# Sage ACT! 2011 – Release Overview

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The Sage ACT! 2011 release is focused on a number of major improvements in Sage ACT! and includes Smart Tasks, Outlook® Contact and Calendar integration, Sage Business Info Services for ACT![[1]](#footnote-1)[[2]](#footnote-2) and much, much more. The following are product improvements, known issues and/or important notes for Sage ACT! Pro 2011 and Sage ACT! Premium 2011. This list is provided to improve your installation and overall use experience of Sage ACT! 2011. The issue numbers are internal tracking numbers and should be used when referencing issues to Sage employees. Please note, this document is provided to you as a Sage Certified Consultant or Sage Add-on Partner and must not be copied, reproduced, posted on your web site or distributed without express written permission from the Sage legal department.

## New Features & Product Improvements

This release addresses issues that users have requested in ACT! and introduces some new features. The following highlights a number of the most significant: Smart Tasks, Outlook® Integration for Contact and Calendar Synchronization, Welcome Page improvements, Importing improvements, Sage Business Info Services for ACT!, Security enhancements and Usability improvements.

**Features**

**Smart Tasks**

* The ability to create workflows in Sage ACT! that include the following:
  + Email, Activity, Delay and Sage E-marketing for ACT![[3]](#footnote-3) Steps
  + The ability to specify the criteria in the database that should exist before a Smart Task is execute for either Contacts or Opportunities
  + The ability to specify a time at which the Smart Task should execute
  + Manual execution of any Smart Task
  + Step definition that allows the designer to choose if the step is run in the foreground or background, dynamically select the contact(s) or opportunity(ies) in the steps, and run once capabilities
  + Sequencing step options so that steps can either trigger after the previous step is completed, or after a fixed time delay
  + The ability to design Smart Tasks for a database as an administrator and let other users consume the Smart Tasks.
  + Monitoring capabilities through the Smart Task Status view

**Outlook Integration**

* Contact Synching capabilities from Outlook to Sage ACT! and Sage ACT! to Outlook.
* Contact Sync set capabilities to allow users to select a sub-set of their Sage ACT! contacts to synch over to Outlook.
* Calendar synching that allows users to update both their Outlook and Sage ACT! Calendars and have them synch regardless of where events were created or modified.
* The ability to choose which systems alarms display in for events.
* An additional default activity type has been added called “appointment”. This is equivalent to the Outlook activity type when no contacts are invited to the event.
* Activity type synching options allow users to choose which activity types will synch. The defaults options are Appointments and Meetings.
* Scheduling synching options as frequently as one minute is available, but to limit performance impact, the suggested synching interval is 10 minutes.
* A new Outlook Integration synchronization panel from the Tools menu is available to set up both Contact and Calendar synchronization at once.

**Welcome Page**

* A redesigned offline Welcome Page is available for when users first launch the application but do not have a database open. The new page will allow for three options:
  + Create a database
  + Open a database
  + Watch a Napkin Mike video about what a database is
* A new in-product Welcome Page is also available. This new welcome page will highlight feature tour videos, as well as re-organize the links that were on the previous page in a more logical manner derived from User Testing.[[4]](#footnote-4)

**Importing**

Users now have the ability to import data directly from Excel® files.

* An express import option allows users to bypass the field mapping fields during the import wizard and make use of new field normalization and synonym mapping.
  + Note: the synonym mapping files can be customized and during normal installations are located here:
    - C:\Program Files\ACT\Act for Windows\CompanyFieldSynonyms.xml
    - C:\Program Files\ACT\Act for Windows\ContactFieldSynonyms.xml
* The ability to create new fields during the import process. If new fields are created during the import process, the layout designer will launch after the import so that the user can place the new fields on the layout for greater visibility.

**Sage Business Info Services for ACT!**

* Sage Business Info Services for ACT! provides business information on known companies and contacts within Sage ACT! or lets you download new company or contact records directly into ACT!.
* You first have to sign up for a Sage Connected Services Account by selecting the Sage E-marketing for ACT! or Sage Business Info Services for ACT! icons located in the top right hand side of Sage ACT!.
* Users can access business information from the Contact or Company Web Info tabs.

