

ACT! by Sage

Premium for Workgroups 2007 (9.0)

Start Here

ACT! by Sage Premium for Workgroups 2007 (9.0) *Start Here*

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Released: 11/2006 for ACT! by Sage Premium for Workgroups 2007.
TP514

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Printed in the United States of America.

10 9 8 7 6 5 4 3 2 1

Welcome to ACT! by Sage Premium for Workgroups 2007 (9.0). This software is designed for business teams and workgroups. The software uses Microsoft® SQL Server™ Express Edition or Microsoft SQL Server Express Edition, depending on the ACT! product edition you purchase (for more information, see "[Using Microsoft SQL Server with the Software](#)" on page 2). Refer to the system requirements on the product packaging or the ACT! Web site (www.act.com).

About the Start Here

Read this guide before installing the ACT! Premium for Workgroups 2007 software. This guide contains important information for installation, upgrades, and conversion, and is organized as shown in the following table.

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Preparing to Install

Using Microsoft SQL Server with the Software

The ACT! software is available in two editions:

- ACT! by Sage Premium for Workgroups 2007 (9.0) (EX Edition), which comes with Microsoft SQL Server Express Edition.
- ACT! by Sage Premium for Workgroups 2007 (9.0) (ST Edition), which comes with Microsoft SQL Server Express Edition and Microsoft SQL Server Standard Edition.

The following table identifies the Microsoft Windows operating systems that we recommend for each SQL version.

Microsoft Windows Operating System	Express Edition	Standard Edition
XP Home (Service Pack 2)	X	
XP Professional (Service Pack 2)	X	
2000 Professional (Service Pack 4)	X	
2000 Server Standard Edition (Service Pack 4)	X	X
Server 2003 Standard Edition (Service Pack 1)	X	X
Server 2003 Enterprise Edition (Service Pack 1)	X	X
Server 2003 Web Edition (Service Pack 1)	X	
2003 Small Business Server (Service Pack 1)	X	X

CD Contents

The CDs you receive with the ACT! Premium for Workgroups 2007 product depend on the product edition you purchase.

- The ACT! Premium for Workgroups 2007 (9.0) (ST Edition) product contains CDs 1 and 2.
- The ACT! Premium for Workgroups 2007 (9.0) (EX Edition) product contains CD 1 only.

Contents of CD 1

- **Install ACT!** includes:
 - **ACT! Premium for Workgroups** software, including the ACT! Scheduler tool and supporting files. The ACT! Scheduler tool lets you schedule database back up, maintenance, and synchronization, and Outlook activity synchronization. For more information about the tool, see "About the ACT! Scheduler" in the Help.
 - **Microsoft .NET 2.0 Framework** - Platform used to build and run the ACT! Premium for Workgroups 2007 software. This component is required and is installed with the software, unless it is already on your computer.
 - **Microsoft SQL Server 2005 Express Edition** - Software used to create and manage the ACT! database. This component is required. If you purchased the ACT! Premium for Workgroups 2007 (9.0) (EX Edition) software, Microsoft SQL Server Express Edition is installed with the software. If you purchased the ACT! Premium for Workgroups 2007 (9.0) (ST Edition) software, you can alternatively install Microsoft SQL Server Standard Edition, provided on CD 2.

With a SQL Server Express Edition installation, you can have up to 30 active users per database and a maximum of 4 gigabytes (GB) of data for each database.

Note: The 4 GB limit does not include supplemental files, such as layouts and templates, attachments, and e-mail. ACT! E-mail is a separate database with its own 2 GB limitation.

- **Software for Handhelds** includes:
 - **ACT! Link for Palm OS®** - Application used to send and receive ACT! Premium for Workgroups 2007 data to/from a Palm OS handheld device. See the ACT! Handheld Links *Start Here* for installation instructions.
 - **ACT! Link for Pocket PC** - Application used to send and receive ACT! Premium for Workgroups 2007 data to/from a Pocket PC handheld device. See the ACT! Handheld Links *Start Here* for installation instructions.

