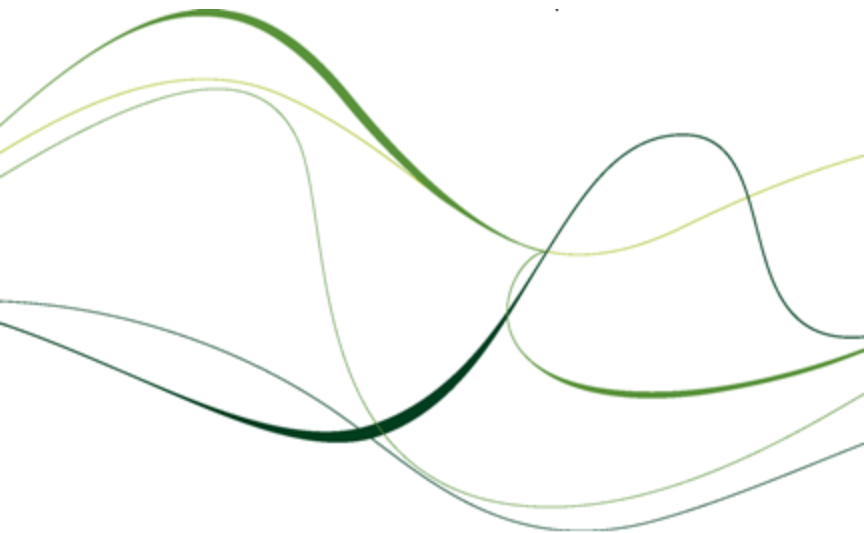


Installing Sage ACT! 2012 for New Users



sage

Installing Sage ACT! 2012 for New Users

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Contents

Introduction.....	i
Installing Sage ACT! 2012.....	1
Getting Started For New Users.....	9
Installing Other Applications.....	15

Introduction

Welcome to Sage ACT! 2012. Sage ACT!, the #1 Contact and Customer Management choice of small businesses and sales teams, is designed to help you build the long-lasting, profitable relationships your business thrives on.

Who Should Use This Guide?

You should use this guide if you do not have any version of ACT! or Sage ACT! installed. You are a "New User."

If you have a version of ACT! or Sage ACT! installed, DO NOT USE THIS GUIDE. You are an "Upgrade Customer." This guide is for New Users only. See the following guide for your installed version:

I have ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) installed. See the *Upgrading to Sage ACT! 2012 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)* guide available as a PDF on the installation panel under Product Documentation.

I have an ACT! version other than ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) installed. See the *Upgrading to Sage ACT! 2012 from ACT! versions 2005 (7.x) - 2011 (13.x)* guide available as a PDF on the installation panel under Product Documentation.

Adobe® Reader® is required to access and view product documentation from the installation panel. For instructions on obtaining Adobe Reader, see ["Installing Other Applications"](#) on page 15.

About This Guide

This guide provides installation and getting started instructions for New Users of:

Sage ACT! Pro 2012 – For professionals who work alone or in small workgroups of up to 10* users.

Sage ACT! Premium 2012 – For professionals who work in business teams and workgroups. This version includes access via Windows® (desktop) and web. If you are installing access for users via the web, then you will need this guide and the *Sage ACT! Premium 2012 Web Administrator's Guide* to complete installation and configuration. The Web Administrator's Guide is available on the web product's installation panel under Product Documentation. You can browse the installation files directory for the guide as well. It is recommended that you read the Web Administrator's Guide before installing the web version.

Features exclusive to Sage ACT! Premium or Sage ACT! Premium (access via web) are noted in the guide. In most sections, we refer to all versions as Sage ACT! 2012.

* Some operating systems may limit concurrent connections.

Installing Sage ACT! 2012

The following sections explain the required components, other considerations, and how to:

- Prepare to install.
- Install Sage ACT! 2012.
- Register and activate the software.

Required Components

To install and function correctly, Sage ACT! 2012 requires the following components:

- Windows® Installer 4.5
- .NET Framework 3.5 SP1
- Microsoft® SQL Server® 2008 R2 Express

If you do not have a required component, it is installed for you. To help you plan your installation, a page appears listing the needed components for your operating system, approximate install time, and if a restart (reboot) is required. You can select to continue the installation or cancel and install later.

NOTE: You can choose to skip installation of SQL Server Express if users will be connecting to a shared Sage ACT! database with SQL Server. However, SQL Server Express must be installed on the computer hosting the shared database. For Sage ACT! Premium (access via web) users, SQL Server Express must be installed on the database server or web server, depending on your configuration. See the *Sage ACT! Premium 2012 Web Administrator's Guide*.