**Sage E-marketing for ACT!**

* Sage E-marketing for ACT! is replacing the name for the connected E-marketing service, formerly ACT! E-marketing. There is a new icon for the contact toolbar as well.
* Sage E-marketing for ACT! is integrated “out of the box” with Sage ACT! 2011 Smart Tasks (requires subscription to Sage E-marketing for ACT!).
* Email templates can now be launched as landing pages (web pages hosted by Swiftpage™).
* The service now has an Advanced Template Editor that can be used to edit imported templates.
* The template manager has been redesigned to help users manage, edit, publish/distribute, and launch landing pages easier.
* Swiftpage has added support for Microsoft PowerPoint®, Microsoft Excel®, and text files as documents that can be linked from an email template.
* Documents and images can be manages in a library format instead of uploaded individually for each template. The document library can store up to 100 documents, and the image library can store up to 500 images.
* The above changes will go live for existing ACT! E-marketing customers on 8/23/10 (except for the new name and icon, and Smart Task integration), and for all new Sage E-marketing for ACT! / Sage ACT! 2011 customers. When existing ACT! E-marketing customers upgrade to Sage ACT! 2011, they will then see the new name and icon and the Smart Task integration.

**Security**

* New options are available in the database to limit attachments. These options are restricted to administrators only:
  + Restrict emails from being attached to user records
  + Restrict email attachments to the database
  + Restrict file attachments to the database at all. This option will still allow users to attach shortcuts, but will restrict files to the database in general (Word, Notes, Histories, Activities, Mail Merge, Sage ACT! Email, etc)

**Installation**

A new option is available for installation that will allow users to install ACT! without installing Microsoft® SQL Server®. If a user chooses this option, (s)he will not be able to create or upgrade a database.

**Groups and Companies**

* A new warning dialog is available if users accidentally create a Group or Company. They can now cancel out of the action without having to create the Group/Company and then deleting it.

**Deleting Users**

* On the dialog to delete users in the database, the default option for action has been modified. In previous versions, the default action was to delete any contacts belonging to the user, now the default option is to reassign the records to another user.

**Dashboards**

* For the data chart control dashboard components introduced in ACT! by Sage 2010, the Contact names that display in these charts are now clickable. Users can click on the contact names to jump directly to the contact detail view for those contacts.

**Navigation**

* A “back” button has been introduced, allowing users to scroll back and forward between views in the application, much like a web browser control. Also included with this new feature is a drop down button to the left of the back button that will stack where the user has been in the application so the user can easily go back several views at once.[[5]](#footnote-5)
* Modifications to the global navigation bar on the top of the screen have been made to allow for more real estate for the back buttons. Changes include:
  + A consolidated button for Email which has a drop down button allowing users to write email, view email or jump to email preferences[[6]](#footnote-6).
  + A consolidated Search button that will allow users to access either lookups or the search on keywords feature.

**History Filterings**

* An option has been added to the history tabs on the detail views to filter histories in the view by history type.

## Fixed Issues for Sage ACT! Pro and Sage ACT! Premium (access via Windows®)

**Installation/Upgrade/Customization**

* In previous versions, ff a user changes a field attribute for any system fields that are bound to picklists (example: User removes the “state” picklist values from the “state” field, when they upgrade to ACT! by Sage 2010 SP1, those fields will be rebound to their initial default values. This issue has been fixed. (90419, 90426, 90427)
* For previous versions, if a user customizes the toolbar by deleting the layout selection control, ACT! created a one time fatal error. User can log back in after this one-time error message without issue. This issue has been resolved. (88562)
* In previous versions, any system fields in ACT! that has been modified prior to upgrade reverted back to their original names after upgrading. This issue has been resolved. (88233)

**Activities/Notes/Histories**

* In previous versions, after rescheduling an activity, the task list didn’t automatically refresh. This issue has been resolved. (84770)
* In previous versions, changing the “scheduled with” information to “My Record” removes all the existing contacts without warning. This issue has been resolved. (88291)
* Activities that were “scheduled with” another user’s contact record did not roll over in previous versions. This issue has been fixed. (74664)
* In previous versions, Activities that were scheduled for another user did not export. This issue has been resolved. (89466)
* When clearing multiple timeless activities at once, the histories were recorded with the time of 12:01 rather than the time the user was clearing them. This issue has been resolved. (90009)
* Using the drag and drop feature for activities on the mini-calendar changed the duration when activities were moved to an earlier date. This issue has been resolved. (90750)

