Sage ACT!

Upgrading to Sage ACT! 2013 from ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004)

sage

Released 08/2013 for Sage ACT! Pro 2013 and Sage ACT! Premium 2013
Version: UA07_07312012

Important Note

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

For Sage ACT! Connect:

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.

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

Sage E-marketing for ACT! is powered by Swiftpage™.

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
10 9 8 7 6 5 4 3 2 1

Contents

Introduction

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 have ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) installed. If you do not have one of these versions installed, then use a different guide:

I do not have any version of ACT! or Sage ACT! installed. You are a "New User." See the *Installing Sage ACT! 2013 for New Users* 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! 2013 from ACT! versions 2005 (7.x) - 2012 (14.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.

About This Guide

This guide explains how to upgrade and convert your database to Sage ACT! 2013 or Sage ACT! Premium 2013.

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. 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! 2013.

`

What You Should Know Before You Convert Your Database

Upgrading to Sage ACT! 2013 from ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) requires you to convert your database. It is important that you:

- Understand the available database conversion types and considerations for data conversion.
- Understand the changes that happen to your data during conversion and the items that do not convert.

Be sure to read the entire upgrading document before beginning your upgrade and database conversion.

What Is Database Conversion and Which Type is Best?

Database conversion maps data from the fields in your ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database to the fields in a Sage ACT! 2013 database.

You can convert all data (including custom fields) using the Standard conversion. However, if one of the following scenarios applies to you, use the Custom conversion.

- I have custom fields in my ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database that are used as phone, address, or e-mail fields. I want these fields to be available when I use lookup to search for data in phone, address, or e-mail fields. Use the Custom conversion and set your phone, address, and e-mail fields to the correct field "type". For example, a custom phone number field should be converted to a field of type "phone".

- I have custom fields in my ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database that are used to store secondary contact information. Use the Custom conversion and convert your custom contact fields to secondary contacts. For example, if you have a custom field named "office manager", you can convert the data in this field to a secondary contact that is associated to the primary contact and linked to the contact record.

Database Conversion Considerations

Note the following considerations before you convert your database.

Conversion increases a database size. Sage ACT! 2013 uses Microsoft® SQL Server® 2008 Express R2, which limits database size to ten gigabytes (GB). Your database will not convert if it is over ten GB.

Conversion copies the original database. The copy is converted. The original database remains.

Who can convert a database? You must be an Administrator user in the ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database to convert it.

Converting supplemental files. To use existing supplemental files, such as layouts, templates, or reports, with Sage ACT! 2013, you must convert them. Steps for supplemental file conversion are given later in this guide.

Converting attachments. To convert attachments to records, you can convert them as *files* or *shortcuts*. File attachments are copied to the database's supplemental file location, backed up with the database, and synchronized to remote databases. Shortcuts keep files in their original location, are not backed up, and do not synchronize with remote databases.

Converting users. To convert more than one ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database user, select the "Share Target Database" option during conversion. Additionally: If you plan to install Sage ACT! Pro, and your existing database has more than 10 users, you can select nine other users who can be active in the converted database. You, as the Administrator, convert as the 10th active user. Other users convert with an inactive logon status. If you plan to install Sage ACT! Premium (access via web), you must share the database.

Changes to database and other synchronization options. Synchronization options changed after the ACT! 6.x release. If you synchronize databases, you must synchronize to one database, and then convert that database. You can create up to 50 remote databases in Sage ACT! 2013 after you convert the one, main database.

Data Changes During Conversion

The following items describe what happens to your ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) data during conversion.

Field Changes. Fields set to "Not Allow Editing" convert as Read-Only fields.

Group Changes. Group members convert as static members. Membership based on dynamic queries is retained, but the queries are lost. If a public group has a private subgroup, the subgroup converts to a public group. A private subgroup with a different Record Manager than its parent group converts to a private group.

Opportunity Changes. All opportunity processes convert as "Previous Sales Process". Opportunities without sales stages or probabilities convert as "New Opportunity stage" with 100% probability.

Contact E-mail Address Changes. If a contact has multiple e-mail addresses, they convert to new fields, but the new fields are not visible on layouts. You can add the fields to layouts through Define Fields. For more information, see Help.

Items That Do Not Convert

The following items do not convert. For most items, you can add or create them in the converted database.