Preparing to Install

Before installation, complete these steps in the order presented. If you plan to install Sage ACT! Premium (access via web), you must also complete the second set of steps.

Prepare to install (all versions)

1. Ensure your computer (or all computers in a shared environment) meet the minimum recommended system requirements for your purchased product and operating system. Also, verify you meet the concurrent user limits and licenses. See system requirements at: www.act.com/2012systemreq.
2. Ensure you are current with Microsoft critical and recommended updates.
3. Restart all computers to free available resources before you install.
4. Sign on to all computers as a Microsoft Windows Administrator.
5. Disable any software-based firewalls. You can enable these after installing Sage ACT! 2012.
6. Sage ACT! 2012 integrates with compatible versions of Microsoft Outlook, Word and Excel. For compatible versions, see www.act.com/2012systemreq. Ensure the Microsoft software is installed and working correctly before installing Sage ACT! 2012. You must have an Outlook profile configured for Outlook integration setup.

Prepare to install Sage ACT! Premium (access via web)

1. Sage ACT! Premium requires that Microsoft Internet Information Services (IIS) and ASP.NET run in 32-bit compatibility mode. If you use 64-bit versions of these applications and do not want the installer to switch them to 32-bit mode, see the solution under "General Errors and Issues" in the "Troubleshooting Sage ACT! Premium (access via web)" section of the *Sage ACT! Premium 2012 Web Administrator's Guide*.
2. See Microsoft documentation to help you plan your installation and prepare your web server. You need to understand your operating system, IIS, ASP.NET, and user permissions required to run a web page.
3. Install, or enable, the correct version of IIS for your operating system. Verify it runs properly. Some supported operating systems automatically install IIS, however, you may have to enable it.
4. Install ASP.NET or verify that ASP.NET impersonation authentication is enabled.
5. If you are using a firewall, enable an exception for World Wide Web services.
6. Give your web server a static IP address and make a note of it. You will need it later when you configure access.
7. Gather the virtual directory or virtual server names of other web sites hosted on your web server.

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8. If you use Windows XP, disable Simple File Sharing.
 9. If you use Windows Vista[®] as a web server to host Sage ACT! Premium (access via web), change the "sleep mode" setting to Never.

Installing Sage ACT! 2012

After you have prepared to install, complete these steps in the order presented to install Sage ACT! 2012.

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.

IMPORTANT: If you are installing Sage ACT! Premium 2012 (access via web) in a multiple-server configuration, install the application on the database server (even though you will be running it from the web server). Installing on the database server creates the Microsoft SQL Server instance for Sage ACT!. You connect to the database from the web server.

Install Sage ACT! 2012 (all versions)

1. Do one of the following:
 - Complete the download process from the Sage ACT! web site.
 - Double-click the **setup.exe** file if you are installing Sage ACT! from a network location.
 - Insert the installation DVD. The installation program should automatically start, but if it does not, click Start, and select Run. Type <drive letter>:SETUP.

The installation panel appears with links to install Sage ACT!, install Synchronization Services (Sage ACT! Premium only), and access product documentation and online resources.

NOTE: In the installation process, if a message appears about Microsoft .Net Framework 4 Client Profile, you can just click OK to continue. No action is necessary.

3. Click **Install Sage ACT!**.
TIP: You can continue working in Microsoft applications during Sage ACT! installation. However, if you want to integrate Sage ACT! with these applications, you must restart them for integration tools and menus to appear.
4. On the **Installation Requirements** page, review the information. To continue with installation, click **Next**. (To cancel and install later, click Cancel.)
5. If prompted, agree to install the required components. A restart may be necessary after installation. **NOTE:** If installation does not automatically start after a required restart, click Setup.exe to continue.
6. On the **Regional Version** page, select the version to install. Click **Next**.
7. On the **License Agreement** page, read the agreement, and then click **Accept**. (If you Decline, installation is cancelled.)

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8. On the **Type of Install** page, **Typical** installation is selected by default. To change the default install settings, select **Custom**. Click **Next**.

NOTE: With a Custom installation, you can select to install Sage ACT! 2012 without SQL Server Express 2008 R2. To do this, clear the Install SQL Server Express check box on the next page.

IMPORTANT: If you do not install SQL Server Express, you cannot create or restore a database. However, you can connect to a shared database. For more information, see the Knowledgebase and system requirements. Other custom options let you choose where to install Sage ACT! and SQL Server Express, select who can use Sage ACT!, specify icons for Quick Launch, and where to place Sage ACT! in the Start Menu.

