

ACT! 2012 Pro & Premium New Version Upgrade Guide



ACT! 2012 introduces expanded search tools that find data in attached documents like PDF & MS Word files. Other updates include a new Scratchpad application & integration with Google apps.

Universal Search

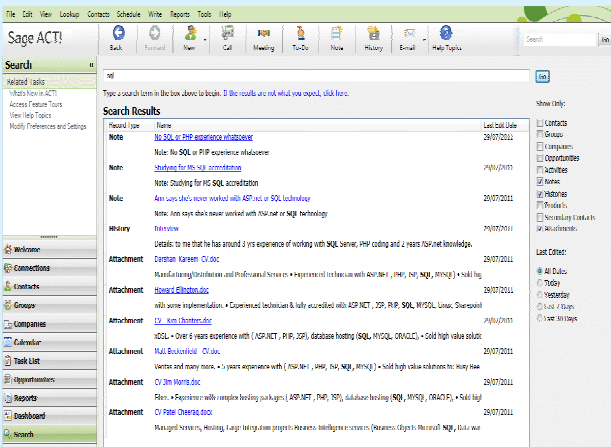
New universal searches find ACT! detail wherever it's stored including attached documents.

With more expansive searches, ACT! users keywords and phrases in attached files including:

- MS Word documents
- PDF files
- Microsoft Excel

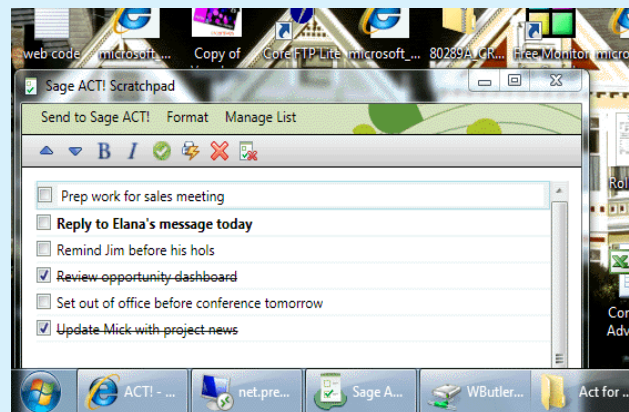
Searches can be filtered by criteria including: groups, attachments, histories, data range, opportunities and companies so you'll quickly find all the entries you want to work with.

Results are weighted so matching items can be easily browsed with drill down for further analysis.



ACT! Scratchpad

ACT! 2012 includes a new Scratchpad application enabling users to quickly jot down information and manage processes that wouldn't immediately be stored in the main ACT! database.



As a virtual ACT! notepad, the Scratchpad is used to capture impromptu notes, contact detail and personal reminders - even if the main ACT! application isn't running.

Set priorities and check-off items once completed and send Scratchpad items to ACT! as activities, notes or history entries by assigning them to contacts.

Longstanding ACT! users may remember the Scratchpad as an evolved edition of SideACT that last appeared in Version 6.

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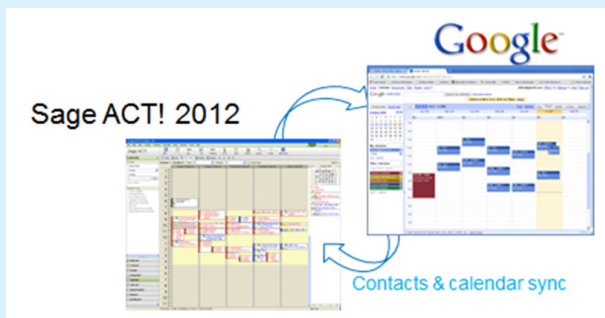
Google Integration

Google Apps users can now integrate ACT! with Gmail, Google Contacts and Google Calendar:

Gmail: Send & receive emails from Gmail or ACT! & save a history in the contact history for a complete view of all communications.

Google Contacts: Create new contacts in either Google or ACT! and synchronise your entire database, or just a subset, with Google to access contact detail in either interface.

Google Calendar: Sync ACT! and Google calendars automatically, or on-demand, and choose which ACT! activity types will sync to Google. Complete activities from either application and have updates applied when you next sync.



Extended Compatibility

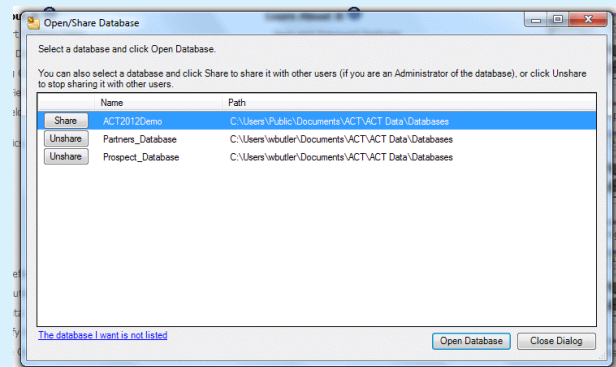
ACT! 2012 works with:

- Windows Small Business Server 2011
- Firefox 4.0
- Internet Explorer 9
- Citrix Xen 5.0 & 6.0

Database Summary

A new database summary provides clearer visibility of all available ACT! databases to help users where multiple databases exist.

The summary also enables administrators share user access from a single screen.



More Updates

Performance updates that resolve outstanding user requests including improved integration with Sage 50 Accounts

New ACT! import notifications summarising the outcome of data imports including alerts for import errors or failures.

Extra ACT! installation information shows the time until completion and required components for install. This also provides early warning of a need to reboot as part of the install process.