- Activity series
- Group rules
- Menu, toolbar, and column customizations
- Saved reports (RPT files)
- Synchronization settings
- Outlook® activities updated into an ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) calendar
- Macros (no longer supported)
- Queries
- Some preferences
- Some formatting (additional editing and formatting may be required after conversion)

Installing Sage ACT! 2013

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

- Prepare a database for conversion.
- Prepare to install.
- Install Sage ACT! 2013.
- Register and activate the software.

Required Components

To install and function correctly, Sage ACT! 2013 requires the following components:

- Windows® Installer 4.5
- .NET Framework 4.0
- 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 2013 Web Administrator's Guide*.

Preparing a Database for Conversion

The following explains how to prepare an ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database for conversion.

Note: You can keep ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) on the same computer as Sage ACT! 2013 if you have a supported operating system. See system requirements at: www.act.com/systreq. You need to use ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) to prepare the database before converting it to Sage ACT! 2013.

Prepare a database for conversion

1. Turn off screen savers.
2. Close all other applications.
3. If you have multiple databases with different time zones, set them to a "home" time zone. Sage ACT! 2013 stores time zone values as Greenwich Mean Time (GMT) and not literal values.
4. If you have remote databases, synchronize them into one main database, since you cannot convert remote databases. You convert one database, and then use it to create up to 50 remote databases at one time for distribution.
5. If you have multiple users, make note of their user names and passwords.
6. Compress and re-index the database.
7. Remove old (obsolete) data.

8. Run the ACT! Diagnostic Tool:
   a. Click **Start**, select **Run**.
   b. Type **ACTDIAG**. Click **OK**.
   c. On the **Maintenance** menu, select **Scan Database Integrity**.
   d. When finished, ensure all items have a green check mark, which indicates a good condition.
   e. Close ACT! Diag.
9. Open ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) and save the database.

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/systreq.
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. (Recommended) Disable any software-based firewalls. You can enable these after installing Sage ACT!.
6. Sage ACT! 2013 integrates with compatible versions of Microsoft Outlook, Word and Excel. For compatible versions, see www.act.com/systreq. Ensure the Microsoft software is installed and working correctly before installing Sage ACT! 2013. 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 2013 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.
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! 2013

IMPORTANT: If you are installing Sage ACT! Premium 2013 (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! 2013 (all versions)

1. Close all open applications.
2. 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. On the main installation screen, click **Install Sage 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**. (If you Decline, installation is canceled.)
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! 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. 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. 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. 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):

- Convert the database and supplemental files.

Converting a Database and Supplemental Files

This section explains how to convert an ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database and supplemental files to the current version. It also contains information about connected services and integration with other applications available in Sage ACT! 2013.

Converting a Database

The following explains how to convert a database using Standard or Custom conversion.

Convert a database using Standard conversion

1. Open Sage ACT! 2013.
2. If the **Welcome** page appears, select **Open an existing Sage ACT! database**. Click **OK**. Or, on the toolbar, click **Open/Share Database**.
   a. In the **Open/Share Database** dialog box, click the **Database I want is not listed** link.
   b. In the **Files of type** field, select **ACT! 3.x–6.x Database (*.DBF)** from the list. You must select files of type DBF to see your database file.
   c. Select the database to convert. Click **Open**.
   d. If a verification message appears, click **OK**.
3. In the **Database Conversion Wizard**, follow the instructions as you select conversion options. Click **Next** to advance.

   Conversion options to select:

   - **Conversion types** - Select **Standard** conversion to use the default mapping. Otherwise, select Custom conversion and follow the steps in "Convert a database using Custom conversion."
   - **Converting attachments** - If the database has attachments, you can convert them as *files* if you want to copy them to the Database Supplemental files folder, or convert them as *shortcuts* to keep files in their original location.
   - **Share Target Database** - Select this if more than one user has log-on privileges in the database. **Important:** If you installed Sage ACT! Premium 2013 (access via web), the database must be shared.
   - **Select active users** - Users converting their database to Sage ACT! Pro see this option since that product is limited to 10 active users. If the database has more than 10 active users, you can select nine users besides yourself who can be active in the converted database. Other users convert as inactive users.
4. Click **Details** to see information about converted items. This information tells you the number of converted items and if any items did not convert. Click **OK**.
5. Click **Finish** to complete conversion.

Convert a database using Custom conversion

1. Open Sage ACT! 2013.
2. If the **Welcome** page appears, select **Open an existing Sage ACT! database**. Click **OK**. Or, on the toolbar, click **Open/Share Database**.
   a. In the **Open/Share Database** dialog box, click the **Database I want is not listed** link.
   b. In the **Files of type** field, select **ACT! 3.x–6.x Database (*.DBF)** from the list. You must select files of type DBF to see your database file.
   c. Select the database to convert. Click **Open**.
   d. If a verification message appears, click **OK**.

