# Sage ACT! 2012 – Release Overview

NOTE: This document is considered confidential information as defined by your Sage Certified Consultant Agreement and/or your Sage Add-On Partner Agreement.

The Sage ACT! 2012 release is focused on a number of major improvements in Sage ACT! which includes Google® Contacts and Calendar integration, Gmail® integration, Sage ACT! Scratchpad, Universal Search and much, much more. The following are product improvements, known issues and/or important notes for Sage ACT! Pro 2012 and Sage ACT! Premium 2012. This list is provided to improve your installation and overall use experience of Sage ACT! 2012. 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 Sage ACT! and introduces some new features. The following highlights a number of the most significant: Google Contacts and Calendar integration and synchronization, Gmail integration, Sage ACT! Scratchpad, installation/getting started improvements, Search enhancements, improving Services discoverability, general Sage ACT! Premium (access via web) improvements, and usability enhancements.

**Features**

**Google Contacts, Calendar and Gmail Integration**

* Contact Synching capabilities from Google to Sage ACT! and Sage ACT! to Google.
* Contact Sync set capabilities to allow users to select a sub-set of their Sage ACT! contacts to synch over to Google.
* Calendar synching that allows users to update both their Google 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.
* Users can select whether they want Sage ACT! or Google to “win” for conflict resolution when both calendars have been changed.
* 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 Google Integration synchronization panel from the Tools menu is available to set up both Contact and Calendar synchronization at once.

**Sage ACT! Scratchpad**

* Provide Sage ACT! users with a virtual piece of paper on their desktop to do the following:
  + Quickly jot down notes, reminders, and to-dos in one simple user interface, with or without Sage ACT! running
  + Organize items in the list
  + Check-off or delete items
  + Print the list so you can take it with you
  + Add items as notes, history or activity in Sage ACT!
* Items from Sage ACT! Scratchpad will be sent to the Sage ACT! database that the user is currently logged in

**Universal Search**

Users now have the ability to find that key documents or piece of information they need in their contacts, groups, companies, opportunities, notes, history, and attachments, because search is faster and more expansive than ever.

* The ability to perform advanced search using operators
* Filter search criteria by all dates, last 24 hours, last week, and last month
* View search results displayed by relevance and double-click on the item of interest to be taken to that particular field or attachment.
* Users can also filter search results for secondary contacts and products

**Services Discoverability/Connections View**

* A new Connections view within the Sage ACT! application that helps users sign-up and learn more about Connected Services that could improve their bottom line and efficiencies in running their business.
* Users can manage their existing Connected Services through this view.

**Installation/Getting Started**

* For new customer installs, third party applications such as Microsoft® Office, Microsoft Outlook® and Internet Explorer® do not need to be closed before Sage ACT! installation. Users can now continue to be productive while Sage ACT! installation is progressing.
* Installation panel that provides prerequisites and average times to install before installation begins.
* Improved usability in opening and sharing databases
  + Shows all databases attached to the local SQL Server® instance and the most recently used databases in a dialog.
  + Users can also share databases from within this dialog – no need to find the buried menu.

**Import**

* Import logs are now available to give counts of successful records imported and details of what records failed.
* Import log is displayed at the final stage of import.
* Users can quickly get out of the import process (no need to confirm that they want to cancel an import process)

**Web Administration**

* Ability to manage critical administration tasks from Sage ACT! Premium (access via web) client.
  + Manage users
  + Manage teams
  + Lock/unlock a database
  + Manage password policy

**Product Enhancement Program**

Sage is committed to improving Sage ACT! application. To achieve the goal, we need to understand more on customer configuration and usage patterns of Sage ACT!. Product Enhancement Program is a mechanism, behind the scenes, that allows for better prioritization of feature deficiencies and monitor progress against those metrics. It also allows for better way to determine what problems may be occurring within the field and pinpoint problems with more accuracy and efficiency.

* Collect Sage ACT! users’ environment information
* Users have the ability to opt-in/opt-out of sending their machine and Sage ACT! usage data to Sage
* Users have the ability to change their decision to send or not send their machine and Sage ACT! usage data to Sage at anytime.

