



Installing Sage ACT! for New Users

**for Sage ACT! Pro 2011
and Sage ACT! Premium 2011**

sage

Installing Sage ACT! for New Users for Sage ACT! Pro 2011 and Sage ACT! Premium 2011

Copyright © 2010 Sage Software, Inc. All Rights Reserved.

Sage, the Sage logos, ACT!, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities. Microsoft SQL Server, Windows Vista and the Windows logo are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

Released BETA/2010 for Sage ACT! Pro 2011 and Sage ACT! Premium 2011

Version: UA13-BETA1

This material may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or computer-readable form without prior consent in writing from Sage Software, Inc., 1715 North Brown Road Lawrenceville, GA 30043 ATTN: Legal Department.

ALL EXAMPLES WITH NAMES, COMPANY NAMES, OR COMPANIES THAT APPEAR IN THIS MANUAL ARE FICTIONAL AND DO NOT REFER TO OR PORTRAY IN NAME OR SUBSTANCE ANY ACTUAL NAMES, COMPANIES, ENTITIES, OR INSTITUTIONS. ANY RESEMBLANCE TO ANY REAL PERSON, COMPANY, ENTITY, OR INSTITUTION IS PURELY COINCIDENTAL.

Every effort has been made to ensure the accuracy of this material. However, Sage Software, Inc. makes no warranties with respect to this documentation and disclaims any implied warranties of merchantability and fitness for a particular purpose. Sage Software, Inc. shall not be liable for any errors or for incidental or consequential damages in connection with the furnishing, performance, or use of this material or the examples herein. The information in this material is subject to change without notice.

End User License Agreement

This product is protected by an End User License Agreement. To view the agreement, go to the Help menu in the product, click About Sage ACT!, and then click the View End-User License Agreement link.

Printed in the United States of America.

Published by

Sage Software, Inc.

8800 N. Gainey Center Drive, Suite 200

Scottsdale, AZ 85258

(480) 368-3700

10 9 8 7 6 5 4 3 2 1

Contents

Introduction	1
Installing, Registering, and Activating Sage ACT! 2011..	3
Other Information	9
Installing Other Applications.....	10
Getting Started for New Users.....	13



Introduction

Welcome to Sage ACT! 2011. Sage ACT! is the #1 selling Contact and Customer Manager in the world.

This guide provides installation instructions for new users of:

Sage ACT! Pro 2011 – For professionals who work alone or in small workgroups of up to 10* users.

Sage ACT! Premium 2011 – For professionals who work in business teams and workgroups. This version includes access via Windows® and the Web. If you are installing access for users via the Web, then you will need this guide and the *Sage ACT! Premium 2011 Web Administrator's Guide* to complete installation and configuration. The Web Administrator's Guide is available on the product's DVD under Product Documentation.

IMPORTANT: If you have a previous ACT!, ACT! Premium, or ACT! Premium for Web version installed, DO NOT USE THIS GUIDE. Instead, see the Upgrading Guides provided on the Installation DVD under Product Documentation. Guides are available for users upgrading from ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) and ACT! 2005 -2012 versions.

NOTE: Adobe® Reader® is required to access and view Product Documentation. Installation instructions for a free copy of Adobe Reader are provided in the "Installing Other Applications" section of this guide.

When features are exclusive to Sage ACT! Premium or Sage ACT! Premium (Web client), they are noted in the guide. In most sections, we refer to all versions as Sage ACT! 2011.

* Some operating systems may limit concurrent connections.

What You Should Know Before Installing

This section contains information you should know before installing Sage ACT! 2011.

Microsoft® SQL Server® 2008 Express R2 and required components – Sage ACT! 2011 automatically installs Microsoft SQL Server 2008 Express R2, which requires .NET Framework 3.5 SP1 and Windows® Installer 4.5 components. These components are installed for you if they are not already on your computer.