**Companies and Groups**

* In previous versions, users could delete the Contact tab on the Company detail layout. This issues has been resolved. (90942)

**Contacts**

* In previous versions, when entering a new contact name in the contact detail view, if the user entered the first name and last name into the “Contact” field and then tabs out, the first name did not automatically populate the salutation field until the user saves the record. This issues has been resolved. (90388)
* In previous versions, if a user had the duplicate checking feature turned off when importing contact information, the Contact field did not successfully import. This issue has been resolved. (91061)
* If a user deleted spaces in phone numbers in previous versions, the numbers in the field would be deleted. This issue is fixed. (91599)
* When duplicating contacts in previous versions, the record manager did not change to the user who was performing the duplication. This issue has been fixed. (90486)

**Dashboards**

* On the administrative dashboard, the publisher database was listed on the grid component named “remote database information by user”. This could be confusing to users and was resolved. (87697)

**Importing and Exporting**

* Activities that have associations to Opportunities were losing their associations upon both import and export in previous versions. This issue has been fixed. (88017, 88117)

**Lookups**

* In previous versions, read-only fields could not be used in the Lookup by Example feature. This issue has been resolved. (92036)
* When performing a lookup on annual events in previous versions and using the criteria “Within Next (days)” that uses a number that goes into the next year, the lookup returned with no results. This issue has been resolved. (88386)
* When performing a lookup by example and trying to trigger on the Create Date field, that field was disabled in previous versions. This issue has been resolved. (90342)
* When performing a lookup using the “does not contain” operator, the lookup would not include values that were null in previous versions of the product. This issue has been fixed. (89553)

**Mail Merge**

* When using the Mail Merge feature with Microsoft Word 2007, the mail merge would take an extremely long time to process in previous versions. This is issue has been resolved. (90898)
* In previous versions, using email merge to an invalid email address would crash the mail merge operation altogether. This issue has been resolved. (90376)

**Microsoft Outlook Integration**

* In previous versions, when the Outlook integration service was unsuccessful in attaching emails to contacts in ACT!, it would continually attempt to try to do so. This issue has been resolved so that the applications stops attempting after 10 failed times. (90465)

**Opportunities**

* In previous versions, users were unable to delete an opportunity from the opportunity detail view. This issue has been resolved. (91361)
* In the last major version, the product name field could not be added to the Opportunity list view. This issue has been fixed. (91394)
* In the last major version, users were unable to change the security for multiple Opportunities at once. This issue has been fixed. (89373)
* When selecting an Opportunity from the Contact Detail view for a contact that has more than one Opportunity, the selected Opportunity is not always the one that appears in focus in previous versions of the product. This issue has been fixed. (91050)

**Reports**

* In previous versions, users were unable to add an picture field from Opportunities to a report. This issue has been resolved. (91356)
* In previous versions, if a user ran an Activity report to only show custom activity types, the report would be blank. This issue has been resolved. (90941)

**Other**

* In previous versions, when performing a synchronization with private history items attached to public contacts, the private history items were synched to the folder. The items do not show up on the contact record in ACT!, but if a user searches for them using Windows Desktop Search, they will show up. This issue has been resolved. (88233)

## Fixed Issues for Sage ACT! Premium (access via web)

**Activities/Notes/Histories**

* In previous versions, after attempting to insert a note, the user would see an error that said: “A script on this page is causing Internet Explorer to run slowly. If it continues to run, your computer may become unresponsive. Do you want to abort the script?: This issue has been resolved. (90433)
* When creating a follow-up activity, details were not transferred to the follow up activity in previous releases. This issue has been resolved. (90751)

**Dashboards**

* In previous versions, when users changed the process filter for Closed Sales to Date, the user would be logged out of the application. This issue has been fixed. (91387)

**Layouts**

* When users switched between layouts during a session to a specific layout and then logged out and logged back into the application, the last visible layout was not retained as the default in previous versions. This issue has been fixed. (91024)

**Lookups**

* When performing a lookup using the “does not contain” operator, the lookup would not include values that were null in previous versions of the product. This issue has been fixed. (91479)

