act!™

Upgrading to Act! V22 from ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004)

Released 11/2019 for Act! V22 and Act! V22

Version: UA11_2019

Important Note

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

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

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Introduction

Act! helps organize all your prospect and customer details in one place so you can prioritize 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 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:

If your current version is...	Then...
I do not have any version of Act! installed. I am a "New User."	Use the Installing Act! for New Users guide to install, register, and activate Act!.
I have an Act! version other than ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) installed.	Use the *Upgrading to Act! v22 from ACT! versions 2005 (7.x) and Later* guide to upgrade to Act! V22.

The guides are available on the installation panel under Product Documentation. Adobe® Reader® is required to access and view product documentation.

About This Guide

This guide explains how to upgrade and convert your Act! database.

Act! 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 *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. You can browse the installation files directory for the guide as well. We recommend that you read the Web Administrator's Guide before installing the web version.

Features exclusive to Act! or Act! (Web) are noted in the guide. In most sections, we refer to all versions as Act!.

What You Should Know Before You Convert Your Database

Upgrading 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.

ⓘ Please note: You may need to make the intermediate step of upgrading your ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) database to a version such as Act! 2012 prior to upgrading to a later version. Download links: Act! 2012 Pro/Act! 2012 .

What Is Database Conversion and Which Type is Best?

Database conversion maps data from the fields in your current database to the fields in the new 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 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 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. Act! uses Microsoft$^{®}$ SQL Server$^{®}$ 2014 for the Act! database.

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, 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 database user, select the "Share Target Database" option during conversion. Additionally: If you plan to install Act!, 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 Act! (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 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 "Adding and Removing Fields, Images, Colors, and Tabs in Layouts" in 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)

Upgrade Checklist

The following checklist outlines the tasks needed to upgrade.

✓	Task	Page #
	Understand what happens during the upgrade process.	i
	Prepare the database for conversion.	1
	Prepare to install. **Important:** If your installation includes access via the web, be sure to complete both sets of steps.	2
	Install, register, and activate Act!.	3
	Convert the database. **Important:** Ensure you select the "Share Target Database" option.	5
	Convert supplemental files.	6
	Install Act! Sync Services.	8
	See the *Act! Web Administrator's Guide* to configure access via the web.	

Installing Act!

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

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

Required Components

To install and function correctly, Act! requires the following components:

- Windows® Installer
- .NET Framework
- Microsoft® SQL Server®

Check www.act.com/systreq or www.act.com/knowledgebase for required versions of the above.

If you do not have a required component or correct version of it, it is installed for you or you will be guided in obtaining it.

NOTE: You can choose not to install SQL Server Express locally if users will be connecting to a shared Act! database with SQL Server. However, 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. See the *Act! Web Administrator's Guide*.

Preparing a Database for Conversion

The following explains how to prepare a database for conversion.

Note: You can keep ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) on the same computer as the current version 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.

Prepare a database for conversion

1. Turn off screen savers and close all other applications.
2. If you have multiple databases with different time zones, set them to a "home" time zone. Time zone values are stored as Greenwich Mean Time (GMT) and not literal values.
3. 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.
4. If you have multiple users, make note of their user names and passwords.
5. Compress and re-index the database.
6. Remove old (obsolete) data.
7. 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 ActDiag.

 8. 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 Act! (Web), you must also complete the second set of 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.

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 installation.

6. Act! integrates with 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 Act!. You must have an Outlook profile configured for Outlook integration setup.

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. 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.

Installing Act!

IMPORTANT: If you are installing Act! (Web) in a <u>multiple-server</u> 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 Act!. You connect to the database from the web server.

Install Act! (all versions)

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! <u>without</u> 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 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. 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 "About the Trial Period" in Help.

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.**

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. It also contains information about integration with other applications available in Act!.

Converting a Database

Use the following steps to convert a database using Standard or Custom conversion.

Convert a database

1. Open Act!.
2. If the **Welcome** page appears, select **Open an existing Act! database**. Click **OK**. Or, on the toolbar, click **Open/Share Database**.
   a. In the **Open/Share Database** dialog box, click **Browse For Database**.
   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.

   > ℹ️ Please note: **ACT! 3.x–6.x Database (*.DBF)** will not be an option in Act! v20 and later and you must convert to an earlier version first. See '[What You Should Know Before You Convert Your Database](#)'.

   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. The options you see depend on the conversion type you select. Click **Next** to advance.

   Conversion options:

   - **Conversion types** - Select **Standard** conversion to use the default mapping or 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 Act! (Web), the database must be shared.
   - **Select active users** - Users converting their database to Act! 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 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).

Convert supplemental files

1. Open Act!.
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.

Featured Integrated Solutions

Act! emarketing. Segment contacts, create and send targeted email campaigns, and prioritize hot leads all from within Act!.

Marketplace. View additional services, some with trial periods or free levels, and links to integrated applications. On the left navigation bar, click Marketplace.

Microsoft Outlook and Office Integration. You can integrate with Microsoft Outlook, Word, and Excel. You can synchronize your Outlook contacts and calendar with Act!.

Google® and Gmail® Integration. You can integrate Act! with your Google contacts and calendar and record histories of emails sent or received from your Gmail account.

Next Step(s)

Single Users:

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

Act! (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 *Act! Web Administrator's Guide*.

Workgroup Users:

1. Read the *Quick Start for New Users* guide or watch Featured Videos accessed from the Help menu.

2. Create new remote databases for database synchronization. For more information, see "About Database Synchronization" in Help.

Installing Other Applications

This section explains how to install Act! Synchronization Services (available for Act! only).

Act! Synchronization Services

Act! offers two data synchronization services. These services let remote workgroup users, with their own Act! database, synchronize their data to the main workgroup database without Act! being opened and active. You can install one or both services depending on your needs. For more information about database synchronization, see Help.

Act! Network Synchronization Service. Lets you synchronize Act! 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 Act! or on another computer.

Act! Internet Synchronization Service. Lets you synchronize Act! 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: Act! users can synchronize data between a main and remote database, but do not use the synchronization services. For Act! database synchronization, the Act! application must be open on the computer hosting it. For more information, see "About Database Synchronization" in Help.

Installing Act! Synchronization Services

The following explains how to install an Act! Synchronization service. You install one service at a time. After installation, you must configure it.

IMPORTANT: If you install the Act! Internet Synchronization Service on a computer that does not have Act! installed, ensure the <computer name>\ASPNET account has read/write permissions on the Internet Sync install folder. For more information, see Help.

Install a Synchronization Service

1. Open the installation panel, double-click the **setup.exe** file, or insert the installation DVD.
2. On the installation panel, click **Install Act! Synchronization Services**.
3. Click the link to install a synchronization 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 Synchronization 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 Act!.