

ACT! by Sage

Premium 2009 (11.0)

Installation Guide

ACT! by Sage Premium 2009 (11.0) *Installation Guide*

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End User License Agreement

ACT! Premium 2009 (11.0) is protected by an End User License Agreement. To view the agreement, go to the Help menu in the product, click About ACT!, and then click the View the End User License Agreement link.

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Welcome to ACT! Premium 2009. This software is designed for business teams and workgroups.

Whether you are installing ACT! for the first time (New User) or upgrading from an earlier version (Upgrade User), this guide provides information you need to successfully install the software. See the following sections:

- Installing ACT! for the first time
- Upgrading ACT! – To prepare your database for an upgrade and to install ACT!.
- Installing Other Applications – To learn about software you can use with ACT!, such as:
 - Microsoft® SQL Server® 2005 Edition
 - ACT! Synchronization Services
 - ACT! Link for Palm OS®
 - ACT! Link for Pocket PC

Preparing to Install

To ensure a successful installation, all users should complete the following tasks before installing ACT!.

✓	Be sure to:
	Sign on as a Windows® Administrator. See Microsoft's Help for more information.
	Close all open applications.
	To install to a destination other than the default location (C:\Program Files\ACT\ACT for Windows), verify that folder-sharing rights are enabled and the directories exist. Note: You cannot install the software to a network drive or run it from the CD.

Note: ACT! supports 32-bit (x86) and some 64-bit operating systems. For more information, see *System Requirements at www.act.com/2009systemreq*.

Installing ACT! for the First Time

This section explains how to install, register, and activate ACT! Premium 2009.

To install ACT!

Note: To install ACT! on any Windows Vista® operating system, you must be a Windows Administrator.

1. If you are installing ACT! Premium (ST Edition) and want to use Microsoft SQL Server Standard Edition, ensure you install SQL Server first, as described on page 13.

2. Insert CD 1 into the CD drive. If you downloaded the software, double-click the **setup.exe** file.

Note: If the install program does not start automatically, do the following: From the Windows Start menu, click Run. Type <drive letter>:SETUP. Click OK. (Substitute the appropriate drive letter for your CD drive.)

3. From the CD browser page, click **Install ACT! Premium**.
4. Click **Next** to advance through the wizard. As message prompts appear, follow the instructions.

During installation, be aware of the following:

- If you do not have Windows Installer 3.1 and Microsoft .NET 2.0 components, the Install Wizard prompts you to install them.
- If you are installing ACT! on a Windows 2003 64-bit edition with a 32-bit edition of .NET 2.0, you are prompted to manually install .NET 2.0 64-bit edition.
- Microsoft automatically installs some components in the default location in the local Program Files directory. You can select a non-default destination for ACT! and SQL Server.

Note: If a message prompts you to update SQL Server 2005 to Service Pack 2, click the Knowledge Base link in the message to get instructions for downloading Service Pack 2 and the utility for installing it. You must install this utility where SQL Server is installed.

Caution: Installing ACT! to a non-default location may cause third-party applications that work with ACT! to stop working. You may need to reinstall them.

5. On the **ACT! Setup Complete** page, read the information. Select one or more of the following options:
 - **Launch ACT!**
 - **Open the Quick Start for New Users**
 - **View README file**
6. Click **Finish**. If you selected to launch (start) the software, when ACT! opens, the ACT! Update message appears. Click **Yes** to check for updates since the version was released; click **No** to continue with registration.

Registering and Activating ACT!

Registration is required to use the product and ensures you of timely program updates, upgrade offers, and customer support options. When you first launch ACT!, the Registration and Activation Wizard appears, however, you can register and activate the product at another time (from the Help menu, click Register ACT!).

***Note:** If you do not register and activate ACT! within 30 days, it will stop working.*

After you register, activate ACT! on each computer where it is installed. Your serial number is printed on the back of the CD sleeve or provided with your downloaded product.

***Note:** If using Vista, you must perform this function as an Administrator. Close ACT!, right-click the ACT! icon on the desktop or in the Program Files list, and then click Run as administrator.*

Next Steps

You are done! You can:

- Use the Setup Assistant to help you set up your database, e-mail system, and other preferences.
- Install other applications to use with ACT!, as described on page 13.
- Start working with ACT!. For more information about using ACT!, see the *Quick Start for New Users* guide.

Upgrading ACT!

This section explains how to:

- Prepare your database for upgrading an ACT! database and for converting an ACT! 3.x–6.x database.
- Install, register, and activate ACT! Premium 2009.
- Upgrade an ACT! or ACT! Premium database.
- Convert an ACT! 3.x–6.x database.