- **Product Documentation** includes:
 - ACT! *Start Here* guide
 - ACT! *User's Guide*
 - ACT! Handheld Links *Start Here*
 - Handhelds Installation Tour
- **Related Software** includes:
 - **Adobe® Reader® 6** - Optional application that lets you view documentation and output ACT! reports as PDF documents.
 - **Microsoft Internet Explorer® 6** - Used for the software's integrated Internet Services.
- **Online Resources** includes links to ACT! add-on programs, the support site, and more.
- **ACT! Synchronization Services** includes:
 - **ACT! Network Synchronization Service** - Optional service used to synchronize over a network when the main database is not open. This is a separate installation. For installation and set up instructions, see "Installing the ACT! Network Synchronization Service" in the *User's Guide*.
 - **ACT! Internet Synchronization Service** - Service used to synchronize over the Internet when the main database is not open. This is a separate installation. For installation and set up instructions, see "Installing the ACT! Internet Synchronization Service" in the *User's Guide*.

Contents of CD 2

- **Install Microsoft SQL Server 2005** includes:
 - **Microsoft SQL Server 2005 Standard Edition** - Software used to create and manage the ACT! Premium for Workgroups 2007 (9.0) (ST Edition) database. Microsoft SQL Server 2005 Standard Edition allows greater scalability than the Express Edition.

Note: Microsoft SQL Server 2005 Express Edition is provided on CD 1.

Before You Install

This section explains what you need to do before you install the ACT! Premium for Workgroups 2007 software, whether for the first time (New User) or as a version upgrade (Upgrade User).

New User

✓	Be sure to:	If you do not, this will happen:
	Sign on as a Windows administrator.	Installation and activation will fail.
	Make sure your system meets the hardware and software requirements listed on the product package or Web site.	Installation will fail.
	Disable antivirus and firewall software. (You can enable it after installation is complete.)	Installation may fail.
	Close all open applications.	Installation may fail.
	If you want to install to a destination other than the default (C:\Program Files\ACT\ACT for Windows), verify that folder-sharing rights are enabled and the directories exist. Note: You cannot install the software to a network drive or run it from CD.	Installation will fail.

Upgrade User

✓	Be sure to:	If you do not, this will happen:
	Complete the items on the New User list.	Installation will fail.
	If you will synchronize databases, verify that they all use the same version and tier of the ACT! software.	Databases will not synchronize after installation.
	If you used Palm OS or Pocket PC handheld devices with the ACT! 6.x, ACT! 2005, or ACT! 2006 software, update the handheld links. Note: After installing ACT! 9.0, install the 9.0 version of the handheld links software. For install instructions, see the ACT! Handheld Links <i>Start Here</i> (available on CD 1).	You will lose any data on the handheld device that has not been synchronized with ACT!.
	If you are using ACT! for Palm OS 2.0, download an update that supports compatibility with the ACT! Premium for Workgroups 2007 product. Install the update after installing the ACT! product. The update is available from: www.act.com/support/updates	You will not be able to use the ACT! for Palm OS 2.0 product until you install the update.

Next Step

New Users Install. See "[Installing the ACT! Premium 2007 Software](#)" on page 12.

Upgrade Users from ACT! 3.x - 6.x Applications Read "[What ACT! 3.x - 6.x Users Should Know](#)" on page 7.

Upgrade Users from ACT! 2005 and ACT! 2006 Applications Read "[What ACT! 2005 and ACT! 2006 Users Should Know](#)" on page 10.

Upgrade Users from ACT! 2007 Applications Read "[What ACT! 2007 Users Should Know](#)" on page 12.

About Upgrading the Database

This section explains how to prepare the database before upgrading to ACT! Premium for Workgroups 2007 from the following software:

- ACT! 3.x - 6.x
- ACT! 2005 (7.x) or ACT! 2006 (8.x)
- ACT! 2007 (9.0)

What ACT! 3.x - 6.x Users Should Know

The underlying architecture for ACT! Premium for Workgroups 2007 is different than that for ACT! 3.x - 6.x, so you must prepare the ACT! 3.x - 6.x database for conversion. Note the following:

