

## Get Vista and other cutting-edge Microsoft products with your ACT! — if it's ready

Application: ACT! Classic/2006/2007



### AT A GLANCE

It's tempting to buy the latest operating system, upgrade to the newest version of your most-used applications, and purchase a new laptop every few years, but upgrading your ACT! system to Microsoft Windows Vista, Microsoft Internet Explorer 7 or Microsoft Office 2007 could leave ACT! dead in the water. Before you upgrade your computer, learn what new products will and won't work with ACT! and how to ensure the smoothest sailing once you do upgrade.

To help you decide if and how to proceed with Microsoft product upgrades, we'll:

- Examine what options you have for ACT! 2006 and previous ACT! versions.
- Show you how to remove one incompatible feature that might have gotten installed without your wanting it.
- Identify which ACT! 2007 editions and add-ons work with Vista.
- Review system requirements for running ACT! on Vista.
- Caution against persistent ACT!-Vista issues that may cause you to reconsider your upgrade plan.

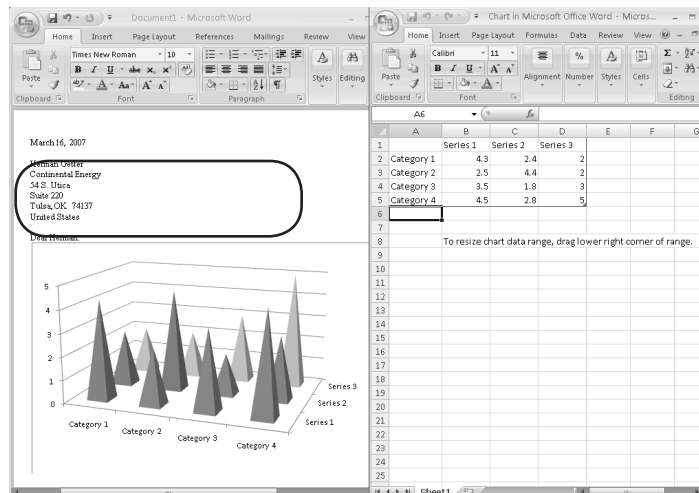
Most of us want to stay on the forefront of technology so we can sell better, support co-workers better, or have the most fun with our computers. Unfortunately, not all the applications you rely on make the grade when it comes to upgrading your operating system or supporting applications — and ACT! is no different. At this time, ACT! offers very limited support for Microsoft's latest products — Microsoft Internet Explorer 7 (IE7), Microsoft Office 2007 and Microsoft Windows Vista. So before you consider upgrading, check out our guide to the ins and outs of ACT! and the latest Microsoft offerings.

### ACT! 2006/2005/Classic support in a nutshell

If you use ACT! Classic, 2005 or 2006, you're out of luck when it comes to these

new Microsoft products — we offer you a sneak peek of Word 2007 in **Figure 1**. No edition of ACT! 2006 or earlier ACT!

versions works with Office 2007, IE7 or Vista. For these ACT! versions you must use Microsoft Office 2000, 2002 or 2003,



1: Check out Office 2007's new look and how you can design stunning charts in Word 2007 — but don't try it from an ACT! template just yet.



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Internet Explorer 6, and Windows 2000 Service Pack 4 or Windows XP Service Pack 2.

**Exception:** Although Sage won't support pre-2007 ACT! versions on Vista, our testing has shown that ACT! Classic, specifically version 6, will run on Vista.

**Warning:** Through automatic updates on Windows XP, Microsoft will install IE7. If you have IE7 — it offers tabbed browsing, as shown in **Figure 2** — and you're experiencing ACT! problems with IE7, you should revert back to IE6. To do so:

1. Select Start | Control Panel.
2. Open the Add Or Remove Control Panel.
3. Select Windows Internet Explorer 7; click Change/Remove and follow the prompts.

**Note:** If you can't find Windows Internet Explorer 7 in the Add Or Remove Control Panel, Select Start | Run. Then type `C:\Windows\ie7\spuninst\spuninst.exe` in the Open text box and press [ENTER].

