

Sage ACT!

Sage ACT! Premium 2013 Web Administrator's Guide

sage

Copyright © 2012 Sage Software, Inc. All Rights Reserved.

Sage, the Sage logos, ACT!, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities.

Microsoft® SQL Server®, Windows Vista® and the Windows logo are either registered trademarks or trademarks of the Microsoft Corporation group of companies in the United States and/or in other countries. All other trademarks are the property of their respective owners.

Released 08/2013 for Sage ACT! Premium 2013 (access via web)

Version: UA07_07312012

Important Note

Review Sage ACT! system requirements at www.act.com/systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Visit www.actsolutions.com or contact your add-on product provider to determine compatibility for your add-on products.

This material may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or computer-readable form without prior consent in writing from Sage Software, Inc., 1715 North Brown Road Lawrenceville, GA 30043 ATTN: Legal Department.

ALL EXAMPLES WITH NAMES, COMPANY NAMES, OR COMPANIES THAT APPEAR IN THIS MANUAL ARE FICTIONAL AND DO NOT REFER TO OR PORTRAY IN NAME OR SUBSTANCE ANY ACTUAL NAMES, COMPANIES, ENTITIES, OR INSTITUTIONS. ANY RESEMBLANCE TO ANY REAL PERSON, COMPANY, ENTITY, OR INSTITUTION IS PURELY COINCIDENTAL.

Every effort has been made to ensure the accuracy of this material. However, Sage Software, Inc. makes no warranties with respect to this documentation and disclaims any implied warranties of merchantability and fitness for a particular purpose. Sage Software, Inc. shall not be liable for any errors or for incidental or consequential damages in connection with the furnishing, performance, or use of this material or the examples herein. The information in this material is subject to change without notice.

End User License Agreement

This product is protected by an End User License Agreement. To view the agreement, go to the Help menu in the product, click About Sage ACT!, and then click the View End User License Agreement link.

Published by

Sage Software, Inc.

8800 N. Gainey Center Drive, Suite 200

Scottsdale, AZ 85258

10 9 8 7 6 5 4 3 2 1

Contents

- Introduction..... i**
- Getting Started..... 1**
- Installation and Configuration Checklists..... 7**
- Setting Up Sage ACT! Premium (access via web)..... 11**
- Integrating Sage ACT! Premium (access via web) With Other Applications..... 17**
- Troubleshooting Sage ACT! Premium (access via web)..... 23**
- Index..... 29**

Welcome to Sage ACT! Premium 2013 (access via web). Sage ACT!, the #1 Contact and Customer Management choice of small businesses and sales teams, is designed to help you build the long-lasting, profitable relationships your business thrives on.

Sage ACT! Premium (access via web) lets users access Sage ACT! Premium databases using a supported browser. It is important that you review the full system requirements and supported compatibility list at www.act.com/systreq.

Whether you are installing Sage ACT! Premium (access via web) for the first time or upgrading from an earlier ACT!, ACT! for Web, Sage ACT! Premium (Web), or Sage ACT! Premium (web client) version, this guide provides the information to:

- Plan and organize a Sage ACT! Premium (access via web) installation.
- Set up user access to Sage ACT! Premium (access via web).
- Install the Sage ACT! Scratchpad and set up integration with supported applications, such as Microsoft® Outlook® or Google®.
- Troubleshoot the software.

IMPORTANT INFORMATION TO KNOW BEFORE YOU START

To determine the guide you need to start with, see the following:

I do not have any version of ACT! or Sage ACT!, installed. I am a "New User." See the *Installing Sage ACT! 2013 for New Users* guide along with this Web Administrator's guide to complete your Sage ACT! Premium (access via web) installation. The *Installing Sage ACT! 2013 for New Users* guide provides the steps to install, register, and activate Sage ACT! Premium (access via web). The guide is included with the software and is available as a PDF on the installation panel under Product Documentation.

I have an ACT! 2005 (7.x) through Sage ACT! 2012 (14.x) version installed. I may or may not have a web version installed. See the *Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)* guide along with this Web Administrator's guide to complete your Sage ACT! Premium (access via web) installation. The *Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)* guide provides the steps to install, register, and activate Sage ACT! Premium (access via web) and upgrade your database. The guide is available as a PDF on the installation panel under Product Documentation.



Upgrade Web User. When you see this icon throughout the guide, it indicates information that is applicable to you.

I have an ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) installed. See the *Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)* guide along with this Web Administrator's guide to complete your Sage ACT! Premium (access via web) installation. The *Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)* guide provides the steps to install, register, and activate Sage ACT! Premium (access via web) and convert your database. The guide is available as a PDF on the installation panel under Product Documentation.

Adobe® Reader® is required to access and view product documentation from the installation panel.

In this section, you will learn about:

- Planning your installation, including common configuration suggestions.
- Understanding the ASP.NET Process and user impersonation account.
- Using Application pools.
- Installing Sage ACT! Premium (access via web) in single- or multiple-server configurations.
- Using the Web Site Administration tool and default virtual directory to set up and configure Sage ACT! Premium (access via web).
- Using Secure Sockets Layer (SSL) with Sage ACT! Premium (access via web).
- Working with user preferences.

This section also includes installation and configuration checklists. You can print the page for the checklist that you need.

Planning Your Installation

Sage ACT! Premium 2013 (access via web) requires Microsoft Internet Information Services (IIS) and ASP.NET to function. See Microsoft documentation to help you plan your installation and prepare your web server. You need to understand your operating system, IIS, ASP.NET, and user permissions required to run a web page.

To determine whether you will install the Sage ACT! Premium (access via web) software and the database together on one server or separate servers, consider the following:

- The number of users who require access to the database and the number of users who will access the Sage ACT! Premium (access via web) site. For recommendations, review the system requirements at www.act.com/systreq.
- How frequently this software and other services will access the server.
- Whether users need access from both inside and outside your network. If access is required from outside the network, two possible server/database configurations are:
 - Install Sage ACT! Premium (access via web) using a single-server configuration, where the web server also hosts Sage ACT! Premium (access via web) databases.
 - Install using a multiple-server configuration, where you have a web server hosting the Sage ACT! Premium (access via web) software and Internet Information Services (IIS), and a database server hosting the Sage ACT! Premium (access via web) database (including the Microsoft® SQL Server® software to manage the database). You then connect to the database from the web server. (Recommended for more than 30 users.)

Both server configurations are discussed later in this guide.