- You must be an Administrator user in the original database to convert it.
- Converting a database increases the database size. If you are using Microsoft SQL Server 2005 Express Edition, and the database is over 4 GB, it will not convert.
- Conversion places the new database locally.
- Conversion copies the original database and then converts it. The original ACT! 3.x - 6.x database is retained.
- Once you convert an ACT! 3.x - 6.x database to an ACT! Premium for Workgroups 2007 database, you cannot open the converted database in previous versions of the ACT! software, and you cannot save data to the previous versions.
- An ACT! Premium for Workgroups 2007 database has special types of fields for phone numbers, addresses, and secondary contacts. If you added custom fields of these types in your ACT! 3.x - 6.x database, use the Custom Conversion option. This option lets you map your custom fields to the ACT! Premium for Workgroups 2007 database fields. No data is lost; it all converts. See "[Types of Conversion](#)" on [page 17](#) for details.
- ACT! 3.x - 6.x databases store date and time fields as literal values (for example, an appointment scheduled at 1:30 P.M. in Arizona displays to all users as 1:30 P.M., regardless of a user's time zone). ACT! Premium for Workgroups 2007 databases store date and time fields as Greenwich Mean Time (GMT), so the data displays according to a user's time zone. If you have multiple databases, set all the databases to a "home" time zone before you upgrade. You can reset the time zone for individual databases after conversion.
- Fields that are set to "Not Allow Editing" in an ACT! 6.x database convert to Read Only fields in an ACT! 2007 database.
- If you synchronize remote databases in your ACT! 3.x - 6.x software, [synchronize all data into one database](#) before converting. After you install the ACT! 2007 software, convert that database, and then create new remote databases to distribute to your remote locations and users. The Help describes how to create and distribute new remote databases.

How Data Converts

Data	Converts?		Comments
	Yes	No	
Activities	X		
Activity Series		X	
Contact records	X		
Database tables and fields	X		
E-mail addresses	X		If you stored multiple e-mail addresses for a contact, the software converts those addresses to new fields, but you must add the new fields to see them on layouts. The fields are visible in the Define Fields list.
Group members	X		These convert as static members. If a group's membership was based on a rule, that criteria does not convert.
Group records	X		
Group rules		X	
Histories	X		
Macros		X	
Menu/toolbar customizations		X	
Notes	X		
Opportunities	X		Opportunities without a sales stage or probability convert as a New Opportunity stage with 100% probability.
Opportunity processes	X		These convert as a Previous ACT! Sales Process.
Microsoft Outlook® activities updated to ACT! calendars		X	

Data	Converts?		Comments
	Yes	No	
Private subgroups	X		A private subgroup of a public group converts to a public group. A private subgroup with a different Record Manager than its parent group converts to a private parent group.
Queries		X	
Saved reports (.rpt files)		X	
Some preferences		X	
Synchronization settings		X	
User records	X		

Preparing the 3.x - 6.x Database for Conversion

To prepare the database for conversion, complete the following tasks:

✓	Task
	If you use passwords, record the usernames and passwords for use after conversion.
	Delete obsolete data in the existing database. See "About database maintenance" in the Help.
	Compress and re-index the database. See "About database maintenance" in the Help.
	Run the ACT!Diag tool. The Integrity Checker and all items should be checked green.
	Open the database again to re-index it. See "About database maintenance" in the Help.
	Back up the ACT! database.

Next Step

Install. See "[Installing the ACT! Premium 2007 Software](#)" on page 12.

What ACT! 2005 and ACT! 2006 Users Should Know

When you upgrade from the ACT! Premium for Workgroups 2005 or 2006 software to the ACT! Premium for Workgroups 2007 software, be aware of the following:

- You cannot have the following versions of the ACT! software on the same machine as the ACT! Premium for Workgroups 2007 software:
 - ACT! 2005 or 2006
 - ACT! Premium for Workgroups 2005 or 2006
 - ACT! Premium for Web 2005 or 2006

When you install the ACT! Premium for Workgroups 2007 software, the install process uninstalls any ACT! 2005 or 2006 software.

- To upgrade the main database, you must be an Administrator or Manager user, and must upgrade it on the computer it resides on. You cannot browse to a database on another computer to upgrade it.
- To upgrade a remote synchronized database, you must be an Administrator or Manager user (or a Standard user, if there is no active Administrator or Manager), and you must belong to the remote database.
- An upgrade uses the original database, not a copy; however, the upgrade process lets Administrator and Manager users (but not Standard users) create a backup copy of the database before upgrading it.
- Once you have upgraded a database, you cannot open it in previous ACT! versions, and you cannot save data to the previous versions.
- If the installer detects an ACT! 2005 or 2006 e-mail database, it will ask if you want to save a copy of the database before upgrading it.