## Block IE7 notifications on multiple computers

If you support several computers at your office, you should block Microsoft updates from asking other users to install IE7 — especially if you've gone through the hassle of removing it from each computer. You can implement a quick fix using the IE7 Blocker Toolkit method.

With the Toolkit, you can create a Windows Registry entry that will prohibit updates from offering IE7 to users. From the command prompt, you'll type something like this: `ie70blocker.cmd computername /B`. To download the toolkit, point your browser to [www.microsoft.com/downloads/details.aspx?FamilyID=4516A6F7-5D44-482B-9DBD-869B4A90159C&displaylang=en](http://www.microsoft.com/downloads/details.aspx?FamilyID=4516A6F7-5D44-482B-9DBD-869B4A90159C&displaylang=en).

## ACT! 2007 offers some flexibility

ACT! 2007 does offer some compatibility with Microsoft products because 2007 came out around the same time or after some Microsoft product launches. However, you may find that they don't work quite as well as you would hope. For example, ACT! 2007 (9.0.0.557 or later) will run on Windows Vista, as shown in **Figure 3**, but some features won't work.

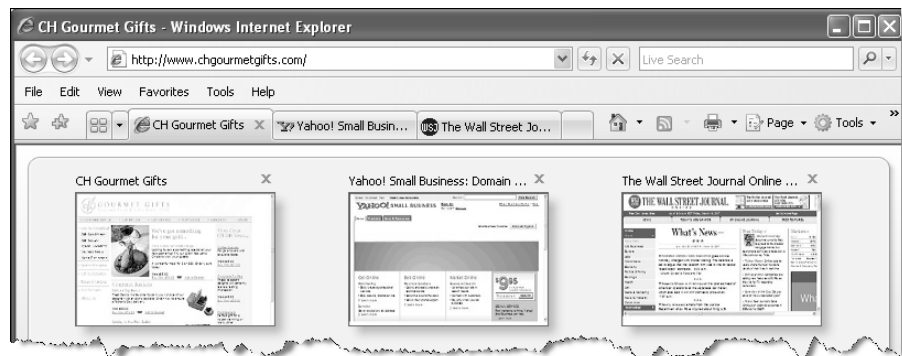
**Critical distinction:** Only ACT! 2007 runs on Vista — not ACT! Premium for Workgroups 2007, ACT! Premium for Web 2007, ACT! for Palm v2.0 or Accounting Links. Additionally, ACT!

Link for Palm OS and ACT! Link for Pocket PC are not compatible.

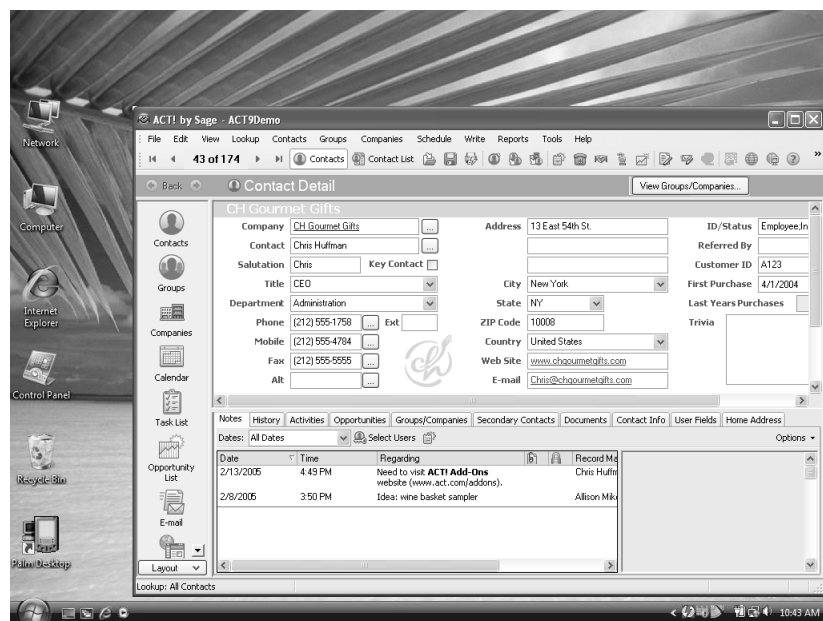
ACT! currently does *not* offer support for any ACT! edition with Office 2007. However, ACT! 2007 editions will work with IE7.