Configuration Suggestions

The following are suggestions for configuring Sage ACT! Premium (access via web). Actual results may vary depending on the size of your database and network configuration.

- Host the application server on a dedicated instance of Microsoft SQL Server.
- The database server should have 3 GB memory for every 50 users in the database. The hard drive speed is most important on this computer. With faster hard drive speeds, users may experience better performance. This computer's performance can benefit if you use 64-bit SQL Server and have quad core processors.
- The application server should have 3 GB memory for every 50 users in the database. CPU and memory are most important on this computer. With more memory, users may experience better performance.

-
- If possible, distribute mail merge and reporting tasks. On the client machine, mail merge can be the most performance consuming task. On the database server, reporting can be intensive. It is recommended that you run reports during a time when users are not logged on, such as at night.
 - If possible, put the Sync server on an out-facing machine and not on the same machine as the database. Internet sync is recommended because it is already running IIS, but you can have both Internet and Network sync set up to act as a safeguard or as a way to balance load. See "About Database Synchronization" in the Help for more information about Internet and Network Sync.

Understanding the ASP.NET Process and Impersonation User Accounts

An ASP.NET process account is required for ASP.NET to function. It is usually managed by Windows®, and it requires the permission: Impersonate a client after authentication. The default account name varies, depending on the operating system on your web server. The Web Site Administration tool lets you test the ASP.NET process account to verify it exists and is properly configured. For more information about configuring and troubleshooting the ASP.NET process account and service, see the Sage ACT! Knowledgebase at www.act.com/support.

The Sage ACT! Premium (access via web) software uses ASP.NET to access the database and other files. You create a Windows user account, and then use the Web Site Administration tool to configure the software to use that account. An impersonation account is required to let a user who does not have access to the network impersonate a user who does. This gives an ASP.NET application access to Windows resources using the account you provide.



Upgrade Web User. You may not need to create a new impersonation user for Sage ACT! Premium 2013 (access via web). The impersonation user assigned in your previous Sage ACT! Premium (web client) or ACT! Premium for Web version should be retained and usable after upgrading the software.

Using Application Pools

An Internet Information Services (IIS) application pool is used to isolate ASP.NET web applications and help increase the stability and security of the applications. An application pool can include one or more applications. You can configure the level of isolation between them. For example, you can create an application pool for each application running on the same computer. If errors occur in one pool, they will not affect applications running in other pools. Sage ACT! uses the default application pool named DefaultAppPool. You can create a custom application pool for Sage ACT! Premium (access via web). If you do create a custom application pool for Sage ACT! Premium (access via web), be sure to select the Use Default Settings option. Otherwise, Sage ACT! Premium (access via web) users may receive errors or be disconnected when accessing the web site.

Each application pool has one or more *worker processes*. A worker process is a process that runs the web site. The worker processes are unique to the application pool and are not shared across application pools. A worker process is responsible for handling requests sent to a web server for a specific application pool.

Application Pool Recycling

Application pools can be periodically recycled to avoid unstable states that can lead to application crashes, hangs, or memory leaks. By default, Microsoft sets application pool worker processes to recycle every 29 hours or 1,740 minutes.

Note: We recommend that you reset the default recycling interval for the application pool assigned to Sage ACT! Premium (access via web) to recycle every 24 hours or 1,440 minutes. To do this, see "[Changing the Default Recycling Interval for an Application Pool](#)" on page 21.

If desired, you can perform an on-demand recycle. For Sage ACT! Premium (access via web), an on-demand recycle is recommended after web users have installed the Sage ACT! Scratchpad and/or configured integration with Google or Outlook. For steps on how to perform an on-demand recycle, see ["Recycling an Application Pool" on page 21](#).

For more information about application pools, see Microsoft documentation.

Installing in Single- or Multiple-Server Configurations

The following explains the differences and recommendations for installing Sage ACT! Premium (access via web) in single- or multiple-server configurations.

Single-Server Configurations

You can install Sage ACT! Premium (access via web) using a single-server configuration, where the web server also hosts the database.

Note: If you are also using Sage ACT! Premium (Desktop) version, you cannot install Sage ACT! Premium (access via web) on the same server.

To deploy Sage ACT! Premium (access via web) in a single-server configuration, the impersonation user account you create should:

- Be added to the local Administrators group.
- Have permission to access the Sage ACT! Premium (access via web) database and database supplemental files.

Multiple-Server Configurations

For scalability and enhanced performance, you can configure Sage ACT! Premium (access via web) to use multiple servers. The most common types of server configurations used are:

- One web server and one database server.
- Multiple web servers (with or without a database server).
- One or more web servers running multiple application pools. For more information about managing application pools in IIS, see Microsoft Help.

For a multiple-server configuration, the impersonation user account you create should:

- Be a standard domain user.
- Be added to the local Administrators group on all servers that are part of the Sage ACT! Premium (access via web) deployment.
- Have permission to access the database supplemental files for your Sage ACT! Premium (access via web) database on the database server.
- Have permission to access all Sage ACT! Premium (access via web) files on the web server.

You may have two or more instances of Sage ACT! Premium (access via web) hosted on one web server. In such cases, you can use virtual directories or application pools to distinguish and secure each Sage ACT! Premium (access via web) web site.

Multiple Virtual Directories

You can create multiple virtual directories within your default web site. For example, you may have two directories — one called Sales and one called Service. Sage ACT! Premium (access via web) users access the sites using a URL followed by the virtual directory name (for example, <http://domain.com/sales>). You point each virtual directory to the Sage ACT! Premium (access via web) installation directory. The installation directory differs for your operating system.

TIP: For more information about configuring Sage ACT! Premium (access via web) using multiple virtual directories, see the Knowledgebase Article #14868.

Recommendations When Installing in Multiple-Server Configurations

The following are recommendations when installing Sage ACT! Premium (access via web) in a multiple-server configuration :

- If you have more than 50 users on a single web server, use multiple application pools.
- You may have two or more instances of Sage ACT! Premium (access via web) hosted on one web server. In such cases, you can use virtual directories or application pools to distinguish and secure each Sage ACT! Premium (access via web) site. You should also isolate any supplemental data for each web site.
- Disable all unnecessary Windows services on the web server, such as Network News Transfer Protocol (NNTP) or File Transfer Protocol (FTP).
- Allow access through the firewall only to the web server. Do not allow access to the database server. See your firewall documentation for instructions.
- When using more than one web server, you can set Sage ACT! Premium (access via web) user preferences to be shared across multiple web servers. For more information, see "[About User Preferences](#)" on the facing page.