NOTE: If you plan to have two or more Sage ACT! users, all connected to the same database, and the database is on a separate server, you do not need to install Microsoft SQL Server Express on every computer. However, be aware that SQL Server Express is needed to create or synchronize a database. If you opt to skip the SQL Server Express install and your organization needs to synchronize or cut remote databases, make sure that SQL Server Express is installed on the computer that will host the database.

Microsoft Outlook®, Word, and Excel® integration – Sage ACT! 2011 integrates with Microsoft Outlook, Word, and Excel. (For compatible versions, see System Requirements at www.act.com/2011systreq). If you plan to use the integration features, ensure Outlook, Word, and Excel are installed and working correctly *before* you install Sage ACT! 2011. To configure and set up integration for Sage ACT! Pro or Sage ACT! Premium users after installation, see Help. To configure and set up integration for Sage ACT! Premium (Web client) users, see the *Sage ACT! Premium 2011 Web Administrator's Guide*.

Installing, Registering, and Activating Sage ACT! 2011

This section explains how to prepare for installation, install, register, and activate the software for first-time (new) users.

IMPORTANT: If you are installing Sage ACT! Premium (Web client) with a multiple-server configuration, you must install Sage ACT! Premium on the database server (even though you will be running the application from the Web server). Installing the software on the database server creates the Microsoft SQL Server instance. You connect to the database from the Web server.

TIP: To install Sage ACT! Premium in a workgroup environment without user interaction, you can install it silently. For more information, contact Sage ACT! Corporate Sales.

Preparing to Install

To ensure a successful installation, complete the following steps before installing Sage ACT! 2011.

Prepare to install

1. Ensure your computer (or all computers if installing the software in a shared environment) meets the minimum recommended system requirements for your purchased product and supported operating systems. Also, verify you meet the concurrent user limits and licenses. See System Requirements at www.act.com/2011systemreq.
2. Ensure all computers are up-to-date with Microsoft critical and recommended updates.
3. Sign on to all computers as a Microsoft Windows Administrator.

-
4. If you use a software-based firewall, you must temporarily disable it to install the software.
 5. During installation, you can select Custom to install to a non-default location. To install Sage ACT! 2011 and/or Microsoft SQL Server Express to a location other than the default location, do the following:
 - a. For Sage ACT! 2011: Verify directories exist and folder-sharing rights are enabled.
 - b. For SQL Server Express: Ensure the installation folders are unique to this instance of SQL Server. None of the directories should be shared with directories from other instances of SQL Server. For more information, see Microsoft documentation.
 6. If you plan to install Sage ACT! Premium (Web client), do the following:
 - a. Sage ACT! Premium (Web client) requires IIS and ASP.NET to run in 32-bit compatibility mode. If you are running 64-bit versions of these applications and do not want Sage ACT! Premium (Web client) to automatically switch them to 32-bit mode, see "Troubleshooting Sage ACT! Premium (Web client)" in the *Sage ACT! Premium 2011 Web Administrator's Guide*.
 - b. See Microsoft documentation to help you plan your installation and prepare your Web server. You need to understand your operating system, Microsoft Internet Information Server (IIS), ASP.NET, and user permissions required to run a Web page.

-
- c. Install or enable the correct version of IIS for your operating system and verify it runs properly.
 - d. Verify ASP.NET impersonation authentication is enabled.
 - e. If using a firewall, enable an exception for World Wide Web services.
 - f. Give your Web server a static IP address and make a note of the IP address because you will need it later.
 - g. Gather the virtual directory names of other Web sites hosted on your Web server.
 - h. If you use Windows XP, disable Simple File Sharing.
 - i. If you plan to use Windows Vista[®] as a Web server to host Sage ACT! Premium (Web client), change the "sleep mode" setting to Never.

Installing Sage ACT! 2011

The installation program automatically checks for and installs required components. The component installation may require a restart of the computer. If a restart is required or components cannot be installed, a message appears. Follow the instructions.

TIP: You can copy the contents of the installation DVD to a network drive or external hard drive for installation on computers that do not have a DVD or CD drive.