Note: Once you upgrade the e-mail database, it will not work with the ACT! 2005 or 2006 software. Therefore, you should save a copy of the e-mail database, in case you choose to move back to the ACT! 2005 or 2006 software. The copy stays in the original location. The installer puts the upgraded e-mail database in C:\Documents and Settings\ All Users\Shared Documents\ACT\ACT for Windows\Email.

- You do not need to upgrade ACT! 2005 or 2006 database supplemental files, such as layouts, reports, and templates. They open in the ACT! Premium for Workgroups 2007 software.

How Data Upgrades

Data	Upgrades?		Comments
	Yes	No	
Activities	X		
Activity series	X		
Column customizations		X	
Company records	X		
Contact records	X		
Database tables and fields	X		
Database user preferences	X		
Global ACT! user preferences	X		When users open the software for the first time, the software automatically copies and upgrades the ACT! 2005 or 2006 user preferences. If the software cannot locate those preferences, it uses the default preferences.
Group records	X		
Histories	X		
Menu/toolbar customizations		X	
Notes	X		
ON setting for Accept Incoming Syncs	X		The port number is retained.
Opportunities	X		
Outlook activities updated to ACT! calendars	X		If you run Update Activities after upgrading the database, no duplicates are created.
Queries	X		
Synchronization settings	X		This does not include synchronization services. (See the Knowledge Base articles for information on upgrading the synchronization services.)
User records	X		

Next Step

Install. See "[Installing the ACT! Premium 2007 Software](#)" on page 12.

What ACT! 2007 Users Should Know

When you upgrade an ACT! 2007 database to an ACT! Premium for Workgroups 2007 database, no data is lost.

- Administrator or Manager users can upgrade an ACT! 2007 main database to an ACT! Premium for Workgroups 2007 database.
- Administrator or Manager users (or Standard users if there is no active Administrator or Manager user) can upgrade a remote synchronized database they belong to.
- When you install the ACT! Premium for Workgroups 2007 (9.0) (ST Edition) software, you can optionally uninstall Microsoft SQL Server 2005 Express Edition, and install Microsoft SQL Server 2005 Standard Edition. If you do so, the ACT! 2007 databases that used Express Edition on that machine remain accessible and can be upgraded to the Premium tier.
- Upgrading an ACT! 2007 database uses the original database, not a copy. When a user opens the ACT! Premium for Workgroups 2007 software, the ACT! 2007 database upgrades automatically.
- Once the database is upgraded, ACT! 2007 users cannot open it. To access the database, they must upgrade to the ACT! Premium for Workgroups 2007 software.

Next Step

Install. See "[Installing the ACT! Premium 2007 Software](#)" on page 12.

Installing, Registering, and Activating

Installing the ACT! Premium 2007 Software

This section explains how to install the ACT! Premium for Workgroups 2007 software.

Note: The Install Wizard guides you through the process. Click Back to change the information on previous pages before the install starts, or click Cancel at any time to cancel the installation.

For the ACT! Premium for Workgroups 2007 (9.0) (ST Edition) software, you must first install Microsoft SQL Server Standard Edition. See "[Installing Microsoft SQL Server Standard Edition](#)."

Note: You can select a non-default installation location for SQL Server Express Edition and SQL Server Standard Edition. However, Microsoft requires that some key system files are installed in the default location inside the local Program Files directory.

For the ACT! Premium for Workgroups 2007 (9.0) (EX Edition) software, you can just install the ACT! software. This also installs Microsoft SQL Server Express Edition. See "[Installing the ACT! Premium for Workgroups 2007 Software](#)" on page 14.

Installing Microsoft SQL Server Standard Edition

To install Microsoft SQL Server Standard Edition

1. Insert CD 2 in the CD drive.
2. Click **Install Microsoft SQL Server 2005**.
3. Follow the instructions on the Install Wizard pages to choose a regional version, accept the license agreement, choose a destination location, and complete installation. Click **Next** to advance through the wizard.

Note: If you do not accept the license agreement, installation stops.

The wizard installs Microsoft SQL Server 2005 Standard Edition. The installation may take a few minutes.

