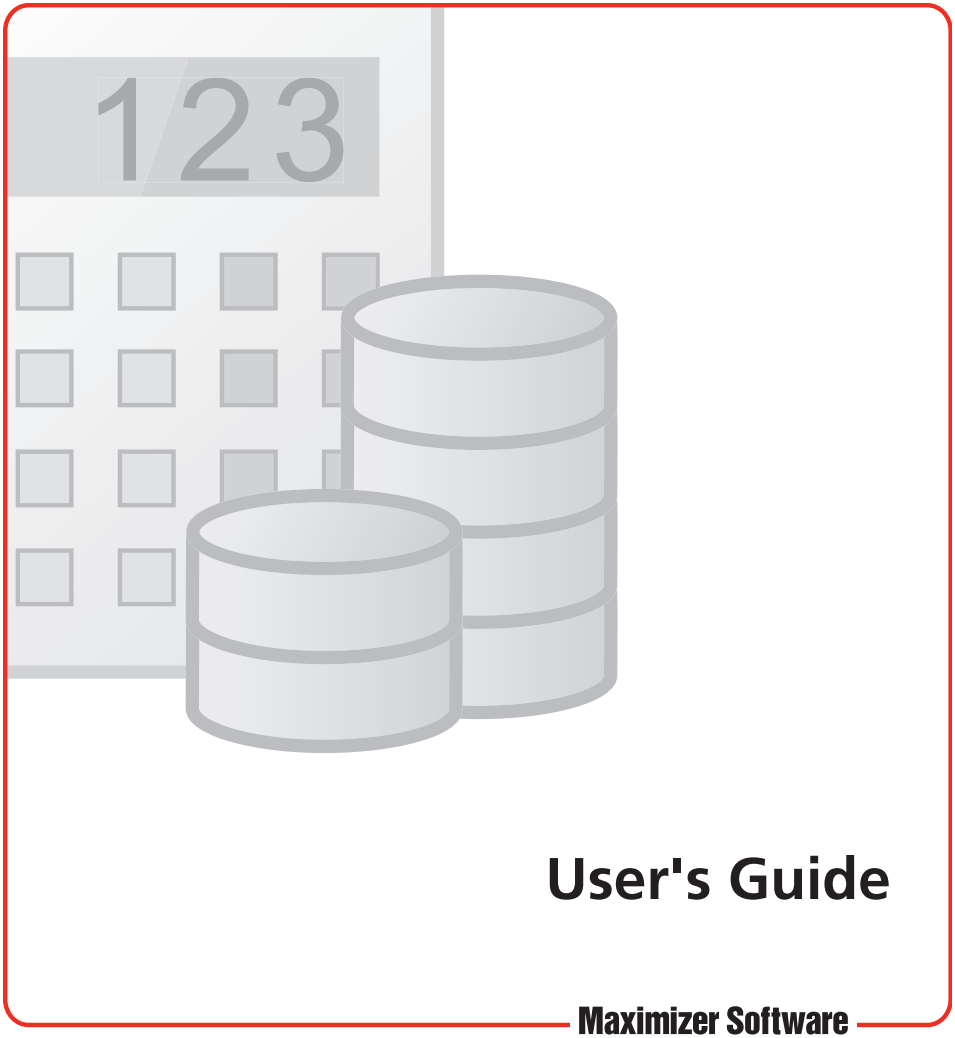
Maximizer™ CRM 11

Accounting Link *for Sage 50 Accounts*



User's Guide

Maximizer Software
Simply Successful CRM

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Applicability

This document applies to Maximizer CRM 11 Accounting Link.

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CHAPTER 1

Introduction

In this chapter...

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"Maximizer System Requirements" on page 3

You cannot use Accounting Link with MaxExchange Remote Workstations.

Maximizer Accounting Link for Sage 50 Accounts enables you to create quotes, invoices, and purchase orders from within Maximizer, while simultaneously creating them in the Sage 50 Accounts database. Entering Sage 50 Accounts transactions through Maximizer also logs notes for the related Address Book entries.

For a current list of supported Sage 50 Accounts versions, refer to the Maximizer website at www.maximizer.com.

This guide explains how to install, configure, and operate Accounting Link.

Configuration

Accounting Link for Sage 50 Accounts supports both local and remote configurations. The Sage 50 database can be located on any computer in the network, and it can be accessed by multiple Accounting Link users. Accounting Link must be installed on every computer using Accounting Link, and Sage 50 Accounts must be installed on at least one computer on the network. All Accounting Link users must have access to the Sage 50 Accounts COMPANY file and database.

Accounting Link for Sage 50 Accounts is designed so that one Maximizer Address Book connects to one Sage 50 database.