Preparing to Upgrade or Convert an ACT! Database

This section explains how to prepare your database for upgrading and for converting an ACT! 3.x–6.x database.

What You Should Know

- Other than ACT! 3.x–6.x, you cannot have any other version of ACT! (including ACT! for Financial Professionals and ACT! for Real Estate) on the same computer as ACT! Premium 2009.
- When you install ACT! Premium 2009, the install process uninstalls any ACT! 2005–2008 software.

Caution: *Upgrading overwrites earlier versions of the database. We strongly recommend that you back up your database before upgrading. Only ACT! Administrators and Managers can back up a database.*

- If the installer detects an ACT! 2005–2008 e-mail database, it will ask if you want to save a copy of the database before upgrading it.

Caution: *Once you upgrade the e-mail database, it will not work with ACT! 2005–2008. Therefore, you should save a copy of the e-mail database, in case you choose to move back to an earlier version. The copy stays in the original location. For instructions on saving a copy of the e-mail database, see "About transferring ACT! E-mail databases" in your current version of Help.*

Preparing to Upgrade an ACT! Premium 2005 (7.x)–2008 (10.x) Database

If you are upgrading an ACT! 2005–2008 database, ensure the following before you install ACT! Premium 2009:

- If you synchronize databases, verify that they all use the same version of ACT!.
- If you are installing ACT! Premium 2009 (ST Edition), install Microsoft SQL Server first. Follow the steps in "To Install Microsoft SQL Server Standard Edition" on page 13.

Preparing to Convert an ACT! 3.x–6.x Database

If you are upgrading an ACT! 3.x–6.x database, you must prepare the database for conversion before installing ACT! Premium 2009. Note the following considerations, and then complete the tasks as described in "ACT! 3.x–6.x Conversion Checklist" on page 7.

- Converting a database increases the database size. If you are using Microsoft SQL Server 2005 Express Edition, and the database is over 4 GB, it will not convert.
- Fields set to "Not Allow Editing" in an ACT! 6.x database convert to Read Only fields in an ACT! Premium 2009 database.
- ACT! 3.x–6.x databases store date and time fields as literal values. For example, an appointment scheduled at 1:30 P.M. in Arizona displays to all users as 1:30 P.M., regardless of a user's time zone. ACT! Premium 2009 databases store date and time fields as Greenwich Mean Time (GMT), so the data displays according to a user's time zone.
- Once you convert an ACT! 3.x–6.x database to an ACT! Premium 2009 database, you cannot open the converted database in earlier versions of ACT!.

ACT! 3.x-6.x Conversion Checklist

✓	Task
	If you use passwords, record the user names and passwords. You may need to re-enter them after conversion.
	If you have multiple databases, set all the databases to a "home" time zone before you upgrade. You can reset the time zone for individual databases after conversion.
	If you synchronize remote databases, synchronize all data into one database before converting. After you install ACT! Premium 2009, you will convert that database, and then create new remote databases to distribute to remote locations and users. Help describes how to create and distribute new remote databases.
	Delete obsolete data in the existing database. Then, compress and re-index it. See "About database maintenance" in the ACT! 3.x-6.x Help.
	Run the ACTDiag tool. The Integrity Checker and all items should be checked green. See "Running the ACT! Data Diagnostic tool in ACT! 3.x-6.x" in Help.
	Open the database and re-index it again.
	Back up the database.
	If you are installing ACT! Premium 2009 (ST Edition), install Microsoft SQL Server. Follow the steps in "To Install Microsoft SQL Server Standard Edition" on page 13.

Next Step

Install, register, and activate the software as described on page 8.

Installing, Registering, and Activating ACT!

Note: To install ACT! on any Windows Vista[®] operating system, you must be a Windows Administrator.

To install, register, and activate ACT!

1. If you are installing ACT! Premium (ST Edition) and want to use Microsoft SQL Server Standard Edition, ensure you install SQL Server first, as described on page 13.
2. Insert CD 1 into the CD drive. If you downloaded the software, double-click the **setup.exe** file.

Note: If the install program does not start automatically, do the following: From the Windows Start menu, click Run. Type <drive letter>:SETUP. Click OK. (Substitute the appropriate drive letter for your CD drive.)

3. From the CD browser page, click **Install ACT! Premium**.
4. Click **Next** to advance through the wizard. As message prompts appear, follow the instructions.