Install Sage ACT! 2011

1. Close all open applications.
2. Insert the Sage ACT! 2011 DVD.

If the DVD does not automatically start, click the Start menu, and select Run. Type <drive letter>:SETUP. Click OK. Or, in the Start Search box, type <drive letter>: SETUP. Press Enter. (Substitute the appropriate drive letter).

3. From the browser page, click **Install [Sage ACT! Pro 2011]** or **[Sage ACT! Premium 2011]** or **[Sage ACT! Premium (Web) 2011]**.
4. Follow the onscreen instructions. Click **Next** to continue.
5. If prompted, agree to install the required components.
Installing the required components may take a few minutes depending on your computer's configuration. If prompted, a restart of your computer may be necessary.
6. You must **Accept** the License Agreement for installation to continue. (If you Decline, installation is cancelled). Click **Next**.

-
7. On the **Type of Install** page, **Typical** installation is selected by default. However, if you want to change the default settings, select **Custom**. Click **Next**.

For a Custom installation, you can:

- Select different installation folders for Sage ACT! and SQL Server.
- Install the software without installing SQL Server Express. To do this, clear the **Install SQL Server Express** check box.

IMPORTANT: Several Sage ACT! 2011 features do not function when you install without SQL Server Express. For more information, see the Knowledgebase and system requirements.

- Select who can use the software on the computer.
- Select the Start menu Program Folder for the software.
- Select to add the software icons to your desktop and Quick Launch toolbar.

The installation process starts. The amount of time required to install depends on your computer configuration.

8. On the **Install Complete** page, select or clear options. Click **Finish**.

If you selected the option to launch (start) the software, when it opens, you can register and activate the software, or open it in trial mode for 30 days.

If an Update message appears, you can click Yes to check for software updates, or you can click No to continue with registration or trial mode. You may receive other update notices as you use the software.

Registering and Activating Sage ACT! 2011

You must register and activate the software within 30 days of first use on each computer where it is installed. Registration and activation provides you with program updates, upgrade offers, and customer support options. A serial number is required to register. The serial number is printed on the DVD sleeve or is e-mailed to you in a purchase confirmation e-mail. You can register by Internet, telephone, or e-mail. (Registration by e-mail may not be available in some locales.)

Windows Vista: You must register the software as an Administrator. Close the application, right-click the Sage ACT! icon on the desktop or in the Program Files list. Click Run as administrator.

Register and activate the software

1. From the **Help** menu, click **Register Sage ACT!**.
2. On the first page, select a registration option. Click **Next**.
3. Follow the onscreen instructions. Click **Next** to advance.
4. When finished, click **Activate**.

If error messages appear, follow the instructions.

Next Step(s)

Sage ACT! Premium (Web client) Users:

- Set up user access to Sage ACT! Premium through an Internet browser. See the sections "Creating a Database" and "Adding Users" in this guide.
- Configure access for your Web users and complete other configuration tasks. See the *Sage ACT! Premium 2011 Web Administrator's Guide*.

All Users:

- Install other applications to use with the software. See the section "Installing Other Applications" in this guide.
- Get started using the software. See the section "Getting Started for New Users" in this guide.

Other Information

This section contains other information you may need to know to start using Sage ACT! 2011.

Sage ACT! 2011 includes several other services:

- Sage E-marketing for ACT! (powered by Swiftpage™, a third-party company). This is an email marketing service that enables you to execute marketing campaigns using techniques proven to build your business. To use this service, you must purchase a subscription and access content hosted by Swiftpage. However, a trial period to use the service is provided.

-
- Sage Business Info Services for ACT! (provided by Hoover's™, a third-party company). This service uses targeted prospect lists and business information from Hoover's and lets you access the information from Sage ACT!. To use this service, you must purchase a subscription and access content hosted by Hoover's. A free level as well as several purchase levels are available.