4. On the Installation Complete page, click **Finish**.

Next Step

Install the ACT! software. See "[Installing the ACT! Premium for Workgroups 2007 Software](#)" on page 14.

Installing the ACT! Premium for Workgroups 2007 Software

Tip: To easily install the ACT! Premium for Workgroups 2007 (9.0) (EX Edition) software in a workgroup environment, you can create a silent install. For more information, see "Understanding silent installations" in the Help.

To install the ACT! Premium for Workgroups 2007 software

1. Insert CD 1 into the CD drive. The program starts automatically.

Note: If the installation program does not start automatically, do the following: From the Windows Start menu, click Run. Type D:SETUP, and then click OK. (Substitute the appropriate drive letter for your CD drive.)

From the CD browser page, you can install the software and other listed items.

2. Click **Install ACT!**.

The Install Wizard checks for necessary components.

If you do not have the required version of MDAC or the Windows Installer on your computer, the Install Wizard installs them. Then, the Install Wizard asks if you want to reboot your computer. Click Yes. (Microsoft requires the reboot. If you click No, the installation will fail.)

After rebooting, log on to your computer if necessary. The Install Wizard resumes automatically. (If it does not, repeat steps 1 and 2 of this procedure.)

If you do not have Microsoft .NET 2.0 Framework on your computer, the Install Wizard next asks if you want to install it. Click Yes to open the .NET installer. (If you click No, the installation stops.) After installing the .NET framework, the Install Wizard starts installing the ACT! Premium for Workgroups 2007 software.

3. Follow the instructions on the wizard pages to choose a region and accept the license agreement.

Note: If you do not accept the license agreement, the installation stops.

Click **Next** to advance through the wizard. If message prompts appear, read and follow the instructions.

4. Choose the destination locations (or keep the default locations) for the ACT! and SQL Server Express software installation. (The destination location is the location, such as a drive, folder, or directory, for the software and supporting files.)

Caution: If you add functionality with plug-ins (third-party software applications that work with ACT!), they may stop working if you install ACT! to a non-default location. You may need to reinstall them.

Note: If you are using the ACT! Premium for Workgroups 2007 (9.0) (ST Edition) software and have already installed Microsoft SQL Server Standard Edition, you cannot specify a destination location for SQL Server Express.

5. On the **Specify who can use ACT!** page, select an option. By default, **Anyone who uses this computer** is selected (and recommended). Click **Next** to advance.

Note: If you select the Only me option, only the current Windows user can use the demonstration database files, folder structures, and the ACT! .pad file. (The .pad file is a pointer to the ACT! database.)

6. Follow the instructions on the remaining wizard pages to select a program folder, place icons, and copy files. Click **Next** to advance.
7. On the **ACT! Setup Complete** page, read the information, and then select the options to **Launch ACT!** and **View README file**. Click **Finish**.
8. If you selected to launch (start) the software, when it opens, the ACT! Update message appears. Click **Yes** to check for updates; click **No** to continue with registration.

Note: You must register and activate the software to use it. If you do not register and activate it, the software will stop working in 30 days.

Next Step

Register and activate the software as described in the next section.

Registering and Activating the Software

This section explains how to register and activate the software. This is required to use the product. Registration ensures you of timely program updates, upgrade offers, and customer support options. After you register, you activate the software on each computer that the software is installed on.

The ACT! Registration and Activation Wizard guides you through the process. You must have the serial number (printed on the back of the CD sleeve or provided with your downloaded product). You can register by Internet or telephone.

To register and activate the software

When you first start the software, the Registration and Activation Wizard appears.

1. In the **Registration Options** box, select an option (**Internet** or **Phone**), and then click **Next**.

Note: If you do not register and activate the product when you first start it, you can do it later. From the Help menu, click Register ACT! to open the Registration and Activation Wizard.

2. Follow the instructions on each page. Click **Next** to advance.

Tip: If you are upgrading from the ACT! 2005 or 2006 software, the ACT! 2005 or 2006 serial number remains in the Windows Registry on the computer, in case you need to go back to that version.

3. When finished, click **Activate**.

If you receive an error message, follow the instructions in the message.

