

## What Changes Were Made in ACT! by Sage 2007 (9.0)

### Question

You would like to know what changes were made in ACT! by Sage 2007 (9.0).

### Answer

Features improvement to the 2007 Product Family are focused in the areas of **User Productivity**, **Outlook® Integration**, and **Administration and Data Security**. Please review the following Answer for more information.

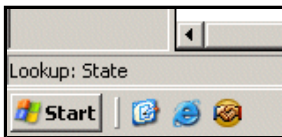
#### User Productivity – Search Capability:

##### Advanced Keyword Search:

You will automatically be taken to the exact location of your Keyword Search. Advanced Keyword Search locates and highlights terms in Contact, Group, and Company Detail Views, as well as, it opens the particular Note, History, Activity, or Opportunity so you can locate the information you need quickly and easily.

##### Lookup Indicator:

Easily determine which lookup you are viewing for Contacts, Groups, Companies, or Opportunities views. The Lookup Indicator appears in the lower left corner of the screen and indicates the type of lookup you are viewing whether it's all contacts, state, ID status, or one of the many available lookups within ACT!.



##### Editing Existing Queries:

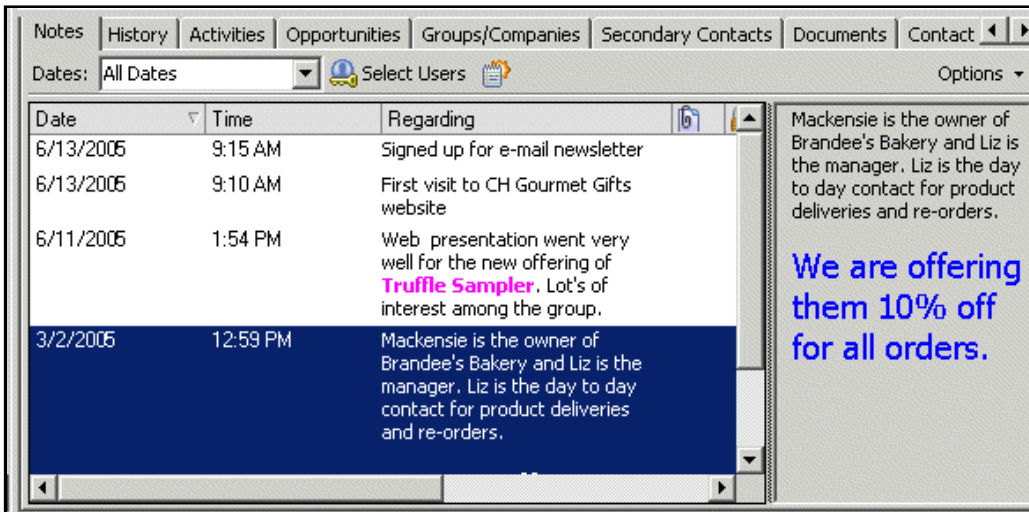
Easily edit an existing query statement to better suit your search needs and then save the new final query. You can edit fields directly within the query, rather than creating an entirely new query. For detailed information please refer to the following Knowledge Base Answer:

Title: How to Edit an Existing Advanced Query  
Answer ID: [19169](#)

#### User Productivity – Contact and Company Details:

##### Split-Panel Note Preview:

View the entire contents of a Contact, Group, or Company note while simultaneously scrolling for another note using the option of a split-panel within the Notes tab. Simply highlight the note from a list of notes on one side to preview its full contents on the other side of the split-panel. The split panel is adjustable on the fly.



##### Last E-mail Field:

From the Contact Detail View, quickly identify the last e-mail sent date for the given contact using the **Last E-mail** field. The **Last E-mail** field will update any time an e-mail history is created whether you are using the ACT! E-mail Client integrated with Lotus Notes® or Outlook Express or through integration with Outlook. This field may be placed any where on your Layout, it is on the **Contact Detail** view by default.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003. Requires Lotus Notes 6.5. Requires Outlook Express 5.5 or 6.0.