During install, be aware of the following:

- If you do not have Windows Installer 3.1 and Microsoft .NET 2.0 components, the Install Wizard prompts you to install them.
- You are installing ACT! on a Windows 2003 64-bit edition with a 32-bit edition of .NET 2.0, you are prompted to manually install .NET 2.0 64-bit edition.
- Microsoft automatically installs some components in the default location in the local Program Files directory. You can select a non-default destination location for ACT! and SQL Server.

Note: If a message prompts you to update SQL Server 2005 to Service Pack 2, click the Knowledge Base link in the message to get instructions for downloading Service Pack 2 and the utility for installing it. You must install this utility where SQL Server is installed.

Caution: If you install ACT! to a non-default location, any third-party applications you use that work with ACT! may stop working. You may need to reinstall them.

5. On the **ACT! Setup Complete** page, read the information. Select one or more of the following options:
 - **Launch ACT!**
 - **View README file**
 - **View Quick Start for New Users**

6. Click **Finish**. If you selected to launch (start) the software, when ACT! opens, the ACT! Update message appears. Click **Yes** to check for updates since the version was released; click **No** to continue with registration.

Note: If you do not register and activate ACT! within 30 days, it will stop working.

After you register, activate the software on each computer where it is installed. Your serial number is printed on the back of the CD sleeve or provided with your downloaded product.

Next Step

Upgrade Users from ACT! or ACT! Premium 2005–2008 or ACT! 2009

Upgrade the database as described on page 9.

Upgrade Users from ACT! 3.x–6.x Convert the database, as described on page 10.

Upgrading an ACT! Database

To complete the installation, you must upgrade your ACT! or ACT! Premium 2005–2008 database or an ACT! 2009 database.

To upgrade the database

1. Open ACT!.
2. From the toolbar, click **Open Database**.
3. Depending on the database you upgrade, in the **Files of type** list, select **ACT! Database (*.PAD)** or **ACT! Database (*.ADF)**.
4. Browse to the location of the database file. Double-click it.
5. Follow the instructions on your screen to complete the upgrade.

Note: If you have not already backed up your database, we strongly recommend you do so when prompted. Only ACT! Administrators and Managers can back up a database.

Next Steps

You are done! You can:

- Use the Setup Assistant to help you set up your e-mail system and other preferences.
- Install other applications to use with ACT! as described on page 13.

Converting an ACT! 3.x–6.x Database

To complete the upgrade, convert your ACT! 3.x–6.x database. Conversion maps data from fields in a 3.x–6.x database to fields in an ACT! Premium 2009 database. You can use the standard or custom conversion.

Standard conversion Uses a default field mapping. Use Standard conversion if you *have not* added custom address, phone, or secondary contact fields to your ACT! 3.x–6.x database.

Custom conversion Lets you change field mapping before converting the database. Use Custom conversion if you *have* added custom fields for addresses, phone numbers, or secondary contacts to your ACT! 3.x–6.x database.

***Caution:** Before converting your database, we recommend you read "Database conversion requirements and considerations" in the ACT! Premium 2009 Help. (You do not need to open or convert a database to access Help.)*

This section explains how to perform a standard conversion. For instructions to perform a custom conversion, see Help.

***Note:** During conversion, a secondary contact record is created if any fields on the Secondary Contacts tab contain data. (For example, if a Contact field on the Secondary Contacts tab has data, but no other fields on the tab do, the conversion produces a secondary contact with only the contact name filled in.)*

To perform a Standard conversion of an ACT! 3.x–6.x database

1. Open ACT! Premium 2009. Click **Open Database** on the toolbar.
2. In the **Open** dialog box, in the **Files of type** field, select **ACT! 3–6 Database (*.DBF)** from the list. Locate the database file.
3. Select the database. Click **Open**.
4. If a verification message appears, click **OK**.
5. In the **Database Conversion Wizard**, follow the instructions on the wizard pages and any message prompts. Click **Next** to advance through the wizard.
6. Select the following options as you advance through the wizard:
 - a. On the **Conversion Type** page, select **Standard Conversion**.
 - b. If your database includes attachments, on the **Convert Attachments** page, select the option to convert them as files or as shortcut links to the original files.

- c. On the **Specify Target Database** page, complete the fields. If more than one user has log-on privileges to the database, select the **Share Target Database** option.
- d. At the message prompt, click **OK** to start the conversion. Conversion may take several minutes.

When database conversion is complete, you can choose to convert supplemental files. Supplemental files include report and e-mail templates, Microsoft Word and ACT! Word Processor templates, and layouts, labels, and envelopes. (The option to convert them selected by default.) For more information, see "Converting an ACT! 3.x-6.x database and supplemental files" in Help.