9. When the **Install Complete** page appears, click **Finish**.
10. (Optional) To close the installation panel, click **Exit**. You can use this panel again to access and print product documentation or to install Sage ACT! Premium Synchronization Services.

To open Sage ACT!: Double-click the Sage ACT! icon on the desktop. Or, on the Start menu, under Programs, point to the Sage ACT! program folder, and then click Sage ACT!. When the software opens, you are prompted to register and activate it. You can choose to register now or use the software for a trial period of 30 days. For more information about the trial period, see Sage ACT! Help.

Registering and Activating Sage ACT!

You must register and activate Sage ACT! within 30 days of first use on each computer where it is installed.

Registration and activation provides you with program updates and customer support options. A serial number is required to register. The serial number is printed on the DVD sleeve or is emailed to you upon purchase. You can copy the serial number from the product activation email and paste it into the registration page.

Windows Vista and Windows 7: You must run the software as an Administrator to register it. Close Sage ACT!. 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. On the **Help** menu, click **Register Sage ACT!**.
2. Select a registration option. Click **Next**.
3. Follow the on-screen instructions. Click **Next** to advance.
4. When finished, click **Activate**. If error messages appear, follow the instructions.

Next Step(s)

Single Users:

- Create a database. See the section ["Getting Started For New Users"](#) on page 9.

Sage ACT! Premium (access via web) Users:

1. Create a shared database and add users to it. See the section ["Getting Started For New Users"](#) on page 9.
2. Configure access for your web users and complete other configuration tasks. See the *Sage ACT! Premium 2012 Web Administrator's Guide*.

Workgroup Users:

1. Create a shared database and add users to it. See the section ["Getting Started For New Users"](#) on page 9.
2. If you plan to synchronize data with a remote office, you can:
 - a. Create new remote databases for database synchronization. For more information, see ["About Database Synchronization"](#) in Help.
 - b. Install the Sync Services. See ["Installing Other Applications"](#) on page 15.

All Users:

- Read the *Quick Start for New Users* guide to learn how to import your data into the database, or watch Featured Videos, accessed on the Welcome Page in Sage ACT!.

Getting Started For New Users

This section contains information to help you get started using Sage ACT!. Sage ACT! uses a database to store your contacts' information. 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* and *share* the database. You can share the database over a network.

About Databases And The Demo Database

When Sage ACT! opens, you are presented with options to either create a new database or open an existing database. If you do not have a Sage ACT! database, you would select to create one. If you are a new user in a workgroup and have information about a Sage ACT! database you are sharing, you would select to open an existing database.

When you create a database, Sage ACT! also creates the supplemental files the database uses and a file that points to the database. The pointer file has a PAD extension. The .PAD file is used to open the database. The name you provide for the database is also used to name the supplemental files and .PAD file. This helps you to locate the files for each database you use. For example, you name the database "WorkDatabase." The supplemental files folder is named "WorkDatabase-database files" and 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 and access the supplemental files. For more information about databases and supplemental files, see "Learning About Databases" in Help.

To see an example of a Sage ACT! database, you can open and view the demonstration database installed with the software. This demo database contains sample contacts, groups, companies, opportunities, activities, and other data.

Open the demo database

1. On the first screen, select **Open an existing Sage ACT! database**. Click **OK**.
2. In the **Open/Share Database** dialog box, select **ACT2012demo**. Click **Open Database**.
3. If the logon window appears, type Chris Huffman in the user name. No password needed.

Creating A Database

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

<p>Windows Vista and Windows 7: You must run the software as an Administrator to create a database and share it. Close Sage ACT!. Right-click the Sage ACT! icon on the desktop or in the Program Files list. Click Run as administrator.</p>
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IMPORTANT: For Sage ACT! Premium (access via web), on a single-server configuration, create the database on the *web server*. On a multiple-server configuration, create the database on the *database server*.

Create a database

1. On the **Welcome** screen, select **Create a Sage ACT! database**. Click **OK**.
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.
4. From the **Currency** 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.

IMPORTANT: This step creates a contact record known as "My Record." 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. 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**.

The database is created and opened for you. It contains one contact record with the user name you provided.

Adding Users

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

Add a user

1. On 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, keep the default option **Create new User who is not in your database**. Click **Next**.
4. On the **Enter User Information** page, complete all fields. Be sure to select a **Security Role** for the user. Click **Next**.
5. On the **Specify Access** page, select whether the user is Active or Inactive. (Inactive users cannot log on to the database.) Click **Next**.
6. On the **Add Permissions** page, use the arrow buttons to add or remove permissions for the user. Permissions are automatically assigned to the user based on their security role. Click **Finish**.