Next Step

New Users You are done! You can:

- Use the Getting Started Wizard to help you set up your word processor, e-mail system, and database.
- Start working with the ACT! software. See "Getting started" in the Help.
- View the feature tours to learn more about ACT! features. In the ACT! software, point to Help, point to Feature Tours, and then click a tour.
- Create a remote database, if you plan to synchronize with remote databases. See "Creating remote databases" in the Help.

- If you administer the ACT! software for a workgroup that will share the database, make sure that all users install the ACT! Premium for Workgroups 2007 software. Then, you can distribute a shortcut to the .pad file for the ACT! database.

Upgrade Users from ACT! 3.x - 6.x Applications Convert the database. See "Converting an ACT! 3.x - 6.x Database" on page 17.

Upgrade Users from ACT! 2005 or 2006 Applications Upgrade the database. See "Upgrading an ACT! 2005 (7.x) or 2006 (8.x) Database" on page 20.

Upgrade Users from ACT! 2007 Applications Upgrade the database. See "Upgrading an ACT! 2007 Database" on page 21.

Upgrading and Converting Databases

Converting an ACT! 3.x - 6.x Database

This section explains the differences between Standard and Custom conversion and gives the steps for converting an ACT! 3.x - 6.x database.

Types of Conversion

Conversion maps data from the fields of one database to data in the fields of another database. The two conversion types for ACT! 3.x - 6.x databases are Standard and Custom. All data fields convert with either option; no data is lost.

Standard conversion (Recommended) Uses the default mapping of fields. Use Standard conversion if you have not added custom address, phone, or secondary contact fields to your ACT! 3.x - 6.x database.

Custom conversion Lets you change field mapping before converting the database. Use Custom conversion if you have added custom fields for addresses, phone numbers, or secondary contacts to your ACT! 3.x - 6.x database. During conversion, a secondary contact record is created if any fields on the Secondary Contacts tab contain data. (For example, if a Contact field on the Secondary Contacts tab has data, but no other fields on the tab do, the conversion produces a secondary contact with only the contact name filled in.)

When database conversion is complete, you can choose to convert supplemental files. The option to convert them later is selected by default. For more information on converting supplemental files, see "Converting ACT! 3.x - 6.x supplemental files" in the Help.

Converting an ACT! 3.x - 6.x Database

Follow the instructions for a Standard or Custom conversion. For help on any page of the Database Conversion Wizard, press F1.

To perform a Standard conversion of an ACT! 3.x - 6.x database

1. Open the ACT! Premium for Workgroups 2007 software, and then click **Open Database** on the toolbar.
2. In the **Open** dialog box, in the **Files of type** field, select **ACT! 3 - 6 Database (*.DBF)** from the list, and then locate the database file.
3. Select the database, and then click **Open**.
4. If a verification message appears, click **OK**.
5. In the **Database Conversion Wizard**, follow the instructions on the wizard pages. Click **Next** to advance through the wizard.
6. If prompted, type the ACT! 3.x - 6.x database user name and password, and then click **OK**.
7. On the **Conversion Type** page, select **Standard Conversion**, and then click **Next**.
8. On the **Specify Target Database** page, complete the fields. If more than one user has log-on privileges to the database, select the **Share Target Database** option.
9. At the message prompt, click **OK** to start the conversion. Conversion may take several minutes.
10. On the **Completing the Conversion Wizard** page, click **Details** to see the details about converted items, and then click **Finish** to close the wizard.
The database opens, and you can view the data.

To perform a Custom conversion of an ACT! 3.x - 6.x database

1. Follow steps 1 through 6 in "[To perform a Standard conversion of an ACT! 3.x - 6.x database.](#)"
2. On the **Conversion Type** page, select **Custom Conversion**, and then click **Next**.
3. On the first **Convert Contact Addresses** page, review the default field mapping for the **Main** address fields, and then do the following:
 - a. Accept the default mapping or make changes.
 - b. When finished, click **Next**.

-
4. On the next **Convert Contact Addresses** page, review the default field mapping for the **Home** address fields, and then do the following:
 - a. Accept the default mapping or make changes.
 - b. If you have custom contact address fields in your ACT! 3.x - 6.x database, select **I have more <Contact Addresses> to convert**.
 - c. When finished, click **Next**.
 - d. If you selected to convert additional fields in Step 4b, in the dialog box, type the name of the custom field, such as Vacation Home, and then click **OK**.
 The custom field is added to the database.
 - e. Map the ACT! 3.x - 6.x field from Step 4d to the new field, and then click **Next**.
 5. For the remaining Custom field conversion pages, follow Steps 4a through 4e again to convert group addresses, phone/fax numbers, and secondary contacts, if applicable.
 6. Follow the instructions on the remaining wizard pages. Click **Next** to advance.