##### Specify Linked Contact/Company Fields:

Specify which fields you want linked between the Contact and Company Records so when the field changes on the Company Record, you are prompted to change that field for all contacts linked to the company. Users can view all linked fields prior to performing the update. In

ACT! 2006 and 2005 you were limited to only linking Company Name, Website, and Address fields. Now you can specify any user fields.

**Note:** Not all fields can be linked and linked field types must be compatible.

Please refer to the following Knowledge Base Answer:

Title: How to Manage Linked Company and Contact Fields  
Answer ID: [19170](#)

**Update Company Linked Fields from a Contact:**

Update all Company linked fields from within a Contact record ensuring you have accurate and up-to-date information from the Company record. This will only update the selected contact and not all contacts that are linked to this company.

**Note:** To update all contacts linked to this company you must use the **Update Linked Contacts** option from the **Companies** menu in the **Companies** view. Please refer to the following Knowledge Base Answer:

Title: How to Manage Linked Company and Contact Fields  
Answer ID: [19170](#)

**Direct Outlook E-Mail Integration:**

**Use Outlook E-mail While in ACT!**

Use Outlook as your preferred e-mail client while you are working in ACT!. ACT! opens the Outlook new e-mail message form when you want to send an e-mail, send a letter in e-mail, conduct an e-mail mail merge, or send an e-mail by clicking on hyperlinks. You can send an e-mail to a Group or Company and the e-mail address will populate with all members of that Group or Company.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003. During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook.

Please refer to the following Knowledge Base Answer:

Title: How To Configure Microsoft Outlook as your E-mail Client in ACT! 2007  
Answer ID: [19172](#)

**Resolve E-mail Address and Create an ACT! History from Outlook:**

When sending e-mail from Outlook in which you want to create a History in ACT!, simply type in the e-mail address or select from the ACT! address books. ACT! will resolve any e-mail address in the To, CC, and BCC fields and attach a History entry to the ACT! contact with the matching e-mail address automatically. In previous version you could only create History when you selected ACT! contacts for the ACT! address book. Now you can use any address book and receive the benefits of this feature.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.

For more information on this topic please refer to the following Knowledge Base Answer:

Title: Understanding How History is Created Using Microsoft Outlook as Your Email Client in ACT!  
Answer ID: [19177](#)

**Specify Default History Types:**

Specify one of three default history types (subject line, subject line and message, and e-mail attachment) to record an ACT! History when sending e-mail from within Outlook. In previous versions you were required to select the history type for each new message.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.

For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Set the ACT! Default History Type in Microsoft Outlook  
Answer ID: [19178](#)

**Create ACT! Contact from Outlook E-mail:**

Create a new ACT! contact from an Outlook e-mail message. The Contact Name and E-mail Address fields are automatically populated and you can also populate up to 10 additional pre-defined fields such as Company, Address, and Phone Number to ensure a complete Contact Record. ACT! will check for duplicates before adding a contact. In previous version this feature was only available in the ACT! E-mail client when integrated with Outlook.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.

**Administration and Data Security:**

**Password Settings:**

Database Administrators can set password rules such as Password Expiration Options, Complexity of a Password, and Password Re-use to help protect valuable contact information from intruders. Password Settings include:

**Password Expiration Options:**

Define how long a password can be in use. Organizations can require their employees to change passwords after a set number of days. In addition, administrators can define which users' passwords never change or expire. For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Manage Password Expiration Settings  
Answer ID: [19179](#)

**Complexity of a Password:**

Determine the complexity of a password such as requiring uppercase, lower case, numeric, and special characters. Administrators can also determine the number of characters required for a valid password. For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Manage Password Complexity Settings  
Answer ID: [19180](#)