**Smart Tasks**

* Users now have the option to apply criteria when manually running Smart Tasks

**General**

* Sage ACT! Premium (access via web) users have the ability to copy/cut and paste the serial number from a fulfillment email to the serial number dialog in Sage ACT!.

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

This list encompasses the high severity and the most frequently encountered items in the previous release.

**Synchronization – Remote Databases**

* In previous versions, changing fields to a different drop down field list does not sync to remote databases. This issue has now been resolved. (96072)
* In previous versions, updates on the parent database do not get synchronized to remote if both sides modify the same contact. Original data on the remote replaces the changes on the parent. This issue is now resolved. (95047)
* The changes made in the document attached to a contact in the remote database are not synchronized to the document on the parent database. After editing and syncing to parent, a guid is added to the file and updated properly on the rdb. On the parent, the document is still linked to the original file name. On remote, the document is linked to the edited attachment. This issue is resolved. (94280)
* Outlook contacts are removed from the remote database after syncing to parent. Issue is now fixed (94279)
* Resolved the issue of not being able to change settings on multiple remote databases. (94559)

**Outlook Integration**

* There was an issue where Contact and Calendar sync were failing with the following combination of conditions: UAC turned ON, sync is run from the Sage ACT! menu or sync is run from the Sage Integration menu, and both Outlook and Sage Integration are run as/by a Windows Standard user. This issue has now been resolved. In other user privilege combinations and if a failure occurs, the proper messaging guiding users on how to resolve the issue is displayed. (95377)
* The issue where Outlook add-in for Sage ACT! displays a runtime error during loading when upgrading to Sage ACT! 2011 SP1, is now resolved. (94459)
* Performance degradation when loading task list after sending an email using Outlook. Specific to Windows 7 and Office 2007 environments. Issue has been resolved. (94241)
* In Terminal Services environment, Act.Outlook.Sync.exe errors display when logging in with multiple users. Multiple users can now log on to the same machine and sync Sage ACT! and Outlook simultaneously. (94384)
* When attempting to send an email to two separate distribution lists on the same email, the email will not attach back into Sage ACT!. Issue has been resolved. (94026)

**Contacts/Companies**

* Issue of not being able to continue using Sage ACT! without saving company name has been resolved. (95260)
* Salutation field is deleted when users have set a preference to not fill the salutation field. Issue has been fixed. (94759)
* Error while editing data in Company list view while in customize columns mode. Issue has been fixed. (95260)
* 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)
* Company name is right justified after performing a lookup. Issue is now resolved. (92583)

**Import/Export**

* If contact with several names is not mapped in the multiple contact name dialog, nothing is imported into the database. Issue has been fixed. (96098)
* Contacts of Opportunities are not exported when export from one database to another database. Issue has been fixed. (94098)
* Import from Microsoft Excel® showing incorrect date format. Issue has been resolved. (95198)

**Security**

* Emails sent to other users incorrectly adds the file to the attachment supplemental files folder. Issue has been resolved. (94840)

**Lookups**

* No response after clicking Go to Advanced Query link on Lookup Opportunities view. Issue has been fixed. (94605)
* Record Manager listed as Manager when doing lookups. Issue has been fixed. (94611)

**Copy Database/Save As/New**

* The issue of not being to delete users in empty copy databases after applying Sage ACT! 2011 SP1 has now been resolved. (94408)
* The issue of not being able to change default duplicate checking criteria in empty copy database after applying Sage ACT! 2011 SP1 is now resolved. (94407)
* Teams created when setting team level security in empty copy database. (95236)

**Reports**

* Gross Margin by Product calculated total cost incorrectly. Issue has been fixed. (96124)
* Opportunity by Product does not display correct information. Issue has been fixed. (95825)
* Issue of Group reports coming up blank when all sub groups are selected for selected groups is now resolved. (94128)

**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. Issue has been resolved. (94008)

**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)

**Restore**

* Database Restore does note restore custom layout. (96218)
  + Workaround: Use Restore As function instead of Restore.