Sharing A Sage ACT! Database Over A Network

The following explains how to set up a shared Sage ACT! database on host and client computers to be used over a local area network (LAN) or a virtual private network (VPN). The host and client computers must be able to connect to each other over the LAN or VPN.

Sharing a database over a network

1. Ensure each computer (host and clients) has a licensed copy of the software.
2. Add Sage ACT! 2012 to the list of firewall exclusions. Refer to Windows Help for more information.
3. On the host computer, do the following:
 - a. Create a database and share it. Note the location of the database's .PAD file.
 - b. Add others on the client computers as Users in the database. Note their user names and passwords.
 - c. Email the .PAD file to others on the client computers along with their user names and passwords to access the database.
4. On each client computer, have users do the following:
 - a. Paste the .PAD file to their desktop.
 - b. Double-click the .PAD file to open the database.
 - c. Enter their user name and password to access the database.

Sage Connected Services for ACT!

Sage ACT! 2012 offers subscription-based services, most with trial periods or free levels, and links to integrated applications. To see all services and integrated apps, on the left navigation bar in Sage ACT!, click Connections.

Sage E-marketing for ACT! (powered by Swiftpage™, a third-party company). A subscription-based email marketing service that executes marketing campaigns using techniques proven to build your business.

Sage Business Info Services for ACT! (provided by Hoover's™, a third-party company). A subscription-based service that provides targeted prospect lists and business information from Hoover's and lets you access the information from Sage ACT!.

Sage ACT! Connect*. A subscription-based cloud service that delivers Sage ACT! contacts and calendar through a supported web browser.

Microsoft Outlook and Office Integration. You can integrate Sage ACT! with Microsoft Outlook, Word, and Excel. You can synchronize your Outlook contacts and calendar with Sage ACT!.

Google® and Gmail® Integration. You can integrate Sage ACT! with your Google contacts and calendar and record histories of emails sent or received from your Gmail account.

*Review Sage ACT! Connect system requirements at www.act.com/connectsystemreq to confirm supported web browsers, tablets, and mobile phones.

Installing Other Applications

The section explains how to install:

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

Adobe Reader

You must have Adobe Reader installed to view product documentation. You can install a free copy from the Adobe web site.

Install Adobe Reader

1. On the installation panel, click **Product Documentation**.
2. Click the link to go to the Adobe web site to 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 without Sage ACT! Premium being opened and active. You can install one or both services depending on your needs. For more information about database synchronization, see Help.

Sage ACT! Network Synchronization Service. Lets you synchronize Sage ACT! Premium databases over a network. This service can be used by remote users connected to the main database via a Local Area Network (LAN), Wide Area Network (WAN), or a Virtual Private Network (VPN). You can install the service on the same computer as Sage ACT! Premium or on another computer.

Sage ACT! Internet Synchronization Service. Lets you synchronize Sage ACT! Premium databases over the Internet. This service requires a computer (located outside the firewall) with ASP.NET and Microsoft Internet Information Services (IIS) installed (compatible with your operating system). See system requirements at: www.act.com/2012sysreq.

NOTE: Sage ACT! Pro users can synchronize data between a main and remote database, but do not use the synchronization services. For Sage ACT! Pro database synchronization, the Sage ACT! application must be open on the computer hosting it. For more information, see Help.

Installing Sage ACT! Sync Services

The following explains how to install a Sage ACT! Sync service. You install one service at a time. After installation, you must set it up (configure it).

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 a Sync Service

1. Open the installation panel, double-click the **setup.exe** file, or insert the installation DVD.
2. On the installation panel, click **Install Sage ACT! Synchronization Services**.
3. Click the link to install a sync service.
4. Follow the on-screen instructions. Click **Next** to advance. Click **Finish**.

Next Step(s)

1. Set up the Sync Services. See Help.
2. Get started using Sage ACT! Premium.

Important Notes:

For Sage ACT!: You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Review Sage ACT! system requirements at www.act.com/2012sysreq. Visit www.actsolutions.com or contact your add-on product provider to determine compatibility for your add-on products.

For Sage Connected Services for ACT!: Review Sage ACT! Connect system requirements at www.act.com/connectsysreq to confirm supported web browsers, tablets, and mobile phones. The mobile component of Sage ACT! Connect requires an active data plan. You are responsible for all data related charges to your mobile phone. To facilitate mobile setup, Sage ACT! Connect sends a text message to your mobile phone. Based on your wireless plan, you may receive an extra charge from your carrier for this text message.

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