**Password Re-usage:**

Set password re-use rules. Administrators can set rules so a user will not be able to enter previously used passwords, or will be required to use a specified number of passwords before being allowed to re-using previous passwords. For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Manage Password Frequency Settings  
Answer ID: [19181](#)

**Secure Notes, History, and Opportunities en Masse:**

From the Contact Record change security access of notes, history, or opportunity entries en masse. You can select multiple notes, histories, or opportunities to quickly change all from public or private or visa versa. For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Change the Public/Private Status of Multiple Notes, History, or Opportunity Entries  
Answer ID: [19189](#)

**ACT! by Sage Premium for Workgroups 2007 (9.0) Additional Features:**

The following features are exclusive to ACT! Premium for Workgroups:

**User and Workgroup Productivity:**

**Automatic Outlook Calendar Synchronize:**

You can now automate your Outlook calendar synchronization. You can choose when and how often. Your database does not even need to be open. Calendars will remain in sync so you always have a pulse on important meetings and availability of your colleagues.

**Note:** Requires Microsoft Outlook 2000, 2002, or 2003.

For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Automatically Synchronize Your ACT! and Microsoft® Outlook Calendars  
Answer ID: [19184](#)

**Administration and Data Security:**

**Field Level Security:**

Field Level Security allows administrators to restrict access by user and teams to Full Access, Read-Only, or No Access for certain fields. As your organization grows, simply add users to a team and permissions are updated.

- **Full Access** - Allows users to read, write, and edit of data in those files. (default)
- **Read-Only Access** -Allows users to view data only. Blocks you from editing or deleting.
- **No Access** - Completely hide the field's contents. This can be used for fields related to personal or financial information such as addresses and credit card information.

**Note:** Only certain fields can be designated as read-only and no access.

For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Manage Field Level Security  
Answer ID: [19185](#)

**Automatic Database Maintenance:**

You can now set and manage database maintenance times. the ACT Scheduler allows you to perform automatic unattended database maintenance even when the database is not open. You can now automate when the database maintenance occurs. For more information on this topic please refer to the following Knowledge Base Answer:

Title: How to Manage Automatic Database Maintenance  
Answer ID: [19187](#)

**Improvements:**

The ACT! by Sage 2007 (9.0) release also corrects a number of issues, the following highlights some of the most significant::

**Define Fields/User Access/Field Access/Database Maintenance:**

- In some circumstances a Standard user was able to delete notes which the user did not own. Now Standard users can now only delete those notes which they are the Record Manager.
- Phone fields that are set to Allow Blank in the define fields property will be enforced now.
- Context sensitive lookups, accessed by right mouse clicking on a Yes/No field, include choices to lookup on that field.
- Removing old activities no longer causes errors and are removed based on entered settings.
- Defined environmental variables in the trigger of a field now run correctly when triggered.

**Importing/Exporting:**

- Error: "System.MemoryException" no longer occurs when importing either a text delimited file or ACT! database.

**Scheduler:**

- No longer need to close and reopen the ACT! Scheduler after deleting a task in order to add a new task.

**Email/Mail Merge:**

- E-mails no longer sit in the Outlook Outbox when using Outlook as your mail client in ACT E-mail.
- Images linked from a website now appear in e-mail mail merges.
- Template margins are maintained when mail merging more than one contact.
- Temporary files created during a mail merge are now deleted when merge is completed.

**Reports/Printing:**

- Reports that use the system date ranges fields such as Activity Range, Note Range, History Range, or Sales Range now use the computer's regional settings.
- Opportunity Pipeline and Graph reports now display the same results when run by a Standard User for all contacts.
- All Calendar and Address books format printing issues have been resolved.
- Field labels and field data now display when a Address Book is printed with additional fields selected.

**Synchronization:**

- Only Contacts that are members of a sync set now synchronize to the remote users.

