



ACT! by Sage Premium for Web 2009 (11.0) – Release Overview (Final Release Version)

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ACT! Premium for Web 2009 (11.0) is a new release of the ACT! Premium for Web product and is called out in the document as APFW. The 11.0 release is focused on new features, usability improvements and important in-market issues. The following are product improvements, known issues and/or important notes on this release. This list is provided to improve your installation and overall use experience of ACT! Premium for Web (11.0). The issue numbers are internal tracking numbers and should be used when referencing issues to Sage Software employees. Please note, this document is provided to you as an ACT! Certified Consultant or ACT! Add-on Partner and must not be copied, reproduced, posted on your web site or distributed without express written permission from the Sage Software legal department.

1 New Features & Product Improvements

New and improved features in the 2009 Product Family are focused in the areas of **User Productivity** and **Improving Usability** in Top Task Areas as well as further **Automating and Simplifying Administration**.

Ease of use – Microsoft® Outlook® Integration: E-Mail

ACT! integration with Outlook Rules

You now have the option to use Outlook Rules, combining all the flexibility of Outlook Rules with a custom action to record e-mail messages in ACT!. This “power user” feature enables you to manage e-mail messages received in your Inbox automatically, based on the criteria you set in Outlook Rules.

Change the ACT! database on-the-fly

Outlook integration users can now change the ACT! database on-the-fly when they create ACT! contacts from an e-mail message or when they attach e-mail messages to ACT! contacts. This gives users additional flexibility by changing databases that will be used.

Change the ACT! history option on-the-fly

Outlook integration users can now select the ACT! history option they want recorded for Outlook e-mail messages to ACT! contacts, quickly and easily, directly from the ACT! history type drop down in the Outlook new e-mail message window. This allows users the flexibility to record the entire message back into ACT! for some messages, and decide not to record history at all for other messages.

Quick Attach

Quickly select any number of e-mail messages and easily attach them to contacts in your default ACT! database. Messages are automatically matched to contacts on the e-mail and attached as history items in the default ACT! database.



Ease of use – E-Mail

E-mail addresses are displayed as hyperlinks within the Notes preview pane so when you click on the e-mail address, a “send e-mail message” window opens with the e-mail address automatically populated in the “to” field, making it convenient for you to communicate.

Ease of use and User productivity – Search Capabilities

Lookup Improvements

ACT! Lookups have been streamlined to better meet your search needs, enabling you to quickly find data of interest. The Lookup dialog has not only been simplified, it has been enhanced with powerful search capability:

- Lookups are based on additional search operators enabling you to find what you are searching for based on only part of the name or title. For example, when searching for contacts with manager in the title, you can simply search on the word “manager” and find all titles with that word such as sales managers, IT managers, and so on.
- You have the option to switch entities like Contact, Group, and Company, giving you the flexibility to modify your search without having to start the Lookup from scratch.
- Access to the Advanced Queries option is located in the main Lookup screen. The last lookup you performed will carry over so you can define your search even further without having to exit your current lookup

Lookup Previous

Quickly view your most recent Contact lookups with the redesigned “Lookup Previous” option containing the last several lookups you conducted. These lookups are categorized by: the lookup type, a time-stamp, and how many contacts were found by the lookup. Next time you are multi-tasking, you can get back to the Contact lookup previously conducted with ease.

Ease of use and User Productivity – Calendar Management and Calendar Printing

Create an ACT! activity from an Outlook e-mail message

Easily schedule ACT! activities from Outlook e-mail messages when you receive an e-mail requiring any type of action, like a follow-up meeting or task, so you can stay on top of your responsibilities and maintain valuable information in ACT.

View Activities for Teams Larger than 10

View the activities of all your team members, even if the team is larger than 10, to better understand the level of activity and types of activities your team has scheduled.

Calendar Filters Applied on Printouts

Filter your calendar and then have those settings retained when printing your calendar. All filters are retained including type, priority, date range, and users. This eliminates the need to re-set your print filters to match your ACT! calendar filters.

Contact Names on Monthly Printouts

Easily see who is included in your upcoming meetings by viewing the contact names associated with any activity you have scheduled in ACT!, right there on your monthly calendar printouts.

2 Fixed Issues

The following are fixed issues in the ACT! Premium for Web 2009 (11.0) final release.

Outlook E-mail Integration

- Attachments included in saved history e-mails can now be launched inside APFW web client (77893).

Contacts

- List views can now display country codes on phone fields according to the preference setting for 'Always display country code in phone fields' (58423).
- In 10.0.2, a defect was found that caused new information to be cleared from the 'User Fields' tab when the user clicked on the tab name after entering information in one of the user fields. This defect has been fixed (77806).
- 'Last' fields (last reach, last meeting, last e-mail, last letter) are updated automatically, not after logging out of APFW and logging back in (77894).