- e. Click **Finish**. The wizard closes and the ACT! Premium 2009 database opens with all the data from ACT! 3.x-6.x.

Next Steps

You are done! You can:

- Use the Setup Assistant to help you set up your e-mail system and other preferences.
- Install other applications to use with ACT! as described on page 13.

Installing Other Applications

This section describes installing Microsoft SQL Server Standard Edition and ACT! Synchronization Services.

Using Microsoft SQL Server with ACT!

Microsoft SQL Server 2005 software is used to create and manage the ACT! database. This component is required. ACT! Premium is available in two editions:

- ACT! Premium 2009 (11.0) (EX Edition) comes with Microsoft SQL Server Express Edition. With SQL Server Express, you can have up to a maximum of 4 gigabytes (GB) of data for each database.

Note: The 4 GB limit does not include supplemental files, such as layouts and templates, attachments, and e-mail. ACT! E-mail is a separate database with its own 4 GB limitation.

- ACT! Premium 2009 (11.0) (ST Edition) comes with both Microsoft SQL Server Express Edition and Microsoft SQL Server Standard Edition. SQL Server Standard Edition does not limit the size of your database. You can choose which one you use.

We recommend using the following Microsoft Windows operating systems with SQL Server Standard Edition:

- Server[®] 2003 Standard Edition (Service Pack 2)
- Server 2003 Enterprise Edition (Service Pack 2)
- 2003 Small Business Server (Service Pack 2)

If you are installing ACT! Premium (ST Edition) and want to use Microsoft SQL Server Standard Edition, you must install SQL Server first.

Note: Microsoft automatically installs some components in the default location in the local Program Files directory. You can select a non-default destination for ACT! and SQL Server.

To Install Microsoft SQL Server Standard Edition

1. Insert CD 2 in the CD drive.
2. Click **Install Microsoft SQL Server 2005**.
3. Follow the instructions on the Install Wizard pages to choose a regional version, accept the license agreement, choose a destination location, and complete installation. Click **Next** to advance through the wizard.

The wizard installs Microsoft SQL Server 2005 Standard Edition. The installation may take a few minutes.

4. On the **Installation Complete** page, click **Finish**.

Using ACT! Synchronization Services

The ACT! software includes the following applications, which you can install after you install ACT!.

ACT! Synchronization Services includes:

- **ACT! Network Synchronization Service** – Optional service used to synchronize over a network. The service is designed for remote users connected to the main database via a Local Area Network (LAN), Wide Area Network (WAN), or a Virtual Private Network (VPN) when the main database is not open. If you choose to install the ACT! Network Synchronization Service, you can install it on the same computer as ACT! or on another computer.
- **ACT! Internet Synchronization Service** - Optional service used to synchronize over the Internet when the main database is not open. This installation is required only if you plan to use Internet synchronization. This service requires a computer with ASP.NET and the following versions of Microsoft Internet Information Services (IIS):
 - On Windows XP – IIS 5.1
 - On Server 2003 – IIS 6.0
 - On Windows Vista or Windows Server 2008 – IIS 7.0

Note: If using 64-bit Vista, Server 2003, or Server 2008, ACT! will prompt you to set IIS 7.0 to run in 32-bit compatibility mode.

For information about installing IIS or ASP.NET, see Microsoft's online Help.

To install ACT! Network Synchronization Service

1. Insert the ACT! CD 1 into the CD drive. The install program starts automatically.
2. Click **ACT! Synchronization Services**.
3. Click **ACT! Network Synchronization Service**.
4. Follow the instructions on each page, clicking **Next** to advance. Click **Finish** to close.
5. Configure the Network Synchronization Service as described in "Setting up the ACT! Network Synchronization Service" in ACT! Help.

To install ACT! Internet Synchronization Service

1. Insert the ACT! CD 1 into the CD drive of the computer running IIS. The install program starts automatically.
2. Click **ACT! Synchronization Services**.
3. Click **ACT! Internet Synchronization Service**.
4. Follow the instructions on each page. Click **Next** to advance. Click **Finish** to close.
5. Configure the Internet Synchronization Service as described in "Installing and setting up Internet Synchronization Service" in ACT! Help.

Using Software for Handheld Devices

Software for handheld devices includes:

- **ACT! Link for Palm OS** – This application is used to send and receive ACT! data to/from a Palm OS handheld device. For installation instructions, see the *ACT! Quick Start for Handheld Links*.
- **ACT! Link for Pocket PC** – This application is used to send and receive ACT! data to/from a Pocket PC handheld device. For installation instructions, see the *ACT! Quick Start for Handheld Links*.