**ACT! Email**

* Attaching emails to contact history is not working from ACT! Email. History recording to Groups or Companies does not work as well for emails from ACT! Email. (96126)

**Other**

* Error message displays when users select “Add Permissions” link in Manage Users dialog. The link now opens correctly without error message. (95530).
* Sage ACT! Office Add-in disables Quick Print function in Microsoft Word 2007/2010 after applying Sage ACT! 2011 SP1 update. Issue has been resolved. (94762)
* Company Web Info tab links are not refreshed with current entity data if Web Site field has never contained data. Issue has been resolved. (94491)
* Information on relationship between two contacts is not saved when using the Relationship hyperlink. Issue is now fixed. (95822)
* When printing calendars using Quick Print, data from days other than those showing on the screen are printing. (94034)
* When using the Facebook® and Google® links in Internet Explorer® 8, information will not display in the web info tab because of changes made by these sites to not display in frames. Issue has been resolved. (94008)
* OLEDB Provider – Ambiguous Column Name when querying table with spill-over tables. (95186)
* Alarms – Snoozing alarms causes error: Index was outside the bounds of the array. (95070)
* Follow up activities not marked private even though the preference of "Make new activities public" is unchecked. Issue is now resolved. (95080)
* 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)
  + This behavior is intentional; therefore we do not have plans to turn off background loading at this time.
  + **Workaround**: Wait for more than two minutes before editing layouts after opening Sage ACT!.
* When performing a mail merge to a Microsoft® Word document using Microsoft Word 2010, no history record is created for the record. (91968)

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

This list encompasses the high severity and the most frequently encountered items in the previous release.

**Installation/Uninstall**

* Syncconfigfile.xml not copied during install resulting in not being able to set up Internet Sync. Issue has now been resolved. (95962)

**Contacts/Companies**

* Contact Detail view is blank after selecting contacts from the contact lookup list, and when users navigate to other views, they are logged out of the database. Issue has been resolved (94959)
* Clicking on an email address in contact list gives a 404 error. Issue has been fixed. (95348)
* When Customizing Columns in Contact List view, the dialog is in a distorted view that displays only the Available Fields. Issue is not resolved. (94527)

**Activities**

* Resolved the issue of not being able to sort activities by date or time from Web client when start time is after 5 pm. (95058)

**Outlook Integration**

* Outlook displays error about missing dlls when loading Outlook integration. Outlook integration is now loaded without errors. (94842)
* Sage ACT! address book is not listed as an available address book in Outlook for Outlook integration. Issue is now resolved. (94180)
* 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.
  + Microsoft currently has no plans to refresh the cache more often or provide a mechanism for Sage ACT! to refresh their cache due to performance.
* Act.Outlook.Sync.exe errors when logging in with multiple users in Terminal Services. Issue has been resolved. (94384)

**Preferences**

* Fixed the issue of not being able to change record creation options from Web client. (94557)

**Opportunities**

* Custom date ranges on opportunity list filters does not return any results/data. Issue has been fixed. (95438)

**Lookups/Keyword Search**

* Sorting on results of contact column after performing keyword search does not sort in any logical order. Issue is now resolved. (95185)
* Lookup Keyword Search does not find all records, specifically is searching the Current Lookup. Issue has now been resolved. (95134)

**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. Issue has been resolved. (86371)
* Mail merge to Microsoft Word and print does not record history. Issue has been resolved. (89846)

**Firefox**

* Unable to perform advanced queries from Firefox®. Issue has been resolved. (94382)

**Login**

* User logs in and in a varying time from 5 mins to 20 min the user will start getting the "Continue to stay logged in" pop up, then the user received sequential popups every 1,2, or 5 mins asking them to click continue. Issue has now been resolved. (93979)

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

This list encompasses the most frequently encountered items in Sage ACT! 2012. 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! 2012 release includes a description along with any identified workarounds or recommendations.

**New to Known Issues Document**

**Outlook Integration – Activity Sync**

* The end date of recurrence an ACT! activity is changed in Outlook after Sync (96477)

**Universal Search**

* Dates and times for items in Sage ACT! 2012 is based on Universal Time or Greenwich Mean Time (UTC GMT), so often a result for one day in one time zone is found on a different day due to this. Depending on which time zone you are located at, searching on a specific date and time may not return results expected.

**Lookups/Advanced Query**

* Adding two annual event fields to advanced query criteria causes no results to be returned (94934)
  + Workaround: Query for only one annual event, and then sort the results by the other annual event field clicking on the column or select Edit>Sort.
  + KB article will be created.