3. In the **Database Conversion Wizard**, follow the instructions as you select conversion options. Click **Next** to advance

   Conversion options to select:

   - **Conversion types** - Select **Custom** conversion to see the field mapping pages for custom fields.
   - **Converting attachments** - If the database has attachments, you can convert them as *files* if you want to copy them to the Database Supplemental files folder, or convert them as *shortcuts* to keep files in their original location.
   - **Share Target Database** - Select this if more than one user has log-on privileges in the database. **Important:** If you installed Sage ACT! Premium 2013 (access via web), the database must be shared.
   - **Select active users** - Users converting their database to Sage ACT! Pro see this option since that product is limited to 10 active users. If the database has more than 10 active users, you can select nine users besides yourself who can be active in the converted database. Other users convert as inactive users.
   - **Convert addresses, phone/fax numbers, and secondary contacts (if applicable)** - You can accept the default field mappings or make changes.
   - **Change the field mapping** - Click a field in the ACT! 3.0-6.0 field list. From the drop-down list, select the field to map. **Note:** If you changed the default field names of your secondary contacts, no default field mapping is available.
   - **Convert additional custom fields** - To convert additional custom fields, on each page of the Wizard where applicable, select the **I have more <Custom fields> to convert** option. Click **Next** and follow the instructions to convert additional custom fields.
4. Click **Details** to see information about converted items. This information tells you the number of converted items and if any items did not convert. Click **OK**.
5. Click **Finish** to complete conversion.

Additional steps to consider after database conversion:

- To add or change field mapping, use the Replace Field and Swap Field commands on the Sage ACT! Edit menu. You cannot replace and swap Secondary contact fields. For more information, see "Copying, replacing, or swapping data in fields" in Help.
- ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) did not have the Companies feature. A quick way to add companies in the converted database is to create a company record from the Company field in a contact record. For more information, see "Creating Companies from Contacts" in Help.

Converting Supplemental Files

You must convert supplemental files to access email attachments, templates, and other supplemental files created in ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004). The following explains how to convert supplemental files (layouts, templates, and reports) to use with Sage ACT! 2013.

Convert supplemental files

1. Open Sage ACT! 2013.
2. On the **Tools** menu, click **Convert ACT! 3.0 - 6.0 Items**.
3. On the **Select a Conversion Task** page, select an item to convert. For example, select Layouts.
4. Browse to the location of the file you want to convert. Follow the instructions on each page. Click **Next** to start conversion.
5. On the **Conversion Finished** page, click **Finish**.
6. Select another item to convert or click **Close**.

Additional steps to consider after supplemental file conversion:

- On converted layouts, some field labels may display as wrapped text. You may want to edit these field labels using the Layout Designer. For more information, see "Adding and Removing Fields, Images, Colors, and Tabs in Layouts" in Help.
- If you had multiple email addresses for a contact, these fields converted; however, you need to add the fields to your converted layouts. Open Define Fields (Tools>Define Fields) and ensure the fields can be added to layouts. Then, open the Layout Designer and add the fields.

Sage Connected Services for ACT!

Sage ACT! 2013 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 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/connectsystreq to confirm supported web browsers, tablets, and mobile phones.

Next Step(s)

Single Users:

- Read the *Quick Start for New Users* guide or watch Featured Videos accessed from the Welcome Page.

Sage ACT! Premium (access via web) Users:

1. Ensure your converted database users have "Active" status if you plan to give them web access. Go to Tools>Manage Users.
2. Configure access for your web users and complete other configuration tasks. See the *Sage ACT! Premium 2013 Web Administrator's Guide*.

Workgroup Users:

1. Read the *Quick Start for New Users* guide or watch Featured Videos accessed from the Welcome Page.
2. Create new remote databases for database synchronization. For more information, see "About Database Synchronization" in Help.

Installing Other Applications

The section explains how to install Sage ACT! Synchronization Services (available for Sage ACT! Premium only).

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/systreq.

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 "About Database Synchronization" in 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.

   If the required version of .NET Framework is not detected, it will be installed with the Synchronization Service components.
4. Follow the on-screen instructions. Click **Next** to advance. Click **Finish**.

Next Step(s)

1. Set up Sync Services. See one of the following topics in Help:
   - Setting Up and Managing the Internet Sync Service.
   - Setting Up and Managing the Network Sync Service.
2. Get started using Sage ACT!.