



ACT! Tips & Tricks

1. [Configuring ACTReader Password](#) (Geek Alert!)
2. [How to copy Contact Details to the clipboard](#)
3. [Sending ACT! Reports directly to Excel](#)
4. [Connecting with ACTReader](#) (Geek Alert!)

Preferred Add-ons

[Topline Designer](#)

Expand the functionality of ACT! with custom tables for tracking customer service, support, projects, manufacturing and more. TopLine Designer allows you to add custom tabs at the contact, company, group or opportunity level - quickly customizing ACT! with specific industry and management solutions.

TopLine Designer includes templates for industries such as real estate, healthcare and financial management along with general management solutions such as contracts, equipment and event planning.

"ACT! Now" News

[Sage ACT! 2013 is here!](#)

The official release date of Sage ACT! 2013 occurred on September 5th, and if you pre-ordered your software or renewed your Business Care, you should be receiving your licensing information soon. The download link for ACT! 2013 Pro, Premium, and Web is as follows:

<http://keystroke.ca/default.asp?pid=173>

On account of this upcoming release, we've added several new pages to our website that we think will be helpful:

- [What's new Sage ACT! 2013](#)
- [Sage ACT! Pro vs. Premium](#)
- [Sage ACT! Version Comparison](#)

If you have not purchased ACT! 2013 yet, but would like to, we've updated our "Shop Online" section to include ACT! 2013 pricing, which is 25% of MSRP for the month of September.

Click [HERE](#) to save. ACT! Now!

ACT! Freebies

Recently a customer asked me if ACT! supported emailing directly through gmail, and I reported no. Gmail is, after all, not so much an application as a web based service, and could not be set as your default email client.

After providing that bit of happy news, I tried my normal sources to see if I could find an add-on solution that would provide this functionality, and again I came up with nothing.

Undaunted, I continued Googling the issue until I found a

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

[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..

Upgrade safe for two versions of ACT!

[The Advisor for Financial Professionals](#):

The Advisor integrates with Sage ACT!, the leading CRM solution, and is designed for financial professional. The advisor has been developed over 15 years, and is the most sophisticated and power offering connected to the Sage CRM system.

company in New Zealand called Xact Software who not only offered such a utility, but provided it free of charge. More over, they had a handful of other applets that I thought were quite useful that were again FREE OF CHARGE.

So by way of promoting them and other generous vendors offering free ACT! addons, we have published a page on our website dedicated to ACT add-ons, and have provided special emphasis to the ones that are FREE OF CHARGE.

That link is as follows:

<http://keystroke.ca/default.asp?plD=64>

I encourage all of you to review this page to see if there is an add-on of interest. You might find an applet like the Gmail one my customer coveted, and find it at no cost. One of my personal favourites is "History Fix" by Exponencial that allows you to set the default History when you click Ctrl+H.

Sage ACT! Obsolescence Policy

ACT! 2010 Users, Please Read!

*** Less than 2 weeks left to upgrade**

* We ran this article in last month's newsletter, but with the upcoming deadline next week, we thought it worth rerunning.

In May 2012, Sage implemented an Upgrade Pricing Obsolescence Policy where Sage honours upgrade pricing for customers with the current release and, in most cases, two prior releases of a product. Sage implemented this policy for ACT! by Sage 2009 customers and they had a deadline of 5/31/12 to receive upgrade pricing.

To further align the obsolescence of upgrade pricing with Sage's annual release cycle, Sage will be moving the deadline for ACT! by Sage 2010 customers and ACT! by Sage 2009 vertical customers to 9/30/12.

This means starting 10/1/12, ACT! 2010 customers will no longer be eligible for upgrade pricing. Obviously with Sage ACT! 2013 shipping, Sage ACT! 2010 users are outside the N-2 (New minus two) version upgrade policy. (As ACT! 2010 will be three versions away from ACT! 2013.)

To recap, below is a listing of products eligible for upgrade pricing, along with their respective deadline dates, and products not eligible for upgrade pricing.

Products Eligible for Upgrade Pricing:

- Sage ACT! 2012 (14.x) products until 9/30/14
- Sage ACT! 2011 (13.x) products until 9/30/13
- ACT! by Sage 2010 (12.x) products until 9/30/12
- ACT! by Sage 2009 or older no longer eligible for upgrade pricing

If you are an ACT! 2010 user, and you'd like to upgrade before the October 1st deadline, and take advantage of the existing "Early Bird Discounts" on ACT! 2012 and 2013, please call us at 416-499-3090 or visit our online shopping cart at <https://keystroke.ca/browseproducts.asp?catID=3>.

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 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.

The Patriot ACT! gives good reason for Canadians to avoid US based Cloud Services

Politico is running a [fantastic piece](#) on the problems that the PATRIOT Act is raising for American cloud companies in the market for overseas customers. The piece details how foreign cloud customers are worried that the US government will use its expanded surveillance powers to snoop on any data that's stored on US soil, so they're eschewing US-based cloud providers in favor of the competition. Non-US competitors are explicitly feeding this trend by raising the specter of US government data snooping as part of their bids for business, a tactic that seems to be working in some cases.

[READ MORE](#)

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 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?

Please click on the dates below to register for that class.

- [October 2nd](#) - End User
- [October 30th](#) - End User
- [September 26th](#) - Administrator

KEYSTROKE QUALITY COMPUTING

- *Top Five in North America ACT! Sales*
- *#1 in English Canada*
- *Member of the Sage ACT! Advisory Council (BPAC)*
- *ACT! Premier Trainer*
- *Four Full-Time ACT! Consultants*
- *ACT! Database Hosting Services*

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