## Run ACT! 2007 on Vista

Let's say your corporate IT department is forcing you into a Vista upgrade, or your laptop broke and you're struggling to find a new one to buy with Windows XP installed. You can run ACT! 2007 on Vista with boosted hardware specs and



**2:** Internet Explorer 7 on Windows XP or Vista offers tabbed browsing and the Quick Tabs feature that shows you a thumbnail view of each website you have open. However, IE7 may give you some trouble when using it with ACT! versions before 2007.



**3:** Windows Vista offers a cool new look and added security — and you can have it all if you can use ACT! 2007.

with only a few incompatibilities. Let's take a look at what you need to know to get Vista and ACT! to play nice.

### Hardware requirements

ACT! 2007 users know that the hardware specifications for 2007 to work properly are quite significant. For 2007 on Vista, they're even higher. The specs are:

- Pentium 4, 1.8 GHz processor
- 1 GB RAM
- SVGA (800x600) video card
- 1 GB free hard drive space
- CD-ROM drive

### Vista and Office requirements

For 2007 to run on Vista, you must use one of the following editions of Vista: Home Basic, Home Premium, Ultimate, Business, Enterprise.

ACT! 2007 only integrates with Office 2002 or 2003 on Vista — it does *not* work with Office 2000 on Vista. Therefore, to take advantage of ACT!-Office integration features, you must install Office 2002 or 2003 to use ACT! with Microsoft Outlook, Microsoft Word or Microsoft Excel.

### ACT! 2007 on Vista — prepare for what won't work

If you do run ACT! 2007 on Vista, you must first install the ACT! Vista hot fix, but you'll need to take particular note of the 2007 functions that still won't work properly.

#### To download and install the Vista hot fix:

1. Close Microsoft Outlook, Excel and Internet Explorer, if open.
2. Back up your email database and all contact databases on your computer.
3. Close all unnecessary programs including anti-virus and firewall software.

4. Open ACT! and select the Help | ACT! Update from the menu bar to ensure you have the latest version of ACT! 2007.
5. Follow the prompts to download and install any updates.
6. Point your browser to ACT!'s Knowledgebase article 20180 to download and install the Vista hot fix, ACT!905571VistaHotFix.exe.

### Persistent compatibility issues

With the hot fix installed, you still need to work around these incompatibilities:

- Can't uninstall ACT! 2007 from the Uninstall option
- Can't use ACT! Update to install the latest version of ACT!
- Print preview errors appear
- Phone number formatting errors appear
- Can't import Tab Delimited text files
- Access denied errors appear if you don't run ACT! as a user with Administrator rights

### ACT! in the future

According to Sage Software, they are planning an update to ACT! 2007 that will resolve all compatibility problems. In fact, Sage recently released an update to ACT! 2007 making the most up-to-date version 9.01. The patch offers fixes for many of 2007's glitches and also offers additional support for Windows XP Media Center and Vista.

**Warning:** The 9.01 patch for ACT! 2007 Premium for Workgroups does *not* include support for Windows Vista. What it does include is:

- Fixes and improvements to Activity scheduling
- Copy and paste Histories without problems
- Preview pane problems resolved
- Fixes to Outlook integration
- Report filtering enhancements
- Fixes for remote database synchronization of attachments

### Get around UAC when installing ACT! on Vista

You've probably seen that Mac commercial where the "Mac" keeps trying to talk to the "Vista computer," but keeps getting interrupted for requests for permission. As funny as "You're coming to a sad realization: Cancel or Allow" is, working around Vista's User Account Control (UAC) to install ACT! 2007 is no laughing matter. Fortunately, you can disable UAC permanently or just for the install.

#### To disable UAC prompts with local group policy:

1. Select Start | Administrative Tools | Local Security Policy.
2. Click Continue on the User Account Control dialog box.
3. Navigate to Local Policies\Security Options.
4. In the right pane, double-click on the User Account Control: Behavior Of The Elevation Prompt For Administrators In Admin Approval Mode policy.
5. Select Elevate Without Prompting from the dropdown list, and click OK. The policy takes effect immediately.