

ACT! by Sage

Premium for Workgroups 2007 (9.0)
Administrator's Guide
to Silent Installation

Provided by

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ACT! by Sage Premium for Workgroups 2007 (9.0)

Administrator's Guide to Silent Installation

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With ACT! by Sage Premium for Workgroups 2007 (9.0), administrators can deploy ACT! to install on client machines without intervention. During installation, the administrator uses a command line that records the installation information so that it can be used for subsequent installations on client machines. This includes setting key preferences and activating serial numbers. The administrator also can modify the error message that users will see if a problem occurs with the install.

Note: The silent install process works with the ACT! by Sage Premium for Workgroups 2007 (9.0) (EX Edition) and ACT! by Sage Premium for Workgroups 2007 (9.0) (ST Edition) products. You need a corporate serial number.

This guide provides instructions for the silent installation process. Administrators should use this guide along with the ACT! by Sage Premium for Workgroups 2007 (9.0) *Start Here*, included on the application CD and as a printed book.

- The *Start Here* explains what is contained on the installation CDs, how to register and activate ACT!, how to install the software, how to upgrade from a previous version of ACT!, and so on.
- This guide has the following chapters:
 - This Introduction, which gives the requirements for installing the ACT! application and an overview of the process for creating and deploying a silent install
 - [Preparing the Workgroup Server](#)
 - [Installing the ACT! Application](#)
 - [Setting Preferences](#)
 - [Deploying the Silent Install](#)
 - [Uninstalling the ACT! Application Silently](#)
- This guide also has the following appendix:
 - [Configuring the SilentInst.ini File](#)

Requirements for Installing the ACT! Application

When installing ACT!, the administrator must ensure that both client and server machines meet the following requirements.

- Are running one of the following operating systems:
 - Windows XP (Service Pack 2)
 - Windows XP Home (Service Pack 2)
 - Windows XP Professional (Service Pack 2)
 - Windows 2000
 - Windows 2000 Professional (Service Pack 4)
 - Windows 2000 Server (Service Pack 4)
 - Windows 2003 Server (SP1)
- Have the .NET Framework 2.0 application.
- Have no prior version of ACT! installed.
- Are not running the following programs: ACT!, Microsoft® Outlook®, Word, Excel®, and Internet Explorer. If an open application causes a conflict, the user will see the following error message:

Installation failed. One or more applications (for example, Outlook, Word, Excel, or Internet Explorer) were open during the attempted install. Please close all applications before installing ACT! 2007.

- Have disabled personal firewall software. (Firewall software can be re-enabled after the installation is complete.)
- Are running the LanManServer service. (To check this, click Start, point to Settings, point to Control Panel, point to Administrative Tools, and then click Services. In the Name list, click Server.)
- Have no ACT instance of SQL Server™.

Installation Overview

The administrator sets up and deploys ACT! using a silent install by performing the following steps.

To perform an ACT! silent install

1. Prepare the workgroup server by installing required software. See [Chapter 1, "Preparing the Workgroup Server."](#)
2. Install the ACT! application on the workgroup server. See [Chapter 2, "Installing the ACT! Application."](#)
3. Set the preferences that silently-installed users will share. See [Chapter 3, "Setting Preferences."](#)
4. Close the ACT! application.
5. Copy files as necessary to finish the installation. See ["Finishing the installation" on page 9.](#)
6. Deploy the ACT! application to client machines. See ["Deploying ACT! to client machines" on page 10.](#)

Chapter 1

Preparing the Workgroup Server

The administrator should make sure that the workgroup server has the following applications, which are used to perform the silent install:

- Windows Installer Service, version 3.1 or later
- Microsoft Data Access Components (MDAC), version 2.81 or later
- .NET Framework 2.0

If the workgroup server does not have the required applications, install them using the following procedures.

To install the Windows Installer Service 3.1

The WindowsInstaller-KB893803-v2-x86.exe file is located in the Dependencies folder on CD1.

- Run the Windows Installer package silently on the server using the following command line:

```
WindowsInstaller-KB893803-v2-x86.exe /quiet
```

Note: Windows will automatically restart the machine after installing the update.

To install MDAC 2.81

The MDAC_TYP.exe package is located in the Dependencies folder on CD1.

1. Run the MDAC component package silent install on the server using the following command line:

```
MDAC_TYP.exe /q /c:"setup /QN1"
```

2. Restart the machine.

To install .NET Framework 2.0

The dotnetfx.exe file is located in the Dependencies folder on CD1.

