

act!™ v16: Upgrade

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Overview

To become acquainted with the new features available in Act! v16, you will:

- ☒ Understand what has changed.
- ☒ Start Act!.

Act! Ownership Change

Swiftpage LLC had been a long-term partner with Sage NA, providing integrated email marketing solutions for Act! customers, when in March 2013, they purchased Sage Act! and SalesLogix (another CRM owned by Sage).

The product ownership has now gone from being a primarily accounting-focused company (Sage NA) that sought annual upgrades (aka tax updates in other products) to a company that has made their bones in using marketing to boost your business.

To signal the new change in ownership, Swiftpage rebranded the product from Sage Act! to act! with new colors and logo style. While much of the same development, tech support, and sales teams also made the transition to the new ownership, there is a new feeling of excitement for what is being planned for the product.



The product will no longer use a year designation for which version you are using (another indication that Swiftpage is not focusing on forced annual renewals). Instead, the product will be identified by version numbers. The version released in September of 2013 is known as Act! v16 (aka 2014).

Starting Act!

Moving from earlier versions of Act! to Act! v16 is a relatively painless process (really, it is)! You will find some visual changes like the new Act! logo. You will find some features greatly enhanced over the previous version (like Act! Premium Web and Mobile features). You will also be delighted to find some totally new features (like the History List view and Calculated fields).

We will look at these differences and investigate more closely some of the useful and powerful new features that make Act! even better than it was.

So let's start up Act! and see what all the fuss is about. When normal installation is performed, Act! creates the program icon in a program group called **Act!** or **Act! Premium**. Act! may also create a desktop icon you can click on to run the program.

Procedure: *To start Act!...*

1. Click the **Start** button, point to **All Programs**, point to **Act!** folder and then click the **Act!** icon.
or
Double-click the icon on the desktop.



Login

The login procedure has not changed. When a database with more than one defined user is opened, a **Login** dialog box appears. You must enter your correct user name and a password (if there is one) and click **OK** or press **[Enter]**. User names and passwords are not case sensitive.

A screenshot of a Windows-style dialog box titled "Log on to ACTDemo". It contains two text input fields: "Enter your user name for this database:" with the text "Chris Huffman" entered, and "Enter your password for this database:" with a masked password "*****". Below the password field is a checkbox labeled "Remember password" which is currently unchecked. At the bottom right are "OK" and "Cancel" buttons.

V16 (aka 2014) Upgrade Changes

There were a ton of minor changes, updates, and fixes incorporated into the new Act! v16, but the primary ones are:

- History List view
- Automatic Company Creation
- Calculated Fields
- Email alerts when Act! Scheduler fails
- Ability to reschedule multiple activities while maintaining ownership
- Create Lookup from Universal Search

For Premium **Web** users, there were also some great updates:

- Create new fields or edit existing field definitions from the Web interface
- Make basic updates to the Layout Design from the Web interface (not all features are available)
- Chrome support!

For the Premium **Mobile** Web users, Act! added the ability to:

- View, add, or define Groups and Companies (Opportunities were added in 2012)
- Record history of email sends from the mobile version
- Send an email to each contact in the group.
- Tablet version contains additional list views

So let's look at each of these new features.

2013 Upgrade Changes

Just in case you missed it, the Act! 2013 changes are also included at the end of this guide.

Those major changes were:

- Act! Premium Mobile (It was really added in a late release of 2012, but hardly anyone knew about it)
- Smart Tasks Upgrades that include Data and Field Triggers
- The ability to run Smart Tasks as a Service
- New Social Media Updates tab
- Opportunities were added to Premium Mobile views