Using the Web Site Administration Tool

The Web Site Administration tool, located on the Tools menu in the Sage ACT! Premium server application, contains several tabs for configuring Sage ACT! Premium (access via web).

Web Server tab. Use to test that your ASP.NET process account exists and the service is started.

User Account tab. Use to specify and test the Windows user account for ASP.NET impersonation.

Add/Remove Database tab. Use to assign or remove a Sage ACT! Premium database to or from your virtual directory.

Options tab. Use to change the session timeout limit for Sage ACT! Premium (access via web) users. By default, the timeout limit is set to 20 minutes.

The Web Site Administration tool also does the following:

- Encrypts the user name and password.
- Sets up ASP.NET impersonation using the specified user.
- Verifies that the impersonation user can access the required files and folders.
- Verifies that the ASP.NET process account has access to the registry key required to run Sage ACT! Premium (access via web).

About the Default Virtual Directory

During installation, Sage ACT! Premium (access via web) creates a default virtual directory called "apfw". Users will need this default virtual directory name and the URL of your web server to access the product. For example, if the name of your web server URL is "salesweb", users will access the product with the address of "http://salesweb/apfw".

On the Add/Remove Database tab of the Web Site Administration tool, you assign Sage ACT! Premium databases to this virtual directory. Then, users can open their web browser and type in the web address to open the product and log on to an assigned Sage ACT! Premium database. You can test whether your configuration can access the files and folders required for Sage ACT! Premium (access via web). You should do this test whenever you make changes to the configuration, such as adding or removing databases or changing passwords.

You can find additional information about Sage ACT! Premium (access via web) and the Web Administration tool in Knowledgebase articles at www.act.com/support.

Using Secure Sockets Layer (SSL) with Sage ACT! Premium (access via web)

Secure Sockets Layer (SSL) uses an encryption key to encrypt data between a web server and client so that others cannot access it. You may want to configure SSL in your version of IIS if you plan to integrate Sage ACT! Premium (access via web) with another application, such as Outlook. With SSL, communications between Sage ACT! Premium (access via web) and Outlook are secure. In IIS, you specify which portions of your Default Web Site to secure with SSL. You can secure the entire Default Web Site or only a specific virtual directory or page.

Consider the following scenarios:

- If your web server only hosts Sage ACT! Premium (access via web), you can use SSL to secure the entire Default Web Site. The Sage ACT! Premium (access via web) logon page and all child pages will be secured with SSL. You must precede all URLs with "https" rather than "http."
- If other web pages are hosted on your web server, you can use SSL to secure only the virtual directory where the Sage ACT! Premium (access via web) software logon page is set up. The logon page and all pages within Sage ACT! Premium (access via web) will be secured with SSL. You must precede all URLs with "https" rather than "http."

Best practices if you plan to use SSL with Sage ACT! Premium (access via web):

- Add an exception for port 443 (the default port for SSL).
- If you plan to integrate with another application, such as Outlook, open the Web.config located at \\<install folder>\ApfwoutlookSrv\ and comment out the UnSecured section and uncomment the Secured one. See "[Editing the Outlook Service Web.config File to Use a Secured Service](#)" on page 17.
- Have caching of encrypted pages/files turned On. Users accessing the web site will need to check their browser settings to allow caching. See "[Browser Requirements for Sage ACT! Premium \(access via web\) Users](#)" on page 15.

To configure SSL on IIS, see Microsoft documentation.

About User Preferences

Sage ACT! Premium (access via web) stores user preferences in a WebPreferences.xml file on the web server that hosts the product. Preferences let users customize name and salutation settings, change background colors and fonts, create custom spelling check dictionaries, and set other options for how they use Sage ACT! Premium (access via web). In some cases, you may want to distribute web requests across multiple web servers. If you do this, each web server will have a unique set of stored user preferences. If a user changes a preference when logged onto server 1, that change will not be reflected on server 2.

To make sure users have the same settings, you can set up a shared location to store user preferences. Then, when a user logs on, their user preferences will be the same no matter what server responds to their logon request.

Depending on your operating system, user preferences are stored at:

- \\Windows\System32\inetsrv\ACT\ACT for Web\Preferences
- \\Users\[*Impersonation User*]\AppData\Roaming\ACT\ACT for Web\Preferences.



ACT! for Web 2005 or 2006 Upgrade Users Only. Because the storage location for user preferences changed after the ACT! for Web 2006 release, some preferences may be lost after upgrading. To restore these user preferences, copy all files and folders from the old preference location to the new preference location and reset IIS. See Help for steps on how to reset IIS.

The steps to set up a shared location for user preferences is explained in "[Setting Up Shared Preferences Across Web Servers](#)" on page 14.

Installation and Configuration Checklists

The following installation and configuration checklists outline the tasks to install and configure Sage ACT! Premium 2013 (access via web). Follow the checklist for your user type.

New User Installation and Configuration Checklist

The guides you will need to complete your installation and configuration are:

- *Installing Sage ACT! 2013 for New Users* for Tasks 2 - 4.
- *Sage ACT! Premium 2013 Web Administrator's Guide* for Tasks 1, 6-10.

	Task	Guide	Page #
1	Determine whether you will use a single-server or multiple-server configuration.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	3
2	Prepare to install. Important: Be sure to complete both sets of steps.	<i>Installing Sage ACT! 2013 for New Users</i>	2-3
3	Install, register, and activate Sage ACT! Premium (access via web).	<i>Installing Sage ACT! 2013 for New Users</i>	4-7
4	Create a shared database and add users to it.	<i>Installing Sage ACT! 2013 for New Users</i>	8-9
5	Install Sage ACT! Sync Services.	"Installing Sync Services" in Help	
6	Create a Windows user account for ASP.NET impersonation.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	11
7	Use the Web Site Admin tool to configure the web site. Provide users with access information.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	12
8	Set up shared preferences across web servers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	14
9	Have users configure supported browsers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	15
10	Have users integrate Sage ACT! Premium (access via web) with other applications. Important: Be sure to recycle the application pool after users have installed integration components.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	17

Upgrade from ACT! 2005 (7.x) - 2011 (13.x) Installation and Configuration Checklist

The guides you will need to complete your installation and configuration are:

- *Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)* for Tasks 2-6
- *Sage ACT! Premium 2013 Web Administrator's Guide* for Tasks 1, 7-12