Before using Accounting Link, you must ensure that the following steps have been completed:

- Maximizer is installed.
- The Maximizer Address Book is configured.
- Sage 50 Accounts is installed.
- The Sage 50 Accounts database is set up.
- Accounting Link is installed. See "Installing Accounting Link" on page 6 for details.
- Accounting Link licenses are applied. See "Applying Accounting Link Licenses" on page 8 for details.
- Accounting Link users have Accounting Link enabled in their Maximizer user properties. See "Enabling Accounting Module Access" on page 10 for details.
- Accounting Link users have been added to the Accounting security group or have Accounting access rights enabled in their Maximizer user properties. See "Adding Users to the Accounting Security Group" on page 11 and "Granting Accounting Permissions" on page 12 for details.

- Accounting Link is configured in Maximizer. See “Configuring Accounting Link for Sage 50 Accounts” on page 15 for details.
- Sage Data Objects are registered. See “Registering Sage Data Objects” on page 17 for details.

Multi-User Environment

If you work in a multi-user environment, you must also ensure the following:

- The Sage 50 Accounts COMPANY file is stored in a shared folder that is accessible to all computers where Accounting Link is installed.
- The Sage 50 Accounts database is accessible to all Accounting LInk users, and the database directory is shared.
- The Sage 50 Accounts database is set up using a UNC file path. See “Creating Company Entries with UNC File Paths” on page 14 for details.

Maximizer System Requirements

The hardware and software requirements for Accounting Link installation are listed in the following table. Please refer to the Maximizer website at www.maximizer.com for updated information.

These are the minimum system requirements for Maximizer, and your operating system may have higher requirements for some components, such as processor speed and RAM.

Maximizer Version	Maximizer CRM 11 (Workstation or Server)
Minimum Processor Speed	800 MHz (minimum) 1.6 GHz (recommended)
Available RAM	512 MB (minimum) 1 GB (recommended)
Operating System	Microsoft Windows Vista, XP, or 2003 Server (updated to their latest service packs)

CHAPTER 2

Installing Accounting Link

In this chapter...

"Installing Accounting Link" on page 6
"Applying Accounting Link Licenses" on page 8

Installing Accounting Link

Maximizer must be installed before you can install Accounting Link. Install Accounting Link software on all computers that will connect to Sage 50 Accounts through Maximizer.

➤ To install Maximizer Accounting Link for Sage 50 Accounts

1. Insert the Maximizer Accounting Link for Sage 50 Accounts disc.

   The installation wizard runs automatically.

   If the setup doesn't start automatically, you can start it manually by running autorun.exe from the disc.

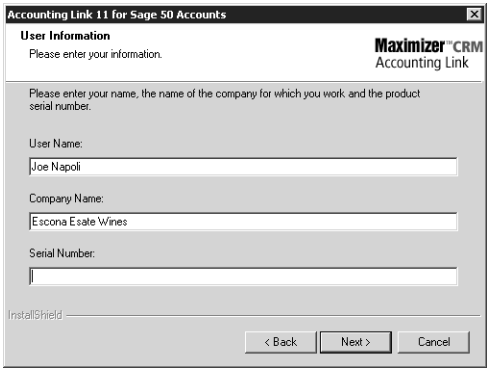
2. Select **Install Accounting Link for Sage 50 Accounts**.

   The InstallShield Wizard starts.

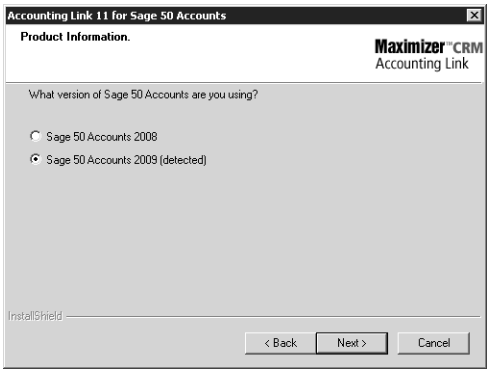
3. Click **Next**.

4. Read the License Agreement, and click **Yes**.

5. Enter your **Name**, **Company**, and **Product Serial Number**. Then, click **Next**.



6 Select the version of Sage 50 Accounts that you want Accounting Link to connect to.



7 Click **Next** to begin the installation.

8 Click **Finish**.

Maximizer Accounting Link for Sage 50 Accounts is now installed.

Applying Accounting Link Licenses

After you have installed Accounting Link, install and apply your Accounting Link Product License Number (PLN), as described in your Maximizer Administrator documentation and online help.

Note that Accounting Link includes a license for one user in addition to the MASTER user.

CHAPTER 3

Providing Accounting Rights to Maximizer Users

In this chapter...