Note: If the database you are converting has more than one user with log-on privileges, select the Share Target Database option on the Specify Target Database page.

7. At the message prompt, click **OK** to start the conversion. Conversion may take several minutes.
8. On the **Completing the Conversion Wizard** page, click **Details** to see the details about converted items. Click **Finish** to close the wizard.

Next Step

You are done! The database is ready to use. Some other items to consider:

- If you need to add to or change field mapping, you can use the Replace Field and Swap Field commands from the Edit menu to make corrections. However, you cannot replace and swap secondary contact fields.
- If you synchronize with remote databases, you must create new remote databases. For more information, see "Creating Remote Databases" in the Help.
- All users who share the database must install the ACT! Premium for Workgroups 2007 software. You can then distribute a shortcut to the .pad file for the converted database.

- You can convert supplemental files during database conversion or later using the Tools menu. Supplemental files include report templates, e-mail templates, Microsoft Word and ACT! Word Processor templates, layouts, labels, and envelopes. For more information, see "Converting ACT! 3.x - 6.x supplemental files" in the Help.

Upgrading an ACT! 2005 (7.x) or 2006 (8.x) Database

You upgrade an ACT! 2005 or 2006 database by opening it in the ACT! Premium for Workgroups 2007 software. This section gives those steps.

To upgrade an ACT! 2005 (7.x) or 2006 (8.x) database

1. Open the ACT! Premium for Workgroups 2007 software.
2. From the toolbar, click **Open Database**.
3. In the **Open** dialog box, locate the folder that contains the database, and then from the **Files of type** list, select **ACT! Database (*.PAD)** or **ACT! Database (*.ADF)**.
4. Select the database, and then click **Open**.
5. At the update prompt, click **Yes**.
6. At the backup prompt message, click **Yes**, and then complete the fields on the **Back Up Database** dialog box. Click **No** to skip the backup.

Note: Only Administrator and Manager users can back up a database. We strongly recommend that you back up your database before upgrading it.

7. If a verification message appears, click **OK**.
8. If prompted, type your user name and password for the database, and then click **OK**.
9. At the update prompt, click **OK**. If you click Cancel, the update process stops.
10. At the update process complete message, click **OK**.

WARNING: If the database you are converting was previously converted from an ACT! 6.x database, verify that the Allow history editing preference in the General tab has not changed. To do this, open the ACT! 2007 software. From the Tools menu, click Preferences. The General tab opens by default. Under General Preferences, verify the setting.

Next Step

If you do not synchronize, you are done! The database is ready to use. Make sure that all users who share the database install the ACT! Premium for Workgroups 2007 software. Then, you can distribute a shortcut to the .pad file for the database.

If you used the ACT! Network Synchronization Service or ACT! Internet Synchronization Service with the ACT! 2005 or ACT! 2006 software, you must upgrade the synchronization service software. Refer to the Knowledge Base articles to do this.

Upgrading an ACT! 2007 Database

This section gives the steps for upgrading an ACT! 2007 database to an ACT! Premium for Workgroups 2007 database. The upgrade process backs up the ACT! 2007 database, and then upgrades it.

To upgrade an ACT! 2007 database

1. Open the ACT! Premium for Workgroups 2007 software, and then click **Open Database** on the toolbar.
2. In the **Files of type** list, select **ACT! Database (PAD)**.
3. Browse to the location of the ACT! 2007 database .pad file, and then double-click it.
4. If a verification message appears, click **OK**.
5. If prompted, enter the user name and password, and then click **OK**.
6. At the **Update** prompt, click **OK**.

The update progress dialog box appears. Updating may take a few minutes.

7. When updating is complete, click **OK**.

Next Step

You are done! The database is ready to use. Make sure that all users who share the database install the ACT! Premium for Workgroups 2007 software. Then, you can distribute a shortcut to the .pad file for the database.