**Mail Merge**

* When attempting to create a new letter or email template from the web client, users were unable to do so. This issue has been fixed. (91198)
* When writing a letter for the current contact in focus, the letter would default to being addressed to the previously focused contact in previous versions of the product. This issue has been resolved. (91483)

**Microsoft Outlook Integration**

* In previous versions, when the Outlook integration service was unsuccessful in attaching emails to contacts in ACT!, it would continually attempt to try to do so. This issue has been resolved so that the applications stops attempting after 10 failed times. (90464)
* After updating an ACT! Activity and sending an update using the “send invitation email” feature on the activity dialog, the system will display a message indicating that the item could not be saved because it has been changed by another user. This issue has been resolved. (89577)
* When deleting a single instance of a recurring activity in ACT!, that instance is not being deleted/removed from the Outlook Calendar in previous versions. This issue has been resolved. (90236)
* If a user is trying to attach Outlook messages to history records in ACT! that fail, ACT! will sometimes continue to attempt to attach the email indefinitely in previous versions. This issue has been fixed. (90464)

**Opportunities**

* After setting filters in the Opportunity list view and then leaving the view, the filter settings were not retained when users returned to the list view. This issue has been fixed. (88656)
* In previous releases, the “select users” button on the Opportunities tab of the contact Detail view did function. This issue has been resolved. (89279)

**Reports**

* After adding the “product name” field to a report, users would see an “Object Reference Error”. This issue has been fixed. (88691)

## Known Issues for Sage ACT! and Sage ACT! Premium (access via Windows)

This list encompasses the most frequently encountered items in Sage ACT! 2011. Unless otherwise indicated, these issues existed in previous Known Issue Documents. Any new issues added to the list or newly introduced in the release have been called out separately.

The formatting for known issues in the Sage ACT! 2011 release includes a description along with any identified workarounds or recommendations.

**New to Known Issues Document**

**Contacts**

* Fields that are mandatory in a contact record can be left blank when the contact is created from a Company record. (77078)

**Dashboards**

* Changing any of the filters on the “Contact History Count by History Type” dashboard component and then changing the filters for any other component on the dashboard in focus, the filters will reset for all of the components on the dashboard. (90729)

**Importing and Exporting**

* If a Contact, Group, Company or Opportunity has a note associated with it that also has another contact associated to it, after importing that note into another database, the edit date of the note is modified. (91156)
* When importing data into a new database, the “last email, meeting and reach” fields are not updated. (87944)

**Mail Merge**

* When performing a mail merge to a Microsoft Word document using Microsoft Word 2010, no history record is created for the record. (91968)
* If users have a merge field in their database followed by a carriage return and there is no data in the database for that field, the carriage return is ignored (91637)

**Smart Tasks**

* Deleting or changing an attachment to a Smart Task step after that Smart Task has been set to auto-run will result in no attachments being included in the Smart Task step. (93047)
* If a user has modified a Smart Task after setting it to Auto-Run, the user must disable auto-run and re-enable it affect the changes in any future running instances of the Smart Task (93066).

**Existing Known Issues**

**Install/Uninstall/Setup/Startup**

* If a user edits a layout within the first two minutes of opening Sage ACT!, Sage ACT! will switch between views and the layout designer 5 times. (85939)
  + **Workaround**: Wait for more than two minutes before editing layouts after opening Sage ACT!.
* If users install the Accounting Link for QuickBooks® 3.2.1 with ACT! 2010 while on the Welcome Page, they will not see the Accounting Link Tabs. (87166)
  + **Workaround**: In the preferences dialog, change the default start up view to Contact Detail before installing the accounting link.

**Activities/Notes/Histories**

* When adding a resource to an Activity in Sage ACT!, the activity is duplicated in the task list if the filter criteria for the task list is set to “all users”. (89128)

**Companies**

* In the Company detail view, if a user creates a company with divisions and then expands the tree view in the left navigation to show divisions and then switches the layout of the detail view to another layout, the expansion in the left navigation collapses. (87357)

**Contacts**

* The context menu for the Record Manager field does not contain the option to perform lookup using record manager as criteria. (79342)
  + **Workaround**: Use Lookup -> Other Fields, then select the Record Manager field in the Lookup Contacts dialog.