Task		Guide	Page #
1	If no previous Web installation, determine whether you will use a single-server or multiple-server configuration	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	3
2	Understand what happens during the upgrade process.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)</i>	ii
3	Prepare to install. Important: Be sure to complete both sets of steps	<i>Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)</i>	1
4	Install, register, and activate Sage ACT! Premium (access via web).	<i>Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)</i>	3
5	Upgrade the database. Important: Ensure the database remained shared. If not, share it.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)</i>	4
6	Install Sage ACT! Sync Services. Note: If you used previous versions of ACT! Sync Services, you must uninstall them and install the versions that work with Sage ACT! Premium 2013.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 2005 (7.x) - 2012 (14.x)</i>	9
7	If no previous Web installation, create a Windows user account for ASP.NET impersonation.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	11
8	Use the Web Site Admin tool to verify/configure the web site and provide users with access information.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	12
9	ACT! for Web 2005 or 2006 users only: Copy files and folders for user preferences.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	5
10	Set up shared preferences across web servers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	14
11	Have users verify/configure supported browsers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	15
12	Have users integrate Sage ACT! Premium (access via web) with other applications. Important: Be sure to recycle the application pool after users have installed integration components.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	17

Upgrade from ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) Installation and Configuration Checklist

The guides you will need to complete your installation and configuration are:

- *Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)* for Tasks 2-7
- *Sage ACT! Premium 2013 Web Administrator's Guide* for Tasks 1, 8-12

	Task	Guide	Page#
1	Determine whether you will use a single-server or multiple-server configuration	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	3
2	Prepare the database for conversion.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	1
3	Prepare to install. Important: Be sure to complete both sets of steps	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	2
4	Install, register, and activate Sage ACT! Premium (access via web).	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	3
5	Convert the database. Important: Ensure you select the "Share Target Database" option.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	5
6	Convert supplemental files.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	6
7	Install Sage ACT! Sync Services.	<i>Upgrading to Sage ACT! 2013 from ACT! versions 3.x, 4.x, 5.x (2000), or 6.x (2004)</i>	9
8	Create a Windows user account for ASP.NET impersonation.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	11
9	Use the Web Site Admin tool to configure the web site. Provide users with access information.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	12
10	Set up shared preferences across web servers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	14
11	Have users configure supported browsers.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	15
12	Have users integrate Sage ACT! Premium (access via web) with other applications. Important: Be sure to recycle the application pool after users have installed integration components.	<i>Sage ACT! Premium 2013 Web Administrator's Guide</i>	17

Setting Up Sage ACT! Premium (access via web)

Administrators must perform several steps to set up and configure Sage ACT! Premium (access via web). Users must configure a supported browser and get the web address URL from the Administrator. In this section, Administrators will learn how to:

- Create a Windows user account for ASP.NET impersonation.



Upgrade Web User. You will have a Windows user account for ASP.NET impersonation already set up for your existing ACT! web site. This impersonation user should not be affected during upgrade or previous version uninstall. You may want to test the Windows user account after upgrading.

- Use the Web Site Administration tool to set up access to Sage ACT! Premium (access via web).
- Provide access to the software from inside and outside a common network.
- Set up shared user preferences across web servers (optional).

In addition, users will learn how to configure supported browsers to allow access to Sage ACT! Premium 2013 (access via web).

Creating a Windows User Account for ASP.NET Impersonation

The following section explains how an Administrator creates a Windows user account for ASP.NET impersonation. In a multiple-server configuration, the impersonation user account should:

- Be a standard domain user.
- Be added to the local Administrators group on all servers that are part of the Sage ACT! Premium (access via web) deployment.

Note: Depending on your operating system, the following steps may differ.

Create a Windows user account for ASP.NET impersonation

1. To create a new user account, open **Local Users and Groups**. Specific steps to do this depend on your operating system. For example, on Windows Server® 2008, you can use the Server Manager>Configuration menu to access Local Users and Groups.
2. Expand **Local Users and Groups**, and then click the **Users** folder.
3. Use your operating system's menus to create a new user. For example, on Windows Server 2008, you click the **Action** menu, then click **New User**.
 - a. Type a **User name** (this would be the user's logon name, for example, "sageactimpersonator") and a **Full name** (this can be the same as the User name).
 - b. Type a password and confirm it.
 - c. Clear the **User must change password at next logon** check box.
 - d. Click **Create**. Then, click **Close**.
 - e. Write down the User name and password because you will need it later when you use the Web Site Administration tool to test the impersonation user.

Next, add the new user to a group that has access permissions. For the impersonation account, add it to the Administrators group.

4. Right-click on the name of the user you created. Click **Properties**. (The step might differ for your operating system.)
 - a. In the **Properties** dialog box, click the **Member Of** tab. Click **Add**.
 - b. In the **Select Groups** dialog box, in the **Enter the object names to select** box, type the word **Administrators**.
 - c. Click **Check Names** to resolve the Administrator's group. (The group name will appear underlined.)
 - d. Click **OK**.
5. Close all dialog boxes.

Using the Web Site Administration Tool

The next section describes how an Administrator uses the Web Site Administration tool to perform three configuration tasks to set up Sage ACT! Premium (access via web). You do not need to exit the tool as you move through the tabs to complete the setup.



Upgrade Web User. If you removed the database from your ACT! web site before upgrading to Sage ACT! Premium 2013 (access via web), you will need to assign the upgraded database to the web site so that users can access it.

For the first task, an Administrator must validate that an ASP.NET process account exists and is correctly configured on the web server.

Note: To access this feature, you must be running Windows as an administrator or disable User Access Control (UAC). See your operating system's help for how to do these tasks first.

Test the ASP.NET process account

1. On the **Tools** menu, click **Web Site Administration**.
2. On the **Web Server** tab, click **Test**. A message appears.
 - If the test is successful, click **OK**.
 - If the test is not successful, an error message appears. This may indicate that an ASP.NET process account does not exist or is incorrectly configured. Click **OK** to close the message. For help, see "[Troubleshooting Sage ACT! Premium \(access via web\)](#)" on page 23.

Correct any errors and repeat step 2 until the test is successful. The test must be successful before you can access the User Account tab.

The second task is to specify and test the Windows user account for ASP.NET impersonation.



Upgrade Web User. Your existing Windows user account for use in ASP.NET impersonation that you set up for your Web version should be available after installation. You will not need to click Edit or make changes. Proceed to the test step. If the test is not successful, you may have to create a new Windows user account for ASP.NET impersonation.