SData™ integration with Sage applications - Sage ACT! 2011 includes SData Integration with Sage accounting applications. SData™ (Sage Data™) is a Sage-wide interoperability technology that provides standard communication protocol between Sage applications. This integration lets you share information between Sage ACT! Pro or Sage ACT! Premium 2011 and a Sage SData™-compliant accounting application. (**Note:** SData™ integration is not available in Sage ACT! Premium (Web client)). For a list of compatible Sage accounting applications, see the Sage ACT! Knowledgebase.

Installing Other Applications

You can install the following applications for use with Sage ACT! 2011:

- Adobe Reader
- Sage ACT! Synchronization Services (available for Sage ACT! Premium only)

Adobe Reader

To view product documentation (accessed from the installation DVD browser and the software), you must have Adobe Reader installed. You can install a free copy of Adobe Reader from the Adobe Web site.

Install Adobe Reader

1. From the Sage ACT! 2011 DVD browser, click **Product Documentation**.
2. Click the link to go to the Adobe Web site.
3. Download and install Adobe Reader.

Sage ACT! Synchronization Services

Sage ACT! Premium offers two data synchronization services. These services let remote workgroup users, with their own Sage ACT! Premium database, synchronize their data to the main workgroup database. (For more information about database synchronization, see Help.) You can install one or both services depending on your needs. Sage ACT! Pro users can synchronize data between a main and remote database, but do not use the synchronization services. For more information about the type of data synchronization available to Sage ACT! Pro users, see Help.

Sage ACT! Network Synchronization Service – Used to synchronize Sage ACT! Premium databases 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. You can install the Sage ACT! Network Synchronization Service on the same computer as Sage ACT! Premium or on another computer.

Sage ACT! Internet Synchronization Service – Used to synchronize Sage ACT! Premium databases over the Internet when the main database is not open. This service requires a computer (located outside the firewall) with ASP.NET and a compatible version of Microsoft Internet Information Services (IIS) installed for your operating system. See System Requirements at www.act.com/2011sysreq.

Installing Sage ACT! Sync Services

The following explains how to install the Sage ACT! Sync services. After installing one or both of the services, you must set up (configure) them.

IMPORTANT: If you install the Sage ACT! Internet Sync Service on a computer that does not have Sage ACT! Premium installed, ensure the <computer name>\ASPNET account has read/write permissions on the Internet Sync install folder. For more information, see Help.

Install the Sync Services

1. Insert the Sage ACT! Premium DVD.
2. Click **Install Sage ACT! Synchronization Services**.
3. Do the following:
 - To install the Network Sync service, click **Sage ACT! Network Synchronization Service**.
 - To install the Internet Sync service on the IIS computer, click **Sage ACT! Internet Synchronization Service**.

-
4. Follow the onscreen instructions. Click **Next** to advance. Click **Finish**.

Next Step(s)

- Set up the Sync Services, see Help.

Getting Started for New Users

To help you get started using the software, you can read the *Quick Start for New Users Guide* and view some of the Featured Videos. These resources are available on the Sage ACT! 2011 Welcome Page.

To start entering your information, you need to create a database to store your contacts' details. If you want to share your information, and allow others to add their information to the database, you need to add the others as *Users* to the database.

When you open the software for the first time, you are prompted to create a new database or open an existing one. If you do not have an database, you would select to create one. If you are joining a workgroup and have been given details about a database that is already set up for you, you would select to open an existing database.

TIP: To see an example of a customized database, you can open the demonstration database, ACT2011Demo, which is installed with the software. You can view the sample contacts, groups, activities, and other data included in the database. The user name logon for the demo database is Chris Huffman with no password.

The following sections provide the steps to:

- Create a database.
- Add users to that database.

-
- Show you how to set up the software for use over a network.

Creating a Database

The following explains one way to create a database. If you know others will need access to the data, you can share the database. Once the database is created, you add the people requiring access as *Users*.