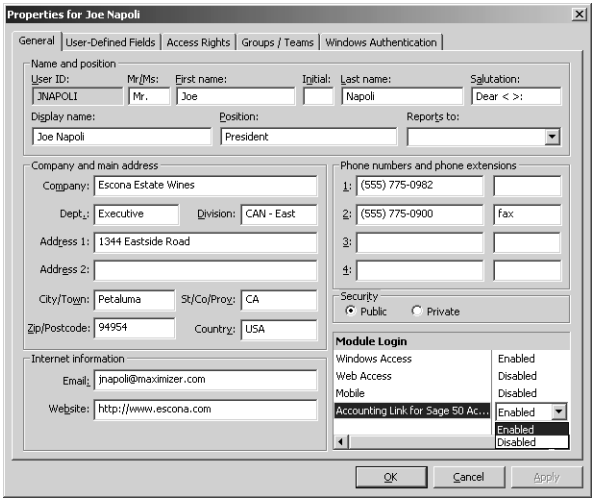
"Enabling Accounting Module Access" on page 10
"Adding Users to the Accounting Security Group" on page 11
"Granting Accounting Permissions" on page 12

Enabling Accounting Module Access

After installing Accounting Link licenses, you can set user access in the Module Login list in user properties. Users must have Accounting module access enabled before they can use Accounting Link in Maximizer.

➤ To enable accounting module access for a user

1. Log in to the Address Book in Administrator.
2. Select **File > Manage Users**.
3. Select the user to grant accounting privileges, and click **Properties**.
4. In the **Module Login** section of the **General** tab, set the Accounting module to **Enabled**.



5. Click **OK**.

Repeat this procedure for all users who will be using Accounting Link.

Adding Users to the Accounting Security Group

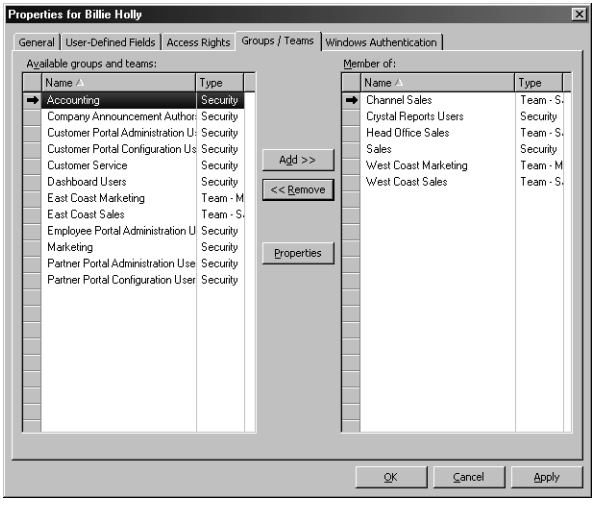
For more information about user and group security, refer to your Maximizer Administrator documentation.

The Accounting security group enables users to restrict accounting transaction notes to members of this group. If an Accounting Link user is not a member of the Accounting security group, notes for any accounting transactions created by that user are Public. However, notes for transactions created by members of the Accounting group are restricted to members of that group.

You can add multiple users to the security group by selecting File > Security Groups and Teams, selecting the Accounting security group and clicking Properties, clicking the Members tab, and then adding users to the group.

➤ To add a user to the Accounting security group

1. Log in to the Address Book in Administrator.
2. Select **File > Manage Users**.
3. Select the user to grant accounting privileges, and click **Properties**.
4. Click the **Groups/Teams** tab.
5. Select the **Accounting** security group from the **Available groups and teams** list, and click **Add**.



The Accounting security group now appears in the Member of list.

6. Click **OK**.

Repeat this procedure for all users who will be using Accounting Link.

Granting Accounting Permissions

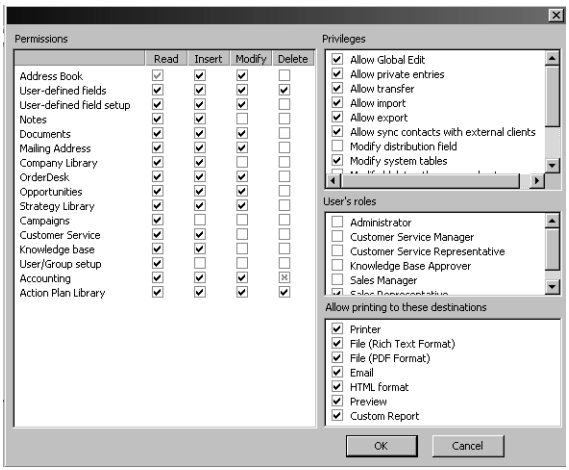
Accounting permissions control whether users can read, insert, or modify accounting transactions.

For more information about user and group security, refer to your Maximizer Administrator documentation.