Specify and test the Windows user account for ASP.NET impersonation

1. Click the **User Account** tab.
2. Click **Edit**.
 - a. From the **Windows Domain** list, select the domain for your impersonation user. (Your domain may already appear in the list.) If you receive an error message that the Web Site Administration tool is unable to access the Windows domain, the Windows User Name does not exist, or you entered an invalid password, correct the errors, and try again.
 - b. Type the user name and password you set up for the Windows user account. Click **OK**.

3. Click **Test**. A message appears.
 - If the test is successful, click **OK**.
 - If the test is not successful, or the ASP.NET process account does not have the required access to the registry key, an error message appears. This may indicate that the impersonation user does not have the required access to files and folders. Click **OK** to close the message. For help, see "[Troubleshooting Sage ACT! Premium \(access via web\)](#)" on page 23.

If necessary, correct errors and repeat the steps until the test is successful. The test must be successful before you can access the Add/Remove Database tab.

The final task is to assign a Sage ACT! Premium (access via web) database to a virtual directory. By default, during installation, a virtual directory called "apfw" was created.

Assign a database to a virtual directory

1. On the **Add/Remove Database** tab, in the **Web site** list, the name **Default Web Site** appears. This means the application is looking in the Default Web Site directory of IIS. If you created a custom web site, select it from the list.

A list of available virtual directories for the selected web site appears in the Virtual directories box.
2. In the **Virtual directories** box, by default, **APFW** appears for Default Web Site. If you have a custom web site and virtual directory, select the virtual directory from the list.
3. To add a Sage ACT! Premium database to the virtual directory, click **Add**.
 - a. Browse to the Sage ACT! Premium database to associate with your selected virtual directory. Click **OK**.
 - b. When prompted to log on, enter your user name and password. Click **OK**.
 - c. A Test is Successful message should appear. If it does not appear, click **TestDB**.
 - If the test is successful, click **OK**.
 - If the test is not successful, an error message appears. This may indicate that the impersonation user account does not have the required access. Click **OK** to close the message. For help, see "[Troubleshooting Sage ACT! Premium \(access via web\)](#)" on page 23.

Changing the Session Timeout Limit

If desired, you can change the default session timeout limit which controls how long users can be idle and remain logged on to Sage ACT! Premium (access via web). The default setting is 20 minutes. For security purposes, we recommend a maximum limit of two hours.

Change the session timeout limit

1. On the **Options** tab, from the **Session timeout** list, select a timeout limit. Click **Apply**.
2. If a message appears, click **Yes** to continue.
3. Click **Close**.

Microsoft IIS services are automatically restarted so the new session timeout limit can take effect.

How Users Access Sage ACT! Premium (access via web)

For users to have access to Sage ACT! Premium (access via web), an Administrator must add them to the database and assign them a user role. The number of users is dependent on the purchased licenses and how many users have "Active" status. For more information on adding users, see "Adding, Editing, or Deleting Users" in Help.

Then, provide the web address for Sage ACT! Premium (access via web) to users. This address consists of the virtual directory name appended to the web site URL.

Access from Inside a Common Network

If the web server and users are on a common network, users can access the software using the network computer name of the web server. In the two examples below, that name is "salesweb" and "teamwebserver."

Examples are:

- http://salesweb/apfw, where "salesweb" is your site URL, and "apfw" is the virtual directory name
- http://teamwebserver/apfw

Access from Outside a Common Network

Users cannot use the network machine name to access the software from outside the common network. Instead, provide an external IP address or a URL for a registered domain name. In the examples below, that information is "12.129.78.35" or "www.yourcompanyname.com."

Examples are:

- http://www.xxx.com:8080/apfw, where "www.xxx.com" is your site domain name and "8080" is the port number used to access the site
- https://www.xxx.com:443/apfw, where "www.xxx.com" is your site domain name and "443" is the secured port used to access the site
- http://12.129.78.35/act, where "12.129.78.35" is the external IP Address
- http://www.yourcompanyname.com/apfw

Setting up external Internet access to Sage ACT! Premium (access via web) may require additional configuration. Refer to Microsoft IIS Help or contact your Internet Service Provider for assistance.

Setting Up Shared User Preferences Across Web Servers

The following section explains how to set up a shared location to store user preferences for Sage ACT! Premium (access via web) users. You would want to do this if you distribute web requests across multiple web servers.

Note: If the shared preference storage location is offline when a user logs on to Sage ACT! Premium (access via web), the preferences that are stored locally on the user's system are accessed for the duration of the session.

Set up shared user preferences

1. Identify the web servers that host Sage ACT! Premium (access via web).
2. Verify that the impersonation user is the same for each web server in the cluster.
3. Select a computer that all of the web servers can access (for example, Preference_Server).
 - a. On this computer, create and name a folder to store the shared preferences. (For example, SharedPrefs.)
 - b. Share the folder you created. Grant Change and Read permission to your impersonation user account.

4. On a web server in the cluster, locate and open the **web.config** file for the APFW virtual directory. By default, this file is located at \\Program Files\ACT\ACT for Web\APFW.

Note: You can open the web.config file in Notepad. If you have the Folder Option set to Hide Extensions for known file types, this file appears as "web".

- a. In the web.config file, locate the Preferences Shared Network Folder entry shown below.

```
...
<!--
Shared network folder to store preferences (cluster setup) Leave this value
empty if single web server
-->
<add key="PreferencesSharedNetworkFolder" value="" />
```

- b. Edit the entry by inserting the UNC path to your shared folder between the quotation marks following `value=`. For example, if your server name is Preference_Server, and your folder name is SharedPrefs, then you would insert \\Preference_Server\SharedPrefs, as shown below.

```
... <!-- Shared network folder to store preferences (cluster setup) Leave
this value empty if single web server --> <add
key="PreferencesSharedNetworkFolder" value="\\Preference_Server\SharedPrefs"
/> ...
```

- c. Save and close the **web.config** file.

5. Repeat Steps 4a-c on the remaining web servers in the cluster. If all web servers in the cluster use the same configuration, you can copy the modified web.config file to the other web servers.

Tip: You can use Windows Distributed File Services (DFS) to replicate one web.config file across all servers. See Windows documentation for help.