**Connections View**

* Sync Now on Sage ACT! Connect fails when launching from Connections View on Windows 7. (96713)
  + Workaround: Sync by selecting the system tray icon. Right click and choose Sync>All Users or a specific user

**Backup**

* Some users are not able to back-up their ACT! databases. Several have reported seeing the following error dialog: "Cannot insert duplicate key row in object 'sys.syscommittab' with unique index 'si\_xdes\_id’. (96780)
  + 3rd party issue with Microsoft SQL Server R2. Microsoft acknowledges bug with SQL Server 2008 R2, and indicates they have prevented this problem from occurring in Microsoft SQL Server R2 SP1.
  + If this error is received, tech support or the user can run a batch script created by Sage ACT! R&D team to delete duplicate rows from the sys.syscommittab (not an ACT! database table).

**Existing Known Issues**

**Install/Uninstall/Setup/Startup**

* If users install the Accounting Link for QuickBooks® 3.2.1 with ACT! by Sage 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.

**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. This is only an issue for databases created in ACT! by Sage 2009.
  + **KB article** created to indicate the workaround mentioned above.

**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.
  + **KB article 27495** has been created. This is a third party limitation – Sage does not have control over changing this message in Outlook.
* Microsoft Outlook freezes when dismissing reminder with ACT! address book and AVG Internet Security (95677)
  + This is a third party limitation with AVG Internet Security. KB article will be created for this.

**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)
* Contacts are not associated with exported opportunities. (93093)

**Mail Merge**

* 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**

* 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).

**Other**

* Repeatedly minimizing/maximizing Terminal Service/RDP Window causes GDI error and Red X on toolbar. (93917)
  + Initial testing reveals that this has been addressed. Further verification will be performed to confirm this issue has been resolved.

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

This list encompasses the most frequently encountered items in Sage ACT! 2012. 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! 2012 release includes a description along with any identified workarounds or recommendations.

**New to Known Issues Document**

**Sage ACT! Scratchpad**

* Unable to make preference changes in Scratchpad. (96215)
  + Third party limitation with Microsoft IIS. ACT! team will continue to circle back with Microsoft at least quarterly.
  + Workaround: Reset IIS or recycle the application pool.
* Sage ACT! Scratchpad (Web) user interface cannot be launched from Sage ACT! Tools menu.
  + Workaround: Launch Sage ACT! Scratchpad from the desktop shortcut/icon.

**Outlook/Google Integration**

* After adding an Outlook address book on Sage ACT! Web client, users need to reset IIS on the server. (90546)
  + Message dialog provided to users to reset IIS on the Web server. This is determined to be a third party (Microsoft) limitation, and ACT! team will continue to circle back with Microsoft at least quarterly.
  + Workaround: Recycle the application pool.
* On the initial download and install of Google sync service, before users can complete Google integration setup and have integration tools and menus available in Sage ACT!, IIS must be reset/restarted on the Web server. (95205)
  + Message dialog provided to users to reset IIS on the Web server. This is determined to be a third party (Microsoft) limitation, and ACT! team will continue to circle back with Microsoft at least quarterly.
  + Workaround: Recycle the application pool.
* Sage Integration service not able to connect to a Sage ACT! database when AVG Internet Security is installed (web client only) (96329)
  + This is a third party limitation with AVG Internet Security. KB article will be created for this.

**Web Info Tab**

* Google News Search link Page cannot be opened or displayed correctly within Web Info tab (96271)
  + **Workaround:** Click on the “Open in separate browser window” link to open the Google News Search in a browser.

**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.

**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.
  + Microsoft currently has no plans to refresh the cache more often or provide a mechanism for Sage to refresh their cache due to performance.
* 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 64-bit 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 64-bit Server

**Firefox**®

* 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!\***

* Sage 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 Sage ACT! database.
  + For complete steps, see Knowledge Base Article <http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26925>.

\*Requires additional subscription

Note: Microsoft SQL Server, Windows Vista and the Windows logo are either registered trademarks or trademarks of the Microsoft Corporation group of companies in the United States and/or in other countries.