➤ To grant accounting permissions to a user

1. Log into the Address Book in Administrator.
2. Select **File > Manage Users**.
3. Select the user to grant accounting privileges, and click **Properties**.
4. Click the **Access Rights** tab.
5. Click the **Modify User Access Settings** button.
6. In the **Permissions** group, select any of the Accounting rights, as appropriate for the user, and click **OK**.
7. Click **OK** to close the user properties dialog box.

The Delete permission for Accounting is disabled because Accounting Link cannot delete transactions from the accounting database.



Repeat this procedure for all users who will be using Accounting Link.

CHAPTER 4

Configuring Accounting Link

In this chapter...

"Creating Company Entries with UNC File Paths" on page 14
"Configuring Accounting Link for Sage 50 Accounts" on page 15
"Registering Sage Data Objects" on page 17

Creating Company Entries with UNC File Paths

If you are using Accounting Link in a multi-user environment, you must ensure that the Sage 50 Accounts database is set up using the UNC file path. You can create a new company list entry in Sage 50 Accounts pointing to any existing Sage 50 database.

➤ To create a new company entry in Sage 50 Accounts

1. Start Sage 50 Accounts.
2. When the **Select Company** dialog box opens, click **Add Company**.
3. Enter the UNC file path to the existing Sage 50 Accounts COMPANY file.
4. Click **OK**.

When you configure Accounting Link in Maximizer, you must select this entry in the Company Selection dialog box. See "Configuring Accounting Link for Sage 50 Accounts" on page 15 for details.

Configuring Accounting Link for Sage 50 Accounts

After installing Accounting Link, the Sage 50 Accounts Integration Setup dialog box opens the next time you start Maximizer. You must specify the path to the Sage 50 Accounts COMPANY file and the login credentials and location of the database. You can also access the Accounting Link configuration at any other time from the Maximizer Preferences.

➤ To configure Accounting Link

1. Open Maximizer.
2. On the **Setup** tab, select **Preferences**, and click **Accounting Setup**.

   The Sage 50 Accounts Integration Setup dialog box opens.

   If you are running Maximizer for the first time after installing Accounting Link, the Sage 50 Accounts Integration Setup dialog box opens when you first start Maximizer.
3. Select the **Enable Sage 50 Accounts integration** checkbox.
4. Click the ellipsis button next to the **Path** field, browse to and select the Sage 50 COMPANY file, and click **Open**.

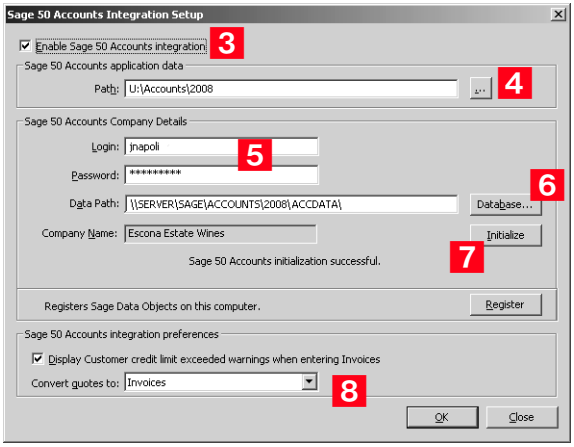
   The Sage 50 COMPANY file must be stored in a folder that is accessible to all Accounting Link users.
5. In the **Login** and **Password** boxes, specify your login credentials for the Sage 50 database.
6. Click **Database**, choose the UNC file path to the Sage 50 database, and click **OK**.

   The Data Path field displays the path to the database.
7. Click **Initialize** to connect to the database.

   The Company Name field displays the Sage 50 company for the selected database.

In Sage 50 Accounts, you can find the "Convert quotes to" setting in the General tab of the Invoice/Order Defaults dialog box.

8 In the **Convert quotes to** drop-down list, select the same option that is specified in your Sage 50 Accounts settings.



9 Click **OK**.

Registering Sage Data Objects

Accounting Link installs and uses Sage Data Objects (SDO) to read the Sage 50 Accounts database. To use Accounting Link, all users must have the SDO registered on their computers. To register SDO, you must first obtain a serial number and an activation key from Sage Software.

If Accounting Link is installed on a computer where Sage 50 Accounts is installed, you can register SDO from the Sage 50 Accounts program. If Accounting Link is running on a computer where Sage 50 Accounts is not installed, you must register SDO from within Maximizer.

➤ To register SDO from Maximizer

1. On the **Setup** tab, select **Preferences**, and click **Accounting Setup**. Then, in the Sage 50 Accounts Integration Setup dialog box, click **Register**.

   – or –

   If SDO is expired on the computer, click **OK** when you are prompted to register SDO. You should be prompted to register SDO when you start Maximizer.

   The Register Sage Data Objects dialog box opens. If you are running Accounting Link on a computer where SDO is expired, you are taken directly to this dialog box after you are prompted to register.