Configuring Supported Browsers (Web Users)

To open Sage ACT! Premium (access via web), users must have a supported web browser. Currently, the supported browsers are Microsoft Internet Explorer® and Mozilla® Firefox®*. To see supported versions, go to www.act.com/systreq. For Sage ACT! Premium (access via web) to function properly, each browser has required settings. In addition, depending on your browser choice, some Sage ACT! Premium (access via web) features are not available.

The following sections describe the required settings and feature limitations for each browser.

*Mozilla and Firefox are registered trademarks of the Mozilla Foundation.

Required Browser Settings

To access and use Sage ACT! Premium (access via web) with a supported browser, the following settings are required.

Internet Explorer Settings

General tab:

- Under **Browsing History**, click **Settings**. Select Check for newer versions of stored pages **Automatically**.

Security tab:

- Under **Trusted Sites**, click **Sites** and clear **Require server verification (https:) for all sites on this zone**.
- To the list of trusted sites, add Sage ACT! Premium 2013 (access via web) and about: internet.⁽¹⁾

(1) Required for Web Help to open on Windows® Server® 2003 or Windows Server 2008. The Help file is an uncompiled Web Help system which includes the Mark of the Web (MOTW) setting in each Help topic (.htm). The MOTW setting has the "about:internet" text embedded into each Help topic.

Security tab:

- Use the Default Level for security (Low).
- Click **Custom level** and enable (or set to prompt) **Initialize and script ActiveX controls not marked safe for scripting**(2) and **Drag and drop or copy and paste files** (allows access to Windows clipboard).

Privacy tab:

- Click **Advanced**. Enable **Override automatic cookie handling**, **Accept First-Party Cookies**, and **Accept Third-Party Cookies**.
- Clear **Turn on Popup Blocker**.

Advanced tab:

- If your Sage ACT! Premium (access via web) web site is configured to use Secure Sockets Layer (SSL), under **Security**, clear **Do not save encrypted pages/files to disk**. It is best practice to have caching of encrypted pages/files turned on when using Sage ACT! Premium (access via web) over SSL.

Firefox Browser Settings

Privacy panel:

- Under **History**, from the **Firefox will** list, select **Use custom settings for history**.
- Select **Accept cookies from sites** and **Accept third-party cookies**.

Content panel:

- If selected, clear **Block pop-up windows**.
- Click **Exceptions** and add the Sage ACT! Premium (access via web) site domain to the list.
- Select **Enable JavaScript**.

If your Sage ACT! Premium (access via web) web site is using Secure Sockets Layer (SSL), ensure the caching for SSL is set to "True".

1. Open Firefox and in the address bar of the browser, type **about:config**.
2. Scroll down to **browser.cache.disk_cache_ssl**, and double-click it to change the setting:
 - "True" indicates SSL content will be cached.
 - "False" indicates SSL content will not be cached.

Browser Limitations

Each supported browser has limitations when used with Sage ACT! Premium (access via web). This means there are certain features or functions you cannot perform in Sage ACT! Premium (access via web).

Internet Explorer

- View Source function is not available.
- Right-click shortcut menu is not available

Firefox

- The ACT! Word Processor is not available.
- Mail Merge is not available.

(2) Configuring ActiveX® security is required to allow install of word processing controls to create templates and documents. Users need to install two ActiveX controls. If your client-side web security policies prohibit users from installing ActiveX controls, add both the domain associated with your Sage ACT! Premium (access via web) server installation and Microsoft.com to the Trusted Sites zone in Internet Explorer. Configure Internet Explorer to prompt users when installing ActiveX controls only for sites in the Trusted Sites zone. Doing this bypasses the ActiveX security constraints only for the necessary controls.

Integrating Sage ACT! Premium (access via web) With Other Applications

You can integrate Sage ACT! Premium (access via web) with:

- The Sage ACT! Scratchpad.
- Microsoft Word, Outlook, Word, and Excel®.
- Google.

The Sage ACT! Scratchpad is a separate application that lets users enter and manage tasks, to-do items, and more. They can enter personal or work-related items in the Sage ACT! Scratchpad and create notes, histories, and activities in Sage ACT! Premium (access via web) from items entered. Integration with the Sage ACT! Scratchpad requires that users must install Sage ACT! Scratchpad to place an icon on their desktop. Users open Sage ACT! Scratchpad and set their Send to Sage ACT! preferences to specify a database to receive the note, history, or activity.

Integration with Word, Outlook, and Google requires configuration by an Administrator and users. Some of the Administrator tasks must be done before users can set up integration with other applications. Integration with Excel does not require any configuration; however, all Microsoft applications must be installed on the computer prior to installing Sage ACT! Premium 2013 (access via web).

This section explains the Outlook and Google requirements as well as the tasks for an Administrator and users to set up integration with other applications.

Tasks an Administrator can do before users set up integration are:

- Edit the Outlook Service web.config file to use a secured service if you have configured IIS to Secure Sockets Layer (SSL).
- Edit the web.config file to allow users access to Outlook from outside the network.

Tasks a user can do are:

- Install the Sage ACT! Scratchpad and set Send to Sage ACT! preferences.
- Install the Microsoft Word component.
- Install the integration component to use with Outlook integration (email, contacts and calendar sync) or Google integration (contacts and calendar sync and Gmail record history).

After users have installed the integration component and set up their integration preferences with either Outlook or Google, an Administrator can recycle the Sage ACT! Premium (access via web) application pool so that the application refreshes and integration tools and menus are available.

Editing the Outlook Service Web.config File to Use a Secured Service

The following steps explain how to comment out the unsecured section and uncomment the secured section of the web.config file so that you can securely use Outlook integration. You must have already configured IIS to use Secure Sockets Layer (SSL).

Edit the web.config file to use a secured service

1. Navigate to the web.config file located under <install folder>\ApfwoutlookSrcv.
2. Select the web.config file and open it in Notepad.
3. To comment out the unsecured section, locate the following text:

```
<!-- Following is UnSecured Configuration. -->
<services>
```

4. Comment out <services> so that it looks like this:

```
<!--<services>
```

-
5. To uncomment the secured section, locate the following text:

```
<!-- Following is SSL Secured Configuration. Please comment Unsecured
Configuration above and un-comment SSL secured configuration below in order
to enable Security over SSL -->
<!--<services>
```

6. Uncomment `<!--<services>` so that it looks like this:

```
<services>
```

7. Save the file.

Editing the Web.config File for Outlook Integration

The following steps explain how to edit the web.config file located under the APFW directory to allow users access to Outlook from outside the network.

Note: You must also configure your firewall to permit access from outside the network. For more information, see your firewall documentation.