When you create a database, the database and a file that points to the database are created. The pointer file has a PAD extension. The .PAD file is used to open a database. For example, if you name the database "WorkDatabase", the pointer file is named WorkDatabase.PAD. If you share the database with others, you can send them a shortcut to the .PAD file so they can open the database. For more information, see "Sharing Databases" in Help.

IMPORTANT: For a Sage ACT! Premium (Web client) installation, if you use a single-server configuration, create the database on the *Web server*. If you use a multiple-server configuration, create the database on the *database server*.

Create a database

1. From the **File** menu, click **New Database**.
2. In the **Database name** field, type a name for the new database.

The name must begin with a letter. Do not include spaces or punctuation.
3. In the **Location** field, keep the default information, or to save the database to different location, click **Browse**. Select the location. Click **OK**.

-
4. In the **Currency** field, from the list, select a currency for the database.
 5. To share the database with others, select the **Share this database with other users** check box.
 6. In the **User name** field, type the name of the person who will be logging on to the database.

This step creates a contact record known as My Record and in most cases, this will be your name. This contact is given the Administrator security role. (For more information about user security roles and the features and data they can access, see Help.)

7. To set a logon password for the user, in the **Password** field, type a password and type it again to confirm.

CAUTION: If you forget this password, you will not be able to access the database. You will have to contact Technical Support.

8. Click **OK**.

Adding Users

If other people need access to the database, you must add them as Users. You can assign them security roles and permissions to limit their access to data and features. You can add any number of users. However, you are limited by your license for the number of users that can be *active*.

Add a user

1. From the **Tools** menu, click **Manage Users**.
2. On the **Select a User** page, under **User Tasks**, click **Create New User**.

-
3. On the **Create New User** page, select an option for the source of the user information. Click **Next**.
 4. On the **Enter User Information** page, complete the **User Name**, **Security Role**, and **Password** fields. Click **Next**.
 5. On the **Specify Access** page, select a logon access option. Click **Next**.
 6. On the **Add Permissions** page, use the arrow buttons to add or remove permissions for the user.

By default, some permissions are automatically added for the user because of the security role selected for him or her. You can add or remove as needed.
 7. Click **Finish**.

Setting Up For Use Over a Network

The following explains how to set up the software and database to be used over a local area network (LAN) or a virtual private network (VPN).

TIP: If you do not use the server (host) computer to access the database, you can use one of the same serial numbers for a client computer.

Set up for use over a network

1. Ensure each computer (host and clients) has a licensed copy of the software.
2. Verify each computer has the same version of the software installed. To check the version: From the Help menu, select About Sage ACT!. The version number appears at the top of the page.

-
3. Add Sage ACT! 2011 to the list of firewall exclusions. Refer to Windows Help for more information.
 4. On the host computer, do the following:
 - a. Create a database and share it.
 - b. Add users to the database.
 - c. Close Sage ACT! 2011.
 - d. To set sharing rights, permissions for full read/write access, and full security rights to the database folder and its supplemental files for all users, browse to the **Databases** folder. Set sharing, permissions, and access.

By default, depending upon the operating system you use, the Databases folder is installed to the \\Users\[*username*]\Documents\ACT\ACT Data or \\Documents and Settings\[*username*]\ACT\ACT Data location. For more information about databases, supplemental files, and personal supplemental files, see Help.

- e. To allow sharing of personal supplemental files, such as saved documents, Internet links, and dictionaries between users, create a shared folder for each type of data and allow full control to all users.
 - f. Copy the database's .PAD file to a network location so that you can access it from each client's computer or copy it to a USB memory stick.
 5. On each client computer, do the following:
 - a. Browse to and open the **Databases** folder.
 - b. Paste the .PAD file copied from the host computer.
 - c. Double-click the .PAD file to open the database.
-

-
- d. To share the user's saved documents, Internet links, and dictionaries, change the Preferences setting: From the **Tools** menu, select **Preferences**. On the **General** tab, in the **Personal Files Locations**, change the locations to the shared folders on the host computer.