2. Enter the **Serial number** and the **Activation key**.

3. Click **Register**.

   A message should appear indicating that SDO is registered.

CHAPTER 5

Using Accounting Link

In this chapter...

"Connecting to Sage 50 Accounts with Maximizer" on page 20

"Linking Address Book Entries" on page 21

"Creating Invoices, Quotes, and Purchase Orders" on page 25

"Viewing Invoices, Quotes, and Purchase Orders" on page 30

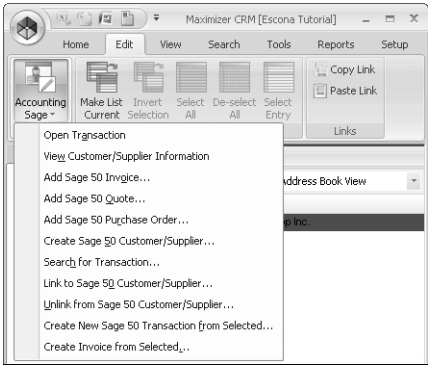
"Viewing Accounting Details about a Customer or Supplier" on page 33

Connecting to Sage 50 Accounts with Maximizer

It's important that Accounting Link and Maximizer are configured correctly before proceeding. Otherwise, the procedures outlined in this chapter will not work properly.

When Accounting Link is successfully installed and configured, you can access Accounting Link transactions and commands from the Address Book window in the following ways:

- View transactions for the selected Address Book entry in the Accounting following window.
- Access accounting commands from the Accounting icon on the Edit and View tabs or from the right-click menu in the Accounting following window.



Linking Address Book Entries

If you re-link a Company file to a different Address Book, all of your Address Book entries must also be re-linked.

Before you can create any invoices, quotes, or purchase orders in Maximizer, you must create a link between each Maximizer Address Book entry and Sage 50 Accounts customer or supplier.

- If the customer or supplier record does not exist in the Sage 50 database, you can create the Accounting Link record from Maximizer using an existing Maximizer Address Book entry.
- If the customer or supplier record does exist in the Sage 50 database, Maximizer creates a connection between the records.

After you have linked an Address Book entry, you can create and view Sage 50 invoices, quotes, and purchase orders from within Maximizer.

➤ To link an Address Book entry to Sage 50 Accounts

1. Open your Maximizer **Address Book**.
2. Select the **Company** or **Individual** to link with Sage 50 Accounts.
3. In Maximizer, select the **Accounting** following window.
4. On the **Edit** tab, select **Accounting > Link to Sage 50 Customer/Supplier**.

   Alternatively, you can choose the command by right-clicking in the Accounting following window.

You can expand your search by entering only the first few letters of the Company or Individual name in the Name field.

5. Click **Search** to display a list of matching customers and/or suppliers.

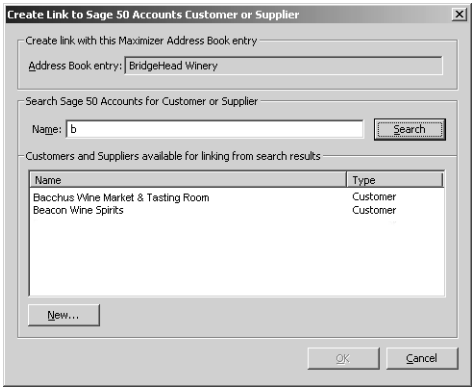
6 If a matching entry appears in the list, select the entry and click **OK** to link the Address Book entry with the customer/supplier.

The records are linked, and you can create purchase orders (suppliers) or invoices and quotes (customers) for that Company or Individual. You may skip the remainder of this procedure.

– or –

The OK button is disabled until you select a Sage 50 Accounts record from the list of search results.

If a matching entry does not appear in the list, click **New**.



The Add Accounting Customer/Supplier dialog box opens. Maximizer automatically fills in any existing contact information.

7 Select the **Customer** option to create the Address Book entry as a customer in Sage 50 Accounts. (You can create invoices and quotes for customers.)

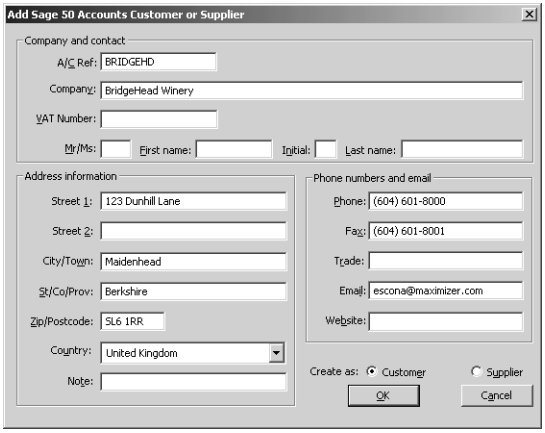
– or –

Select the **Supplier** option to create the Address Book entry as a supplier in Sage 50 Accounts. (You can create purchase orders for suppliers.)

