



## ACT! Tips & Tricks

1. [Troubleshooting Outlook History Recording in Sage ACT!](#)
2. [Deleting old Histories for multiple Contacts in Sage ACT!](#)
3. [Supporting Remote Users with Sage ACT!](#)
4. [How to automatically backup your ACT! database](#)

## "ACT! Now" News

### [Sage ACT! 2013 is coming soon](#)

The official release date of Sage ACT! 2013 is September 10th, and the people who attended our recent Road Show got a taste of what's coming. If you were unable to attend, the new feature list was broken down into four categories:

**1. Social Media Integration:** ACT! 2013 will feature a new "Social Media" tab that will collect and display the last 25 posts from a contact on Twitter, Facebook, and LinkedIn. It will provide an instant snapshot of what personal or professional subjects your contacts are focussed on. Imagine knowing a contact's daughter is graduating, or if this contact just received a promotion before you call them? More than just an icebreaker, sometimes you'll gather information that will provide vital sales opportunities like learning about a company acquisition.

**2. Ease of installation & migration:** Many features have been built into this edition to make

## Preferred Add-ons

***Handheld Contact:*** The best solution for synching ACT! data with Handheld device, be it a Blackberry, iPhone, iPad, Windows Mobile, or Android device. The closest "ACT! experience" available on mobile devices.

***QuoteWerks:*** Deliver professional quotes to your ACT! contacts, and then seamlessly export the transactions to Quickbooks when the deal is done.

***Exponencial's Advanced Layout Tools - General Pack:*** Offers 14 different controls to enhance your layouts. Buttons to launch a program, an ACT! menu item, open a document, field which calculates an age automatically or show the next activity scheduled, tabs and groupbox to conveniently layout your fields, etc.

***OakMerge:*** ACT! natively supports importing from many sources, but OakMerge improves the reliability and flexibility of this process dramatically. It's the only import process we use at Keystroke for customer files.

## Don't be shy...

### **"5-MINUTES & IT'S FREE"**

Many ACT! users limit their enjoyment of the program because they're fearful of contacting an ACT! Consultant and incurring huge bills.

The truth is we have a 5-minute policy that says if we can give advise or provide a quick fix to some issue, there is no charge for the

upgrading easier than ever before. Sage has focussed on what they've termed "call generators", and worked hard to improve, speed up, and simplify the upgrade process. Moving databases to new computers has now been made a "wizard", so you won't need to call your overpaid, and frequently over fed ACT! consultant.

### 3. ACT! Premium Mobile will feature

**Opportunities:** Since April 19th, ACT! 2012 Premium for Web has feature HTML5 publishing that allowed you to see your "live" ACT! data in HTML5 on your iPhone, iPad, Android, or Playbook device. This expanded the capability of ACT! dramatically, and now they've taken it a step further with ACT! 2013. Not just limited to your calendar and Address book, now you can create, open, and manage all your vital sales opportunity data on the road from your mobile device.

**4. Smarter Smart Tasks:** Since the release of ACT! 2011, customers have wanted Smart Tasks to include "server" capabilities and to be able to update field data. Over the last two years of supporting Smart Tasks, I can report the number #1 complaint has been Smart Tasks won't run if the ACT! program is closed or if the computer is turned off. Now Smart Tasks are "server based", which means they can run from the server without ACT! open, AND they can update fields. An example might be if all contacts from a certain district automatically get assigned to a specific sales rep, and then get included in their synched database.

The final reasons to upgrade I have not included in the Top 4 because they apply every year, and those are general bug fixes and compatibility. Sage ACT! works within a Windows, Office, and browser environment, and to ensure ongoing compatibility with these elements you have to keep your program current. Sound unfair? Well it shouldn't, because no annually released software product ensures "future compatibility" with unreleased software or editions. It's impossible. And with Windows 8 and Internet Explorer 10 scheduled to be released this fall, this issue is not theory, it is imminent.

Many times the timing and severity of a bug will determine how a bug gets fixed. Some times "when" the bug surfaces during the release cycle will dictate whether a bug will be addressed in either a Service Pack/Hot Fix, or the repair will be rolled into the next release. Smart Tasks, for instance, were significantly improved in their reliability from ACT! 2011 to ACT! 2012.

**Sage ACT! 2013 is available for "Pre-Order" at 25% of SRP in our shopping cart until August 15th. You'll receive your receipt immediately, but your credit card will NOT be charged before August 15th. Product is expected to available on September 10th.**

### **ACT PREMIUM MOBILE**

A free way to access your ACT! data on your Tablet or Smart Phone. On April 19th, Sage released Service Pack 2 for ACT! for Web, which provided the ability to publish your database in HTML5 format for your Tablet or Smart Phone.

service.

Now 5-minutes may not seem like a big offer until you learn most of us provide such free remote sessions 5-8 times a day, and get our customers up and running without further delay.

What's more, a quick bit of free advise can help stop a customer from embarking on a bad deployment strategy that could truly be costly to repair.

### **WHAT TO DO AFTER YOU'VE PURCHASED SAGE ACT!**

Many people are confused about the process following the purchase of their Sage ACT! software. Questions arise over whether they get installation discs, where they download the software from, when can they expect their license key, and what support they're entitled to.

At Keystroke, we encounter these questions so often we've dedicated a page on our new site, along with an instructional video, on what to expect after you purchase your Sage ACT! software.

Check it out, and let us know what you think: <http://www.keystroke.ca/default.asp?plD=135>

### **ACT! PUBLIC CLASSES**

The Keystroke public full-day training sessions have been such a success this year, we've now dedicated a place on our homepage at [www.keystroke.ca](http://www.keystroke.ca) to display the training schedule and provide instant access to registration.

The repeated sell-out responses and 100% positive feedback have been an overwhelming endorsement of these classes effectiveness. Keystroke is the only company in Canada to offer monthly public classes, with End-User classes run monthly and Administrator classes quarterly.

As ACT! Premier Trainers we are employing Sage's training curriculum for end users and Administrators.

### **NEXT CLASS?**

- July 16th - End User
- July 18th - Administrator
- August 28th - End User

[REGISTER FOR CLASS](#)

### **KEYSTROKE QUALITY COMPUTING**

- *Top Five in North America ACT! Sales*
- *#1 in English Canada*

This HTML5 technology provides application like functionality through your mobile device's browser, and gives you direct, live access to your crucial ACT! data. No synching is required because you're accessing your live data. Test it for yourself at the following link. Login in as "Chris Huffman" without a password.  
<http://act4.keystroke.ca/apfw/m>

- *Member of the Sage ACT! Advisory Council (BPAC)*
- *ACT! Premier Trainer*
- *Four Full-Time ACT! Consultants*
- *ACT! Database Hosting Services*

phone:  
(416)499-3090

email:  
[ken@keystroke.ca](mailto:ken@keystroke.ca)

come on by:  
500 Gordon Baker Road Toronto, Ontario M2H  
3B4