Edit the web.config file

1. Navigate to the APFW folder on the server where Sage ACT! Premium (access via web) is installed. By default, the file is located at `\\Program Files\ACT\Act for Web\APFW`.
2. Select the **web.config** file. Open it in Notepad.
3. Locate the **Act.Web.OutlookWebServiceAddress** parameter, which looks similar to the following:

```
<add key="Act.Web.OutlookWebServiceAddress" value="http:/
/www.xxx.com:8080/apfw"/>
```

4. Replace the text following "value=" with the IP address or domain name for the Sage ACT! Premium (access via web) site.
5. On the **File** menu, click **Save**.

After editing the web.config file, let users know they can install the integration component.

Installing the Sage ACT! Scratchpad

The following steps explain how a user installs the Sage ACT! Scratchpad to use it with Sage ACT! Premium (access via web). It only needs to be installed once.

Install Sage ACT! Scratchpad

1. On the **Tools** menu, click **Install Sage ACT! Scratchpad**.
2. At the message prompt, click **Yes**.
3. On the dialog box that appears, click **Save** to save the compressed (.zip) file to a location on your computer. For example, save it to the Desktop.
4. When the process is complete, extract the files. Use a program like WinZip® to extract the files.
5. Double-click the **setup.exe** file to install the Sage ACT! Scratchpad. Select or accept all actions required for your operating system to install it.

After installation, a shortcut named Sage ACT! Scratchpad (Web) is placed on your desktop. Double-click the shortcut to open Sage ACT! Scratchpad.

Next Step

- Open Sage ACT! Scratchpad and set your Send to Sage ACT! preferences. For more information, see "Setting My Send to Sage ACT! Preferences" in Help.

Installing a Mail Merge Component to Use Microsoft Word

The following steps explain how users can install a mail merge component to use Microsoft Word for creating letters and other documents, and performing mail merges from Sage ACT! Premium (access via web). If users plan to use the ACT! Word Processor instead of Word, skip this installation.



Upgrade Web User. To record history and edit Word documents, users must first uninstall the existing Mail Merge component, and then download and install the current version of the component. Use Add/Remove Programs to uninstall the existing version.

Install the Mail Merge component to use Microsoft Word

1. Close Word.
2. Open Sage ACT! Premium (access via web).
3. On the **Tools** menu, click **Preferences**.
4. Click the **Word Processor** hyperlink.
5. In the **Word Processor Preferences** dialog box, select **Microsoft Word** from the list.
6. Click the **Download** button.

Note: If the integration component cannot be downloaded, check to see if the Sage ACT! Premium (access via web) site URL is added to the Trusted Sites zone.

7. When prompted to run or save the file, click **Run**. Follow all remaining prompts to install the integration component. Click **Finish**.
8. Click **OK**.

Setting Up Integration with Outlook or Google

Users can integrate Sage ACT! Premium (access via web) with Microsoft Outlook or Google. Integration allows Sage ACT! Premium (access via web) to add to and use features of Outlook or Google, such as:

- Outlook email including Sage ACT! address books (contacts) and Quick Attach for emails.
- Outlook calendar and/or contacts synchronization.
- Google integration including calendar and/or contact synchronization and recording history of Gmail messages to contacts.

Users can install the integration component once to use it with either Outlook or Google.

Note: Users should synchronize their calendar and contacts with either Outlook or Google, but not both. Synchronizing with both applications may cause duplicate data.

The following sections describe the integration requirements and how users can install the integration component.

Outlook Integration Requirements

To set up the integration connection between Sage ACT! and Outlook, users need:

- A compatible version of Microsoft Outlook. For supported versions, see system requirements at: www.act.com/systreq.
- Outlook installed and working correctly.
- An Outlook profile set up.

Google Integration Requirements

To set up the integration connection between Sage ACT! and Google, users need:

- Internet access to a Google account.
- A Google account username and password.
- Authorization for Sage ACT! to access the Google account.

-
- To have logged on to their Google calendar at least once before setting up calendar integration with Sage ACT!.
 - (Recommended) Google added to their web browser's Trusted Sites list.
 - .NET Framework 4.0. If .NET Framework is not detected, it will be installed with the Google Integration components.

Installing the Integration Component

Users only need to install the integration component once to use it with either Outlook or Google.

Install the integration component

1. Close the application to integrate with. For example, if users plan to integrate with Outlook, close it.
2. Open Sage ACT! Premium (access via web).
3. Depending on the task users are attempting, have them do one of the following:
 - If users are setting up Outlook email: On the **Tools** menu, click **Preferences**. Click the **E-mail** hyperlink. Then, in the **E-mail Integration** box, click the **Download** button.
 - If users are setting up Outlook contacts/calendar sync: On the **Tools** menu, click **Preferences**. Click the **Outlook Synchronization** hyperlink.
 - If users are setting up Google integration: On the **Tools** menu, point to **Integrate with Google**, and then click **Google Integration Preferences**.

Note: If the integration component cannot be downloaded, check to see if the Sage ACT! Premium (access via web) site URL is added to the Trusted Sites zone.

4. If a message appears, read it and click **Install**.
5. When prompted to run or save the file, click **Run**. Follow all remaining prompts to install the integration component. Click **Finish**.

Important: After the first user downloads and installs the integration component, the Administrator must now reset IIS on the web server to complete Google or Outlook integration setup. Any subsequent downloads and installs of the integration component by other web users do not require an IIS reset.

6. If users are setting up Outlook contacts/calendar sync and have installed the integration component using the Outlook Synchronization hyperlink, users must then install the APFWOutlookDetect add-on.
 - a. Click the browser information bar.

If the browser information bar does not display, go to the Tools menu and click Preferences. Click No when prompted to install additional software.
 - b. Click **Run Add-on**.
 - c. When the security warning appears, click **Run**.

Next Steps

- Open Sage ACT! Premium (access via web) and set up email and calendar/contacts synchronization with Outlook or integration with Google. See Help for steps on how to do this.
- An Administrator must recycle the application pool so that integration tools and menus are available in Sage ACT! Premium (access via web). See the next section.

Recycling an Application Pool

An Administrator may have to immediately recycle an application pool instead of waiting for the next configured recycle. Rather than abruptly stopping it, which can cause service interruptions, you can use on-demand recycling. You would do an on-demand recycle after users have installed the Sage ACT! Scratchpad and/or installed integration components.