If you know the entry does not exist in your Company database, you can select Create Sage 50 Customer/ Supplier from the Accounting icon on the Edit tab in Maximizer while the Address Book entry is selected.

8 Enter an A/C Ref and VAT Number such as you would in Sage 50 and click **OK**. These identifiers are controlled manually in this dialog box.

Maximizer and Sage 50 Accounts now share a connection between these records.



Creating Address Book Entries from Customers and Suppliers

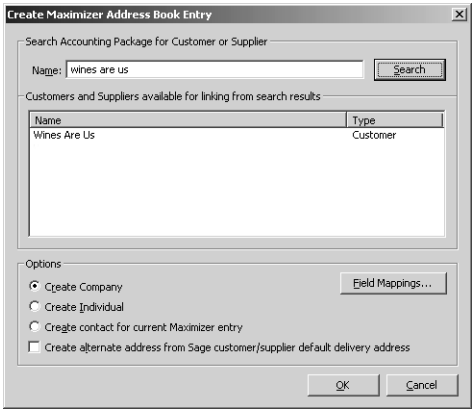
You can create new Maximizer Address Book entries from existing Sage 50 Accounts customers and suppliers. New entries are automatically linked to the customers and suppliers.

➤ To create an Address Book entry from a customer or supplier

1. Select the **Accounting** following window.
2. On the **Edit** tab, select **Accounting > Create New Address Book Entry from Sage 50 Customer/Supplier**.

   The Create Maximizer Address Book Entry dialog box opens.
3. Enter the name of the customer or supplier, or leave the **Name** field empty to view all customers and suppliers. Click **Search**.

   All matching customers and suppliers are retrieved.
4. Select the customer/supplier that you want to create the entry for.
5. In the **Options** area, choose the type of Address Book entry that you want to create. You can also click **Field Mappings** to choose the Maximizer fields that some of the Sage 50 Accounts fields are mapped to.
6. Click **OK**.



The new Address Book entry is created with the data from the Sage 50 Accounts customer or supplier. You can specify additional details in the Address Book entry.

Creating Invoices, Quotes, and Purchase Orders

You can create invoices, quotes, and purchase orders in Maximizer, and they will automatically be created in Sage 50 Accounts as well. Before you can create any of these transactions, the Company or Individual must be linked to either a customer or supplier record in Sage 50 Accounts:

- To create an invoice or quote, the Address Book entry must be linked to a customer record.
- To create a purchase order, the Address Book entry must be linked to a supplier record.

You can also create new transactions based on existing transactions, and create invoices based on quotes. Maximizer copies the information from the original transaction into a new transaction and enables you to modify the new transaction before saving it. Details on these procedures are provided further along in this section.

Each time an invoice, a quote, or a purchase order is created or modified, a note is logged in Maximizer.

➤ To create an invoice, quote, or purchase order

1. In Maximizer, open the **Address Book** and select the Company or Individual to create a transaction for.

   Ensure that the Address Book entry is linked to a Sage 50 record. If it isn't, refer to "Linking Address Book Entries" on page 21 before proceeding with this procedure.

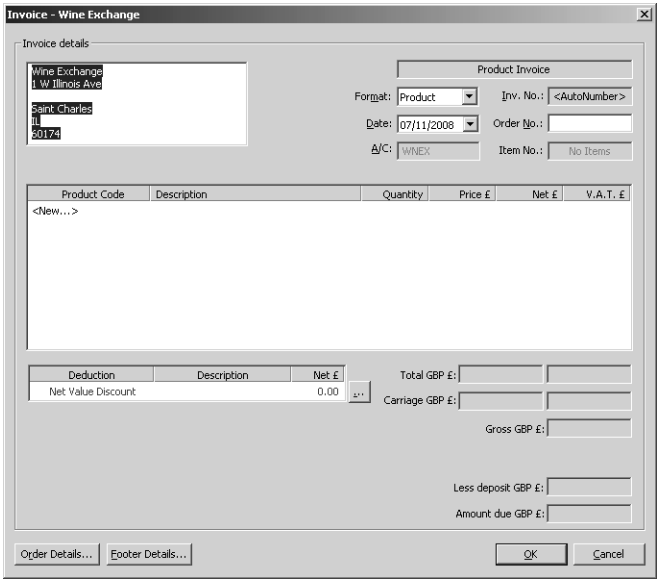
These menu items are also available from the Accounting icon in the Edit tab.

2. In the Accounting following window, right-click and select **Add > Invoice/Quote/Purchase Order**.

   The Invoice, Quote, or Purchase Order dialog box opens. Maximizer automatically fills in the customer or supplier name and address, the date, and any tax information.

