed side-by-side. Simply click and drag the column to the desired display location.

Order#	OrderDate	Type	Status	ShipExpire	Div#	ConfirmTo	Name	ShipToAddress	ShipToCity	ShipToState	ShipToZipCode	ShipVia	ConfirmTo	Sh
0000156	5/15/2010	S	N	5/31/2010	02	ATOZ	A To Z Carpet S...	1805 Newport...	Newport Bea...	CA	92661	UPS BLUE	Allen Ableson	
0000104	4/20/2010	R	O	4/20/2010	02	ATOZ	A To Z Carpet S...	1805 Newport...	Newport Bea...	CA	92661	UPS BLUE	Allen Ableson	00

- For each customer, users can hide unimportant grid fields, or restore a previously hidden column. To hide, drag and drop the column completely outside of the grid. To restore, right-click and select **Visible Columns**.
- Calculations such as **Totaled** and **Sub-Totaled** can be added to provide even more information in the grid fields.



- All grid changes are saved as they are made, so work is not lost when a user clicks on another company or goes to another application. Unexpected grid results or unwanted changes can easily be reset by clicking **Reset Layout**.
- Users can share information in the data grids with customers or others in the organization by exporting to Excel or printing.
- Within the grids, the data displayed can be further grouped and sorted by any available field in the record. For example, collections can utilize **Due Date** to sort and identify customers they want to contact.

- Filters can be applied to further sort the data and get to the details that the user needs. In this example, under the Invoice tab, the user has filtered the data in the column **Type** to display only information relating to the category of invoices (IN) and filtering out other data such as credit memos (CM).

InvoiceHeader										
Invoice #	Module	Type	Invoice Date	Terms Code	Tax Schedule	Customer PO	Comment	Due Date	Dis	
		IN								
+ 0100033	S/O	IN	4/15/2010	01	WI	XX-890200		5/14/2010	4/1	
+ 0100034	S/O	IN	5/15/2010	01	WI	AJ-890123		6/14/2010	5/1	
+ 0100041	S/O	IN	5/31/2010	01	WI	789		6/30/2010	5/2	
+ 0100042	A/R	IN	5/21/2010	01	WI MILMIL		Ship same day.	6/20/2010	5/2	
+ 0100048	S/O	IN	5/30/2010	01	WI	789		6/29/2010	5/2	
+ 0100054	S/O	IN	3/1/2010	01	WI	3456		3/1/2010	4/1	

## Advanced Customization Using Virtual Queries

To accommodate unique needs, ACT! Link can be further customized by trained Sage Software business partners, or an expert system administrator, using the Virtual Queries tool. This powerful tool creates new informational tabs in ACT! based on information from existing queries. Because these queries use existing data from another query, they don't bog down the system or require any additional data storage.

MAS 90/200 Data Query Configuration

Query Name: 2010 Item Sales    Display On Tabs:     Display On Contacts:

Tab Title: 2010 Item Sales

Data Query: {ItemSales}

Display Objects: IMWIAA    Linked Tables:    Primary:

Menu Text: Inventory Inquiry    Linked Fields: Parent | Child

Key Fields: Field Name, ItemNumber    Add, Del

Key Expression: ItemNumber

OK    Cancel

Enter the query string to read the data from MAS 90/200.

## Upgrading from Previous Version of ACT! Link

Existing ACT! Link customers have a full migration path moving forward. ACT! Link v1.1 for Sage MAS 90 and 200 supports both Sage MAS 90 and 200 4.1 and 4.2 with Act! by Sage 2007 or higher. Users are provided with a Sage MAS 90 object interface key at no additional cost because ACT! Link leverages the Sage MAS Business Object

Interface to post transactions back to Sage MAS 90. Unlike the previous ACT! Link product, the new ACT! Link v1.1 for Sage MAS 90 and 200 must be installed into the ACT! by Sage 2007 Plugins folder of the end user workstation. Users will install ACT! Link and then be able to resynchronize customers and contacts.

## Upgrading from Previous Versions of ACT!

Sage provides upgrade instructions from ACT! 2000 to ACT! by Sage 2007 as part of the auto-ship package to customers.

## Partner Certification

All Sage Software business partners and ACT! by Sage certified consultants are required to be certified on Sage MAS 90 and 200 ACT! Link in order to sell and implement the solution. For more information refer to the current schedule on the Sage Software Partner File Center.

## Pricing

ACT! Link List Price is \$450 for new customers, a special price of \$90 as a subscription benefit to existing Sage MAS 90 and 200 customers on the Maintenance plan, and is provided at no charge to our current ACT! Link and Sage MAS 90 and 200 customers on the Maintenance plan.

## Availability

ACT! Link for Sage MAS 90 and MAS 200 version 1.1 is scheduled for release late September 2006. ACT! Link will be sold by both Sage Software business partners and ACT! by Sage certified consultants. ACT! 2007 Standard Edition, for users up to 10, is also available to Sage Software business partners. In order to attain the correct volume discount for their larger customers on ACT! 2007 Premium Edition, Sage Software business partners should pursue opportunities for sales of 10 or more users with ACT! by Sage certified Consultants. Additional details will be provided at a later date.

## Retirements and Compatibility

Sage will continue supporting existing ACT! 2000 and Sage MAS 90 level 3.71 after the Sage MAS 90 version 4.05 with the previous version of ACT! Link. ACT! Link 1.1 will be compatible with Sage MAS 90 version 4.10 or greater. An updated Integrated Solutions Compatibility Matrix will be provided at a later date.



*Your business in mind.*

SAGE MAS 90	SAGE MAS 200
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