



# Installing Act! for New Users

## ***Installing Act! for New Users***

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Released 03/2021 for Act! V23

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### **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 Act!, and then click the View End User License Agreement link.

### **Published by**

Act! LLC

621 17th Street, Suite 500

Denver, CO 80293

Act! helps organise all your prospect and customer details in one place so you can prioritise your day and market your products and services more effectively, driving sales results while creating customers for life.

## Who Should Use This Guide?

You should use this guide if you do not have any version of Act! installed. This guide provides installation instructions for New Users of Act!.

Act! includes access via Windows<sup>®</sup> (desktop) and web. If you are installing access for users via the web, then you will need this guide and the *Act! 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. We recommend that you read the Web Administrator's Guide before installing the web version.

If you have a version of Act! installed, DO NOT USE THIS GUIDE. You are an "Upgrade Customer." Open the Product Documentation page from the installation panel to access the appropriate upgrade guide.

## Preparing to Install

Before installation, complete these steps.

### Prepare to install

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/systreq](http://www.act.com/systreq).
2. Sign on to all computers as a Microsoft Windows Administrator.
3. (Recommended) Disable any software-based firewalls. You can enable these after installation.

### Prepare to install Act! (Web)

1. Act! 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 Act! (Web)" section of the *Act! Web Administrator's Guide*. IIS 7 allows both 32-bit and 64-bit processes to run simultaneously.
2. Install ASP.NET or verify that ASP.NET impersonation authentication is enabled.
3. If you are using a firewall, enable an exception for World Wide Web services.

## Installing Act!

Complete these steps to install Act!.

## Install Act!

1. Close all open applications.
2. Do one of the following:
  - Complete the download process from the Act! web site.
  - Double-click the **setup.exe** file if you are installing from a network location.
3. On the main installation screen, click **Install Act!**.
4. On the **Installation Requirements** page, review the information. Click **Install** to continue.
5. If prompted, agree to install the required components. A restart may be necessary after installation. **NOTE:** If the 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**.
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 Act! without SQL Server Express. 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. SQL Server Express must be installed on the computer hosting the shared database. For Act! (Web) users, SQL Server Express must be installed on the database server or web server, depending on your configuration. Other custom options let you choose where to install Act! and SQL Server Express, select who can use Act!, specify icons for Quick Launch, and where to place Act! in the Start Menu.

9. When the **Install Complete** page appears, click **Finish**.
10. To close the installation panel, click **Exit**.

To open Act!: Double-click the Act! icon on the desktop. Or, on the Start menu, under Programs, point to the Act! program folder, and then click Act!. When the software opens, you are prompted to register and activate it.

## Registering and Activating Act!

You must register and activate 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 emailed to you upon purchase. You can copy the serial number from the product activation email and paste it into the registration page.

### Register and activate the software

1. On the **Help** menu, click **Register Act!**.
2. Select a activation option. Click **Next**.

#### **If you choose to Activate your licence online:**

3. Enter your contact information.
4. Click **Next**.
5. Enter your **serial number**.
6. Click **Next**.
7. Click **Finish**.

#### **If you choose to Activate your licence offline:**

8. Enter your **serial number**.
9. The **Computer Identifier** field will automatically populate.



The next step is to retrieve the Computer Key. Act! needs this key for activation. The only way to do this through Offline Activation is to call the phone number on the screen and manually activate with an Act! representative.

10. Enter the **Computer Key**.
11. Enter the key , click **Next**.



The Act! representative will also email the customer with an important file, named “**QlmProductProperties.xml**.” The customer must place this file into their **C:\ProgramData\Act** folder.

12. Click **Finish**.

## 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*.

### Create a database

1. On the **Welcome** screen, select **Create an 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 "What are User Roles and Permissions" in 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 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.

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 **Edit 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 an Act! Database Over A Network

The following explains how to set up a shared 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.

1. Ensure each computer (host and clients) has a licensed copy of the software.
2. If necessary, add Act! 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.

## Next Step(s)

After completing your installation, you can begin using Act!.

- If you are installing Act! (Web), you must configure access for your web users and complete other configuration tasks. See the *Act! Web Administrator's Guide*.
- Remote users access a local, or remote, database to view or change information, and then synchronize with the main database so that both databases have the same information. If you are adding remotes to your installation, complete the following:
  - Create new remote databases. See "About Database Synchronization" in Help.
  - Install the Sync Services. See "Installing Sync Services" in Help.

## Act! Getting Started Resource Center

You can get up and running quickly and easily with free self-service resources that are available whenever you are. Visit the Getting Started Resource Center at [www.act.com/resourcecenter](http://www.act.com/resourcecenter) to:

- Watch instructional videos and guided feature tours.
- Download printer-friendly guides.
- Access the [www.act.com/knowledgebase](http://www.act.com/knowledgebase), and more.

## Notes

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