   If you are creating an invoice or quote, you have the option of creating a product or service transaction. In the **Format** or **Type** drop-down list, select the type of invoice or quote.

3 In the **Product Code** or **Details** column, click on **New**.



? For detailed information about any of these fields, select the dialog box, and press F1.

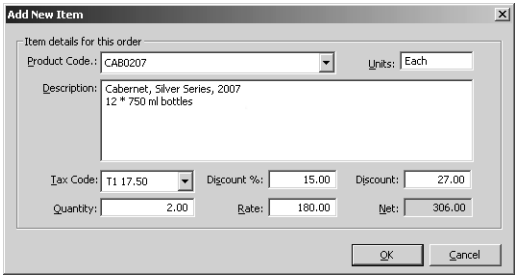
4 In the Add New Item dialog box, select the **Product Code** for the item from the drop-down list, or enter a description of the service.

5 Add or change any of the other information in the Add New Item dialog box.

You can change the tax code, the quantity, and apply a discount to the item:

- To apply a percentage discount, specify the percentage in the **Discount %** box.
- To apply a fixed discount, specify the amount in the **Discount** box.

When you are finished, click **OK**.



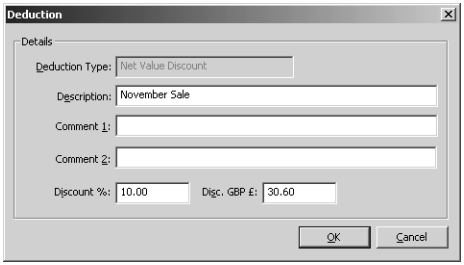
6 Repeat the last three steps until all required items have been added to the transaction.

You can specify deductions for only quotes and invoices.

7 To apply a discount to the entire quote or invoice, click the ellipsis button next to **Deduction**. Specify the details of the discount, and click **OK**.

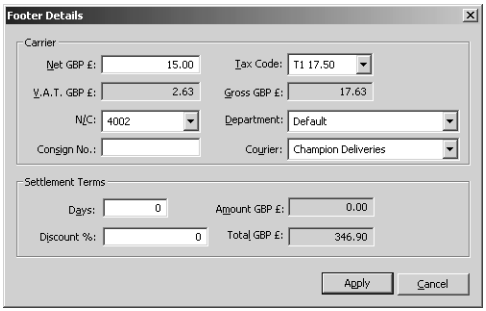
You can specify a percentage or fixed discount:

- To specify a percentage discount, enter the percentage in the **Discount %** box.
- To specify a fixed discount, enter the amount in the **Disc**. box.



8 Specify any remaining details for the transaction.

- Click **Order Details** to specify a delivery address and notes to accompany the transaction.
- Click **Footer Details** to specify any carriage costs and settlement terms for the transaction.



9 Click **OK**.

The transaction has now been created in both Maximizer and Sage 50 Accounts, and Maximizer creates a history note in the Notes window of the Address Book entry. You can also view the invoice, quote, or purchase order from the Accounting tab of the Maximizer Address Book following window, as described on page 30.

Creating a New Transaction Based on an Existing One

Accounting Link enables you to create a new transaction (invoice, quote, or purchase order) based on an existing transaction, so the newly created transaction automatically contains the information from the original transaction, which you can then modify as required. This method saves you time because it reduces the amount of information you need to enter for similar transactions.

➤ To create a new transaction based on an existing transaction

1. In Maximizer, open the **Address Book** and select the Company or Individual for whom to create an invoice, quote, or purchase order.
2. Open the **Accounting** following window, and select the invoice, quote, or purchase order to use as the basis for the new transaction.
3. On the **Edit** tab, select **Accounting > Create New Sage 50 Transaction from Selected**.

   – or –

   Right-click in the **Accounting** following window, and select **Add** > **Create New Sage 50 Transaction from Selected**.

   The Invoice, Quote, or Purchase Order dialog box opens, depending on the original transaction. Maximizer automatically fills in all the information from the original transaction.
4. Change any of the information in the transaction, or add more items to the list, as required.

   To remove an item, right-click on it and select **Delete** from the shortcut menu.
5. Click **OK**.

   The transaction has now been created in both Maximizer and Sage 50 Accounts, and Maximizer creates a history note in the Notes window of the Address Book entry. You can also view the invoice, quote, or purchase order from the Accounting following window, as described on page 30.

Creating an Invoice from a Quote

Accounting Link enables you to create a new invoice based on an existing quote, so the newly created invoice automatically contains the information from the original quote, which you can then modify as required. Making changes to the invoice does not apply those changes to the quote.