- Run the .NET silent install on the server using the following command line:

```
dotnetfx.exe /q:a /c:"install /l /q"
```

Note: If errors occur, you may find helpful information on the Microsoft Web site, under "Launching a silent installation of Dotnetfx.exe" at:
http://msdn.microsoft.com/library/default.asp?url=/library/en-us/dnnetdep/html/ndp2_redis.asp

Chapter 2

Installing the ACT! Application

This chapter explains how to install the ACT! application on the workgroup server.

To install ACT! on the workgroup server

1. Insert the ACT! CD 1 into the CD drive. If the install program starts automatically, click Exit to close the install window.
2. Copy the contents of CD 1 to a network location that you can access from the workgroup server where you are installing the application. Remove the CD from the drive.
3. At the root folder where you copied the contents of CD 1, locate the SI folder. Copy this folder to the ACTWG folder.
4. Install the ACT! application, using the following command line:

```
[Drive letter]:\ACTWG\setup.exe /r /f1"c:\ISSConfig.iss"
```

Note: There is no space between "f1" and the following quotation mark.

5. Start the ACT! application.

Note: The person who starts the application the first time must be a local Windows Administrator on the machine and have Internet access to activate the ACT! software. This applies to the administrator and all users.

6. Register and activate the ACT! software. For more information, see the ACT! by Sage Premium for Workgroups 2007 (9.0) *Start Here*.
7. Set up or convert a database. For more information, see the ACT! by Sage Premium for Workgroups 2007 (9.0) *Start Here*.
8. Set preferences for client installations. See [Chapter 3, "Setting Preferences."](#)

Chapter 3

Setting Preferences

The administrator can set preferences that include the following:

- The location of personal files associated with the ACT! application.
- The background colors and fonts for calendars, lists, and other views.
- How contact names appear.
- How users are notified of new e-mail messages.

Preferences can be database-specific or machine-specific. You can specify machine-specific preferences and deploy them to client machines, but users will be able to change them.

The following sections list the preferences that the administrator can set and deploy to client machines.

General preferences

Preference Option	Description
Personal Files Locations	Sets the local path for storage of personal supplemental files, such as templates
Name - If the contact name contains more than two names (John Van Doe), automatically show the Contact Name dialog box	Whether or not to show the Contact Name dialog box when the users enters a contact name that contains more than two names

Colors and Fonts preferences

Preference Option	Description
Customize - Group List Customize - Company List	Set text color, background color, and fonts for list view for groups and companies
Show grid lines	Sets whether or not to display grid lines in list views

Calendar and Scheduling preferences

Preference Option	Description
Calendar - work days	Specify the days of the week that are workdays
Calendar - Start time/End time	Specify the work day start and end time
Calendar - First day of week	Sets the first day of the week
Calendar - First week of the year	Sets the first week of the year
Calendar - On calendars show	Show the Contact name first, Company name first, or Contact name only
Calendar - Enable popups for	Enable pop-ups for Calendar, Activity tab, Task List, or all
Calendar - Mini-calendar	When displaying the Mini-calendar, show only the current month
Calendar - Show full day banner	Show a full-day banner for activities with a duration of the specified number of days or longer
Calendar - Show Tentative activities on my calendar	Determines whether or not to show tentative activities scheduled by another user on the user's calendar
Scheduling - Activity type settings	Sets the Priority, Alarm lead time, Duration, whether to automatically display drop-downs for selected fields in dialog boxes, Timeless default, and roll-over of activities
Scheduling - When clearing activities	Sets whether or not to show cleared activities dimmed or with strike-through
Scheduling - Conflict checking	Sets whether or not to check for conflicts
Scheduling - Make new activities public	Sets whether or not to default new Activities to public (if cleared, defaults to private)
Scheduling - Create separate activities when scheduling with multiple contacts	When scheduling with multiple contacts, creates a separate activity for each contact