Dashboard

- Filtering on opportunity stages in the 'Opportunities by User' component when stage names were duplicated on multiple opportunity processes caused a database error. This defect has been fixed (78411).
- Initial user filter setting in the default dashboard is set to the logged-in user instead of all users (70921).

Lookups

- Advanced queries on fields with an '&' in the field name (field label) now function properly (73545).

Reports

- The total number of the opportunities shown on the 'Opportunity by Company' report counts opportunities multiple times when they are with more than one contact. This issue is now fixed (68246).

Other

- International keyboard shortcuts ("hotkeys") for the '@' and '€' symbols are supported.

3 Known Issues

This list encompasses the most frequently encountered items in the ACT! Premium for Web 2009 (11.0) final release version.

The known issues include a description along with any identified workarounds or recommendations.

Activities

- Changing the date and/or time of an activity from the 'General' tab of a recurring activity will not properly change all occurrences. The recurrence pattern must be changed from the 'Recurrence' tab of the activity (using "edit" from the Contact > Activities tab) (78299).
 - Work around: changes to a recurring activity should be made on the 'recurrence' tab, not the general tab.

Contacts

- APFW 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.

Dashboard

- The first load of a dashboard view takes longer to display in comparison to other views (68211).

Lookups – Keyword Search

- Performing a keyword search on group entities may not find all occurrences of a keyword (78523).

Outlook Integration – E-mail

- *This item is new.* The Create Activity in ACT! dialog does not pre-populate with activity preferences for activity duration, priority, and alarm (78804).
 - **Workaround:** The user can modify the settings in the Schedule Activity dialog accordingly.
- *This item is new.* Outlook 2002 users will encounter the following warning message from Outlook when the Schedule Activity from E-mail function is invoked: "A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?" (78793).
 - **Workaround:** Click OK on the warning to allow the Schedule Activity dialog to open and function correctly.
- *This item is new.* NOTE: Outlook Rules set for outgoing mail will not attach e-mails as history items in ACT!; users should use history options to record outgoing mail in Outlook rather than Outlook Rules (79176).
- *This item is new.* The Schedule Activity dialog will not launch from the Tools menu of an email toolbar in Outlook 2003 (79306).
 - **Workaround:** use the 'Schedule Activity in ACT! Premium for Web' icon in the Outlook toolbar with the appropriate e-mail highlighted in the inbox or other Outlook folder.

Outlook Integration – Uninstall

- *This item is new.* If a user uninstalls the APFW Outlook Integration module, the next time Outlook is started the following error message will appear: "The ACT! Premium for Web address book service cannot be accessed. Do you want to reconfigure it now?" In addition, any rules created with ACT! address books or ACT! custom actions will still be present in Outlook (78149).
 - **Workaround:** The user can modify Outlook settings to remove the ACT! address books and any previously configured Outlook rules.

Templates

- E-mail templates with graphics lose their formatting when the template is merged into e-mail (Write | Other Document (from template...) followed by 'File | Send E-mail') (74991).
 - **Workaround:** reset the formatting in the e-mail preview pane, before sending.

4 Compatibility

ACT! Premium for Web 2009 (11.0) has expanded support for internet browsers.

Safari™ browser for Mac® OS

- ACT! Premium for Web 2009 (11.0) supports the Safari 3.0 (or higher) web browser platform for Mac. The following features are NOT supported in the current release:
 - Outlook integration
 - ACT! Word Processor functionality
 - Mail Merge functionality

Known Issues with Safari browser functionality in the 11.0 release:

- Some filter dropdowns do not redraw correctly when filters are changed and the user leaves the filter dropdown and then returns to it (78443).
 - Workaround: Change to another view and then return if you want to modify the filter settings a second time.
- In the Opportunity dialog, when products or services are added via the 'Add Products/Services' dialog, the cost and price fields will be set to \$0.00 instead of their default values (79253).
 - Workaround: enter the product/service and the corresponding price and cost manually.
- Using the Opportunity dialog, if you edit the quantity, cost, price, adj. price, or discount fields (on the Products/Services tab), the new subtotal will not be immediately visible (79254).
 - Workaround: click on one of the other opportunity detail tabs or close and reopen the opportunity dialog box to "refresh" the sub-total after making changes to any of the fields listed above.
- When editing the Products/Services tab from the Opportunity dialog, if you want to enter a new line item or edit an existing one, you must first click on another tab and then return to the Products/Services tab (79255).
 - Workaround: close the 'Edit Products/Services' dialog, click on one of the other opportunity tabs (User Fields, Details, or Opportunity Info), and then go back to the Products/Services tab to do additional edits.