➤ To create a new invoice based on an existing quote

1. In Maximizer, open the **Address Book** and select the Company or Individual for whom to create an invoice.
2. Open the **Accounting** following window, and select the quote to use as the basis for the new transaction.
3. On the **Edit** tab, select **Accounting > Create Invoice from Selected**.

   – or –

   Right-click in the **Accounting** following window, and select **Add** > **Create Invoice from Selected**.

   The Invoice dialog box opens. Maximizer automatically fills in all the information from the original quote.
4. Change any of the information in the transaction, or add more items to the list, as required.

   To remove an item, right-click on it and select **Delete** from the shortcut menu.
5. Click **OK**.

   The invoice has now been created in both Maximizer and Sage 50 Accounts, and Maximizer creates a history note in the Notes window of the Address Book entry. You can also view the invoice from the Accounting following window, as described in the following section.

Viewing Invoices, Quotes, and Purchase Orders

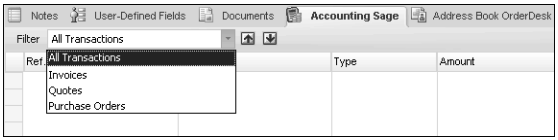
You can view existing invoices, quotes, and/or purchase orders for a customer or supplier from within Maximizer, even if the transaction was not created in Maximizer. When you link a Maximizer Address Book entry to a customer or supplier, existing invoices, quotes, or purchase orders display in Maximizer automatically.

You can view existing transactions in the Accounting tab of the Maximizer Address Book following window.

➤ To view an invoice, quote, or purchase order

1. In Maximizer, open the Address Book and select the Company or Individual for whom to view a transaction.
2. Select the **Accounting** following window.
3. Open the **Filter** drop-down list, and select **Invoices**, **Quotes**, **Purchase Orders**, or **All Transactions**

   The transactions of that type for the selected customer or supplier appear. You can double-click any item to view the details.



Searching for Invoices, Quotes, and Purchase Orders

You can search your accounting application for invoices, quotes, and purchase orders and then view the transactions in Maximizer. If the transaction's customer or supplier is not linked to an Address Book entry, you can also create a new Address Book entry at the same time.

You can search for all types of transactions by transaction number or reference number.

➤ To search for invoices, quotes, and purchase orders

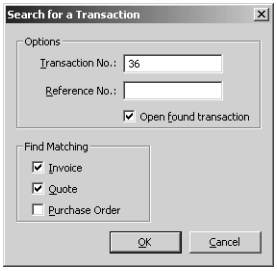
1. Open the **Accounting** following window.
2. On the **Edit** tab, select **Accounting** > **Search for Transaction**.

   – or –

   Right-click in the **Accounting** following window, and select **Add** > **Search for Transaction**.

   The Search for a Transaction dialog box opens.
3. In the **Options** area, specify the search criteria for the transaction.

   The transaction number is the unique identifier for the transaction while the reference number is an optional user-defined number.
4. To open the transaction automatically after the search, select the **Open found transaction** checkbox. Otherwise, the search returns all transactions for the Address Book entry.
5. In the **Find matching** area, specify the types of transactions that you want to search for.



6. Click **OK**.

   If the customer or supplier for the matching transaction is not linked to an Address Book entry, you are prompted to create a

new Address Book entry from the customer or supplier. See "Creating Address Book Entries from Customers and Suppliers" on page 24 for details.

7 If multiple transactions are found, select the transaction from the list of matching transactions.

The Address Book entry that is linked to the transaction is selected, and the transaction is listed in the Accounting following window.

Viewing Accounting Details about a Customer or Supplier

Maximizer enables you to view the following accounting details about a customer or supplier from within Maximizer:

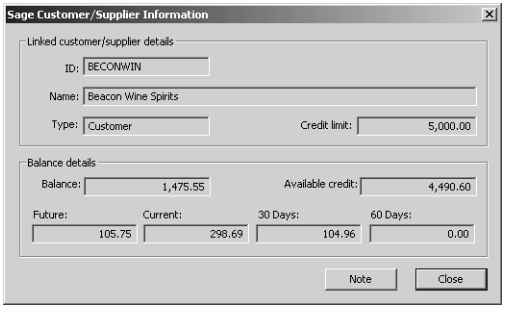
- customer balance
- aged analysis (30-, 60-, or 90-day balances)
- credit limit
- remaining available credit

➤ To view Sage 50 accounting details

1. In Maximizer, open the Address Book and select the Company or Individual for whom you want to view accounting details.
2. Select the **Accounting** following window.
3. On the **Edit** tab, select **Accounting > View Customer/ Supplier Information**.

   The Customer/Supplier Information dialog box opens. It contains the accounting details for the selected Company or Individual.
4. View the accounting details in the dialog box.
5. Click **Close**.

ⓘ This menu item is also available from the shortcut menu in the Accounting following window.



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