E-mail preferences

Preference Option	Description
E-mail system - Send e-mail to contacts using	Sets the primary e-mail account (if the user sets up multiple e-mail accounts)
E-mail system - Check spelling before sending e-mail	Whether or not to check spelling for e-mails before sending
Folder settings - Empty deleted items	Empties the deleted items folder(s) on application exit
Folder settings - When connected, notify me of messages every X minutes	Sets how often to poll for new messages
Attaching e-mails to contacts - When attaching e-mails with files	Sets prompt behavior when attaching e-mails with attached files
Composing Options - Send e-mails in	Specifies whether to send e-mail in HTML or plain text format
Composing Options - Default priority	Sets the default priority for new messages (low, normal, or high)
Composing Options - History options	Specifies the default History setting (none, subject only, subject + message, attach to contacts)
Composing Options - Request return receipt	Specifies whether or not new messages have receipts set automatically
Composing Options - Reply and forward settings	Specifies whether or not to: <ul style="list-style-type: none"> • Close original e-mail when a user replies to or forwards it • Include e-mail body when a user replies to or forwards a message • Include attachments when a user replies to a message • Include attachments when a user forwards a message
Composing Options - Use auto-fill to suggest names by	Specifies how e-mail resolves names (last name, first name, company, or e-mail address)
Composing Options - E-mail addressing and name resolution	Specifies where to search for name (contact database or e-mail system) and in what order
Composing Options - Signatures	Opens a dialog box for managing signatures

Communication preferences

Preference Option	Description
Default Word processor	Specifies the application used for generating correspondence (ACT! Word Processor or Microsoft Word)
Spelling - Always suggest replacement for misspelled words	Specifies whether or not to suggest an alternative spelling to a misspelled word
Spelling - Upon saving, check spelling for the following	Specifies whether or not to check spelling for activities, histories, notes, or opportunities before saving
Spelling - Ignore UPPERCASE words	Ignores all uppercase words, regardless of whether or not they are in the dictionary
Spelling - Ignore words with numbers	Ignores all words that contain numbers, regardless of whether or not they are in the dictionary
Spelling - Select main dictionary	Specifies a Main Dictionary, selected from the shared datastore (default) or file system
Spelling - Select user dictionary	Specifies the User Dictionary, selected from the shared datastore (default) or file system
Dialer - Use Dialer	Select to turn on the Dialer
Dialer - Modem or line	Select to specify whether the Dialer uses a modem or line
Dialer - Properties	Display the Location list
Dialer - Hide dialer after dialing	Select to hide the dialer after the call is dialed
Dialing - Start timer automatically on outgoing calls	Clear to keep the timer from starting automatically when an outgoing call is dialed
Quick Print	Opens a dialog box for specifying the format and information to be included in the header and footer for each type of quick print output

Startup preferences

Preference Option	Description
Record creation settings - Make new opportunities	Specifies whether or not to default new opportunities to public (if cleared, opportunities default to private)
Startup database	Specifies the database to open when the ACT! application is launched (last opened or selected)
Automatically check for updates every X <period>	Specifies how often to automatically check for updates each day, week, or month, as specified

For information on how to set preferences, see "About setting preferences" in Help.

Next Step

Complete and deploy the silent installation. See [Chapter 4, "Deploying the Silent Install."](#)

Chapter 4

Deploying the Silent Install

This chapter explains how to complete the installation and deploy it to client machines. It also provides information on troubleshooting errors that may occur during installation.

Finishing the installation

After setting preferences, the administrator must close the ACT! application, create or modify installation files as necessary, and then copy them to the Silent Install (SI) folder. The SI folder must contain the following:

- The si.txt file, which contains the serial number and the error message that users will see if a problem occurs during installation. (The administrator must enter the serial number and modify the error message appropriately.)
- The ISSConfig.iss file.
- The Preferences folder, which contains the preferences that can be deployed to the client machines.
- The SilentInst.ini file.

The administrator copies the si.txt file, ISSConfig.iss file, and Preferences folder to the SI folder as specified in the following procedure. (The SI folder is under the ACTWG folder. It should already contain the SilentInst.ini file.)

To modify the install files

1. Create the si.txt file in the following format, modifying it as necessary to include the actual serial number and contact information:

```
sn=00202-22022-22222-22222  
  
errorMsg=Please contact [name] [phone, e-mail address] for help  
installing ACT!.
```

Caution: Include hyphens in the serial number. Do not use equal signs in the error message text. The error message must fit on one line.

2. Save the file as si.txt in the SI folder.
3. Copy the C:\ISSConfig.iss file from the C: drive to the SI folder.
4. (Optional) Configure the SilentInst.ini file as described in [Appendix A, "Configuring the SilentInst.ini File"](#).
5. Copy the Preferences folder from C:\Documents and Settings\[User's folder]\Application Data\ACT\ACT for Windows 9\Preferences to the SI folder.

Note: This TXT file is copied to the client machines as part of the installation and provides the serial number for activation of the client machines. After installation is complete, the install process automatically deletes the .txt file from the machines.

