



Scope of Act! Support Services

Technical support offered by Act! as part of the Act! Subscription Service covers use of Act! in line with system requirements and recommended platforms. In summary, the scope of technical support is:

- Guidance on installation
- An overview of application features
- Troubleshooting of any errors within Act!

Should you require any services outside the subscription support service coverage, training or advice on a consultative level, please contact one of our [Act! Certified Consultant](#).

See the table below for details on support coverage:

Category	Act! Subscription Service Coverage	Outside Subscription Service Coverage
Hardware, operating systems (OS), database platforms, Internet information server (IIS), browsers, etc.	Provide system requirements. Provide steps on any specific configuration. Provide instructions to add Act! and SQL exceptions to the Windows firewall only.	System Recommendations. Installation of 3rd party applications and hardware. Troubleshooting stability, performance or other problems. Troubleshooting operating system issues – firewall, antivirus, permissions, etc.
Installation & Upgrades	Provide installation or upgrade documentation. Provide KB articles to assist troubleshooting any errors encountered during an installation or upgrade.	Local (on-site) installation services. Consulting services to install or resolve non-Act! installation issues specific to your organisation's technical environment hands-on deployment and installation. Database conversions from earlier versions of Act! and other CRMs. Act! integration to supported 3rd party software.
Remote Synchronisation	Troubleshooting connectivity issues within your Act! Cloud product. Provide instructions for Synchronisation wizards.	Understand and explain requirements for creating sync sets & remote database deployments. Troubleshoot problems when configuring or using synchronisation within Act!.
Database Customisation	Database customisations are not covered under Act! Subscription support.	Changes to your layout, including creating and adding fields, customising columns, adding menus and toolbars. Troubleshoot problems encountered during database customisation in Act!. For complete layout design service, contact your Act! Certified Consultant.



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Creating/Editing Reports & Templates	Provide instructions to edit a report or word template.	Understand requirements and make recommendations for running, creating or editing Reports & Templates. Troubleshoot issues encountered using existing Reports & Templates in Act!. Microsoft Word support. Assistance connecting your Act! data to third party reporting tools.
Importing and Exporting Data	Provide instructions to import or export data from Act!. Review data format for import into Act!.	Understand requirements and make recommendations for importing and exporting data. Edit source data such as excel or CSV. Exporting data from third party software or validating/formatting it for you, so that it can be imported into your Act! product. Creating your data definition files or mappings for data import.
Network Connectivity	Troubleshooting connectivity to Act! Cloud when Internet connectivity is working.	Troubleshooting internet connectivity. Troubleshooting other connectivity issues that exist outside of your Act! product. Assistance with unsupported networks. Installation, troubleshooting or configuration of network (WAN/LAN) security/cards/cabling/hardware/software.
Act! emarketing and Swiftpage emarketing	Provide instructions on how to edit templates using the inbuilt template editor. Account access and billing issues Problems accessing the service.	Advise on template and campaign design. Training on the design interface.