

## **Installing Sage ACT! 2013 for New Users**

## ***Installing Sage ACT! 2013 for New Users***

Copyright © 2012 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 either registered trademarks or trademarks of the Microsoft Corporation group of companies in the United States and/or in other countries.

All other trademarks are the property of their respective owners.

Released 8/2012 for Sage ACT! Pro 2012 and Sage ACT! Premium 2012

Version: UA15-535

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.

### **Published by**

Sage Software, Inc.

8800 N. Gainey Center Drive, Suite 200

Scottsdale, AZ 85258

---

Welcome to Sage ACT! 2013. 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. This guide provides installation instructions for New Users of:

- Sage ACT! Pro 2013 - For professionals who work alone or in small workgroups of up to 10\* users.
- Sage ACT! Premium 2013 - For professionals who work in business teams and workgroups.

Sage ACT! Premium 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 2013 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. It is recommended that you read the Web Administrator's Guide before installing the web version.

---

If you have a version of ACT! or Sage 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.

\* Some operating systems may limit concurrent connections.

## Preparing to Install

Before installation, complete these steps.

### **Prepare to install (Sage ACT! Pro and Sage ACT! Premium)**

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 installing Sage ACT!.

---

## **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 2013 Web Administrator's Guide*.
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.
4. If you use Windows XP, disable Simple File Sharing.
5. 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! 2013

Complete these steps to install Sage ACT! Pro or Sage ACT! Premium 2013.

### Install Sage ACT! 2013

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.

---

**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.

---

2. On the main installation screen, click **Install Sage ACT!**.
3. On the **Installation Requirements** page, review the information. Click **Install** to continue.

- 
4. 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.
  5. On the **Regional Version** page, select the version to install. Click **Next**.
  6. On the **License Agreement** page, read the agreement, and then click **Accept**. (If you Decline, installation is canceled.)
  7. 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! 2013 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 Sage ACT! Premium (access via 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 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.

---

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

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.



---

## 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**.

---

## 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 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 "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 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.

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 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. If necessary, add Sage ACT! 2013 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 Sage ACT!.

- If you are installing Sage ACT! Premium (access via web), configure access for your web users and complete other configuration tasks. See the *Sage ACT! Premium 2013 Web Administrator's Guide*.
- If you are adding remotes to your installation, complete the following. 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.
  - Create new remote databases. For more information, see "About Database Synchronization" in Help.
  - Install the Sync Services. See "Installing Sync Services" in Help.

---

## **Sage 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 Sage ACT! Knowledgebase, the Sage ACT! Community forums, and more.

---

## Notes