**Opportunities**

* For databases that are upgraded to ACT! 2010, when users first click on the add/edit product dialog in the Opportunity detail view on the product tab, currency fields will be displayed to the 8th decimal place. This issue can be resolved by modifying the field properties in define fields. This issue only appears on the product dialog. The product tab will default to 2 decimal places.  Note: This is only for upgraded databases, not new databases. (86707)
  + **Workaround**: In Define Fields, manually change the decimal place precision to the preferred setting.

**Outlook Integration/iCalendar**

* If a user uses the “send invitation email” feature on the ACT! Activity dialog to send an iCalendar object and then erases that same activity from their ACT! Calendar, a “send update” message will appear instead of a “send cancellation” message. (81754)
  + If a user changes the time of an activity from 10am to 3pm and then clicks the “send invitation email” box in the activity dialog, the iCalendar that is sent will not reflect the updated time. The user must manually change the time on the iCalendar before sending it.
  + **Workaround**: Cancel the first activity and recreate a new activity with the new activity details.

## Known Issues for Sage ACT! Premium (access via web)

This list encompasses the most frequently encountered items in Sage ACT! 2011. Unless otherwise indicated, these issues existed in previous Known Issue Documents. Any new issues added to the list or newly introduced in the release have been called out separately.

The formatting for known issues in the Sage ACT! 2011 release includes a description along with any identified workarounds or recommendations.

**New to Known Issues Document**

**Companies**

* When changing the default sort order of fields in the company list view and then closing the application and opening it again, the sort order will return to the default sort order in the company list view and not the modified sort order. (90266)

**Firefox**®

* When using Help in Firefox, Help will open in another tab in the browser rather than in a different window altogether. (89859)
* When pasting information from the clipboard into a note, history or activity detail, a second dialog will display. The user must paste the text in the second dialog, click “ok” and then it will appear in the note, history or activity detail. (90992)

**Sage Business Info Service for ACT!**

* ACT! Premium (access via web) users need to either have their web administrator add their account or the user needs to create their account through a Windows version of Sage ACT! 2011 attached to their ACT! db.
  + For complete steps, see Knowledge Base Article <http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26925>.

**Existing Known Issues**

**Contacts**

* Sage ACT! Premium (access via web) does not validate required fields on tabs that are not visible when the contact record is saved. (66844)
  + **Workaround**: Where possible, place required fields on the top portion of the contact record so that they are visible and they will validate appropriately.

**Mail Merge**

* When Microsoft Word is set as the word processing editor for Sage ACT! Premium (access via web), if a user opens the mail merge fields dialog to add fields to the mail merge template, the fields are not in alphabetical order. (86371)

**Outlook Integration/iCalendar**

* When updating the time on an ACT! activity and checking the “send invitation email” box on the activity dialog, the sender will get an updated iCalendar invitation, but the time still shows the original time for the activity. (88147)
  + **Workaround**: The sender must manually change the activity time and/or date inside the email message. The manually updated message does update the receiver’s existing Outlook Calendar.
* When cancelling an activity and checking the “send invitation email” box on the activity dialog, the sender will get an updated iCalendar invitation, not a cancel notification.
  + **Workaround**: The sender must manually indicate in the email that the meeting is cancelled so that the receiver can delete it from the calendar.

**Reports**

* When running reports from a server hosted in a 64bit environment, the reports run extremely slowly. This is a third-party issue. A KB has been created to help users understand how to rectify this issue. (88956)
  + KB 25823: Reports Run in ACT! Premium for Web Database Run Slowly When Hosted from a 64bit Server

1. **Important Note:** Import functions for Sage Business Info Services for ACT! must be performed on the web server when using Sage ACT! Premium (access via web). [↑](#footnote-ref-1)
2. Requires additional subscription. [↑](#footnote-ref-2)
3. **Important Note:** Sage E-marketing for ACT! is powered by Swiftpage™.  [↑](#footnote-ref-3)
4. The newly designed in-product Welcome page is not available in Sage ACT! Premium (access via web). [↑](#footnote-ref-4)
5. Note: This change is not available for Sage ACT! Premium (access via web). [↑](#footnote-ref-5)
6. Note: This change is not available for Sage ACT! Premium (access via web). [↑](#footnote-ref-6)