**2006 Users:** This was addressed in the ACT! by Sage 2006 Hotfixes, please refer to the following Knowledge Base Answer:

Title: ACT! by Sage 2006 Hotfixes  
Answer ID: [18426](#)

- A restart is no longer needed for Network sync service changes to be reflected.
- ACT! is no longer required to be open when synchronizing attached e-mails from Microsoft Outlook.
- Under certain conditions involving attachments users would receive a "synchronization successful" message, but data was only transferred one way.

**2006 Users:** This was addressed in the ACT! by Sage 2006 Hotfixes, please refer to the following Knowledge Base Answer:

Title: ACT! by Sage 2006 Hotfixes  
Answer ID: [18426](#)

**Citrix:**

- Users can now attach a web page to ACT! contact in a Citrix environment.

**Handheld Links:**

- When using the Data Mapping option all fields are now available to synchronize with users handheld devices:  
ACT! Link for Palm OS® 2007  
ACT! Link for Pocket PC 2007  
ACT! for Palm OS 2.0®.

**2006 Users:** This was addressed in the ACT! by Sage 2006 Hotfixes, please refer to the following Knowledge Base Answer:

Title: ACT! by Sage 2006 Hotfixes  
Answer ID: [18426](#)

- Only the number of Notes and/or History entries designated in the **ACT! Link for Palm OS Configuration Setup** now synchronize to your handheld device. (This will require a Desktop Overwrites Handheld synchronization.)

**ACT! 2007 Handheld Links Installation / Setup Best Practices:**

When the term "handheld device" or "device" is used, it indicates that the behavior exists for both Palm OS and Pocket PC devices. This section provides best practices and notes regarding the use of the ACT! for Palm OS and ACT! for Pocket PC Links. For more information on installing the ACT! 2007 Handheld links please refer to the ACT! 2007 Start Here Guide or the following Knowledge Base Answers:

Title: How to Install ACT! Link for Palm OS® 2007  
Answer ID: [19260](#)

Title: How to Install ACT! Link for Pocket PC 2007  
Answer ID: [19301](#)

- If ACT! Link for Palm OS or ACT! Link for Pocket PC is installed, synchronize before installing ACT! 2007 as you will be required to uninstall the links and perform a DOH (desktop overwrite to the handheld).
- ACT! link software must be uninstalled before updating ACT! to prevent errors relating to incompatible versions of ACT!, the Link, and the database version.
- ACT! Link for Palm OS and ACT! for Palm OS cannot co-exist on the same computer.
- ACT! Link for Palm OS and ACT! Link for Pocket PC cannot co-exist on the same computer.
- The ACT! database must be upgraded to ACT! 2007 before you can install ACT handheld links.
- You cannot sync disabled databases to the device.
- A hard reset of your devices may result in the device no longer synchronizing to ACT!. It may be necessary to reinstall and reconfigure the ACT! linking software.
- You must perform a DOH synchronization if any of the following are true:
  - Device synchronization is disabled for a user.
  - The sync set has changed.
  - The you have not synchronized for more than 90 days.
  - The you have restores a backup copy or a new remote database.

#### Compatibility with Other Sage Products:

##### Accounting Link Users:

- To avoid reinstalling your Accounting Link product, install ACT! 2007 in the same location as your previous installation. To determine this location; search for **Act.exe** and note the path.
- If you are using an ACT! Accounting Link, you must upgrade your database to ACT! 2007 and then close and reopen ACT! before Accounting link information will be viewable.
- When using Accounting Link software you should not change the startup view preferences in ACT! to launch the Contact List view. The Contact Detail view must be the first view launched in order for the Accounting tab integration to load.

##### ACT! for Palm OS 2.0 Users:

If you are using ACT! for Palm OS 2.0, you must download a free in-line in order to remain compatible with ACT! 2007. This download can be found on [ACT! Downloads](#). For detailed information about installation, please refer to the following Knowledge Base Answer:

Title: How to Update ACT! for Palm OS® Version 2.0 to Version 2.0.1/2.0.2  
Answer ID: [19363](#)

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