Deploying ACT! to client machines

After installing the ACT! application and copying the appropriate files to the SI folder, the administrator can deploy the application to clients, using the method best suited to the environment.

The silent install functions properly only if the following conditions are met:

- The person who starts the ACT! application the first time *must* be a local Windows Administrator on the machine in order to activate the application. This applies to the server and each client machine. If the user who starts the application the first time is not a local Windows Administrator on the machine, the application may not function correctly.
- The client machine must have an Internet connection and be on-line when the user launches the ACT! application the first time. If not, an error message appears.
- When the silent install is a Scheduled Task, all other users must be logged off the machine.
- The machine must meet the requirements listed in the Introduction.

To run the silent install

To run the silent install, use the following command line:

```
[Network Drive letter]:\ ACTWG\setup.exe /s /f1" [Network Drive letter]:\ACTWG\SI\ISSConfig.iss" /f2"c:\installation_output.log"
```

Note: There is no space between "f1" or "f2" and the following quotation marks.

Troubleshooting errors

Users who encounter errors can check the file named installation_output.log, at the location specified in the f2 command line parameter. Result Code = 0 indicates that the installation is a success; Result Code = -3 indicates that the installation failed.

To resolve errors:

1. Check the command line for typographical errors, incorrect path name, and so on.
2. If the command line appears to be correct, check the error message log stored at the following location: C:\WINDOWS\Temp\Act9Inst\SilentInstall.txt.

Chapter 5

Uninstalling the ACT! Application Silently

This chapter explains how to uninstall the ACT! application using the silent install process. To uninstall, an administrator must create an ISSConfig.iss file on any machine with the application installed, copy it to a network directory, and then deploy that file.

Note: The silent install process works with the ACT! by Sage Premium for Workgroups 2007 (9.0) (EX Edition) and ACT! by Sage Premium for Workgroups 2007 (9.0) (ST Edition) products.

The following programs cannot be open at the time of uninstall: ACT!, Outlook, Internet Explorer, Word, and Excel. Also, if the uninstall is run as a scheduled task, no users can be logged into the affected machines, except the individual who scheduled the task.

To create the ISSConfig.iss file

1. On a PC with an ACT! application installed, click the Windows **Start** button, point to **Program Files**, and then click the version of the application to uninstall. This reveals the nested shortcuts.
2. Right-click the **Uninstall** shortcut, and then select **Properties**.
3. Select the entire contents of the **Target** field, right-click, and then select **Copy**.
4. Open a document in Notepad and then paste the target information into it. (You will use this document later in the procedure.)
5. Open a DOS window. At the command prompt, paste the target information again, and then append the path with the following:

```
/r /f1"C:\ISSConfig.iss"
```

Note: There is no space between "f1" and the following quotation marks.

6. Copy the ISSConfig.iss file from the C: drive to a network drive that can be accessed by the machines you will uninstall the ACT! application from
7. Create a batch file with the following contents:

```
[Target information from Step 4]/s /f1"[Path to ISSConfig.iss on  
Network from Step 6]" /f2"C:\ACT_Uninstall_Output.log"
```

Note: There is no space between "f1" and "f2" and the following quotation marks.

Appendix A

Configuring the SilentInst.ini File

This Appendix gives the configuration of the SilentInst.ini file.

(LocaleToInstall)

LocaleName=United States

Insert one of the following values: United States, Canada, Australia, United Kingdom, Latin America, or Europe

LocaleFolder=US

Depending on the value of LocaleName inserted above, insert the corresponding value:

- United States: US
- United Kingdom: UK
- Europe: EU
- Australia: AU
- Canada: CA
- Latin America: LA

LocaleNetSymbol=en-US

Depending on the value of LocaleName inserted above, insert the corresponding value:

- United States: en-US
- United Kingdom: en-UK
- Europe: en-IE
- Australia: en-AU
- Canada: en-CA
- Latin America: en-JM)

(LicenseAgreement)

Agree=TRUE

Must be TRUE (all caps, case-sensitive)

(SdCustomerInformation)

InstallFor=COMMON

Depending on whether the application is installed for the currently logged-in user or for All users, the options are as follows. These values are case-sensitive.

- COMMON (for all users)
- PERSONAL (for the currently logged-in user)

(IconOptions)

ShowOnDesktop=TRUE

ShowOnQuickLaunch=TRUE

These options determine whether the ACT! icon is installed on the desktop and Quick Launch bar. Enter TRUE or FALSE. The field is case-sensitive.

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