The following steps explain how to use the IIS Manager to recycle an application pool on demand.

Recycle an application pool using the IIS Manager

1. To open IIS Manager using the Run dialog box, do one of the following for your operating system:
 - On the **Start** menu, click **All Programs**, click **Accessories**, and then click **Run**.
 - On the **Start** menu, click **Run**.In the **Open** dialog box, type **inetmgr**. Click **OK**.
2. Expand the local computer and click **Application Pools**.
3. Select the Sage ACT! Premium (access via web) application pool. By default, it is **DefaultAppPool**. If you have created a custom application pool for Sage ACT! Premium (access via web), select it.
4. On the **Actions** menu, or on the right pane, under **Application Pool Tasks**, click **Recycle**. If a confirmation message appears, click **Yes**.
5. Close IIS Manager.

If desired, you can change the default recycling interval. The next section describes why and how.

Changing the Default Recycling Interval for an Application Pool

Microsoft sets the default recycling interval at 1,740 minutes (29 hours) to restart an application pool. We recommend you change the interval to 1,440 minutes (24 hours). A shorter recycling interval may help with application crashes and recovery of system resources.

Change the default recycling interval for an application pool

1. To open IIS Manager using the Run dialog box, do one of the following for your operating system:
 - On the **Start** menu, click **All Programs**, click **Accessories**, and then click **Run**.
 - On the **Start** menu, click **Run**.In the **Open** dialog box, type **inetmgr**. Click **OK**.
2. Expand the local computer and click **Application Pools**.
3. Do one of the following:
 - Right-click the Sage ACT! Premium (access via web) application pool, and select **Properties**. By default, Sage ACT! Premium (access via web) uses DefaultAppPool. On the **Recycling** tab, for **Recycle worker processes (in minutes)**, change 1740 to **1440**. Click **OK**.
 - On the right pane, under **Edit Application Pool**, click **Recycling**. Under **Fixed Intervals**, for **Regular time intervals**, change 1740 to **1440**. Click **Next**. Click **Finish**.
4. Close IIS Manager.

Troubleshooting Sage ACT! Premium (access via web)

This section helps you identify solutions to:

- Web Site Administration tool errors.
- General configuration issues or errors.

Troubleshooting Web Site Administration Tool Errors

This section describes how to troubleshoot error messages received while configuring your software. When troubleshooting, you may also refer to the Web Site Administration tool log file (AFWAdminLog.log) and the validation log file (validate.txt). These files may provide information about user permissions and errors displayed in the tool, such as ASP.NET and HTTP errors. The Web Site Administration tool must be closed to create an updated log file. Log files are located in: <ACT! installation path>\ACT\ACT for Web\Log.s.

Additional information for troubleshooting the Web Site Administration tool is provided in the Sage ACT! Knowledgebase.

Tip: To bypass errors in the Web Site Administration tool, hold down the SHIFT or CTRL key and click another tab. For example, you may want to view information on another tab before completing the configuration.

Web Server and User Account Tabs

Microsoft SharePoint® software detected. Additional configuration may be required to enable Sage ACT! Premium (access via web) to run.

Cause:

- SharePoint was detected on the web server. Some installations of SharePoint modify the default web site and ASP.NET service configuration.

Solution:

- You may need to perform additional steps for the Sage ACT! Premium (access via web) web site to function. See the Sage ACT! Knowledgebase.

The ASP.NET process account does not exist or is not configured properly.

Causes:

- The ASP.NET service is not available.
- Non-default IIS settings, such as an assigned IP address or host headers, are configured.
- Read permissions are not set.

Solutions:

- Verify that the ASP.NET service is available.
- Verify the configuration of the ASP.NET process account.
- Manually configure users and permissions as described in Knowledgebase Article #14867.

User Account Tab

Unable to retrieve Windows domain information at this time. This information is required to edit the Windows User Account. Please check with your network administrator and try again later.

Cause:

- The Windows domain information is unavailable.

Solution:

- See your network administrator to verify that you have access to the domain.

The ASP.NET process does not have permission to access or run Sage ACT! Premium (access via web).

Cause:

- The ASP.NET process account does not have the permissions on the web server to run Sage ACT! Premium (access via web).

Solution:

- This account requires Read permission for the registry key that contains the encrypted impersonation user credentials. Verify the correct account for your web server configuration.

The impersonation user account does not have access to files and folders required to run Sage ACT! Premium (access via web) on your web server.

Cause:

- The Access to program files and folders or registry permissions required to run Sage ACT! Premium (access via web) has not been granted to the impersonation user account.

Solution:

- Verify that the user is at least a domain user and part of the local Administrators group, and then set the appropriate permissions to the Sage ACT! Premium (access via web) files and folders on the server.

The Windows user account information you have entered is invalid. Please check the user name and password and try again.

Causes:

- The Windows user name or password you entered does not exist in the selected Windows domain.
- The option to force users to change their password at logon has been selected.

Solutions:

- Verify that you entered the correct user name for the selected domain. If you did, you may need to create a user. For more information, see ["Creating a Windows Impersonation User Account" on page 11](#).
- For the impersonation user account, clear the User must change password at next logon check box.

Add/Remove Databases Tab

The impersonation user account does not have access to the database you selected.

Cause:

- The impersonation user specified on the User Account tab does not have permission to access the program files and folders or registry permissions required to run Sage ACT! Premium (access via web).

Solution:

- Verify that the user has the appropriate permission to access all Sage ACT! Premium (access via web) files and database supplemental files on the server.

The web page fails to load after selecting a web site and virtual directory.

Causes

- Various.

Solutions:

- If you are testing a web site that was working previously, execute the tests on the Web Server and User Account tabs to determine the cause of the issue. Your web server configuration may have changed, for example:
 - The password for the impersonation user account was changed or has expired.
 - New software or services, such as SharePoint or Active Directory, were installed on the web server.
 - The application pool where the Sage ACT! Premium (access via web) virtual directory runs was modified.
- If you just created the impersonation user account, you may not have cleared the option to force the user to change the password at the next logon. Clear the User must change password at next logon check box.
- If you just successfully executed the tests on the Web Server and User Accounts tabs, restart IIS on the web server. See Help for how to do this.

Troubleshooting General Errors and Issues

This section describes how to troubleshoot general issues and errors with regard to installation, configuration, security, and so on.

General Errors and Issues

Problem:

- **To continue with the installation, you receive a prompt to let Sage ACT! Premium (access via web) switch your 64-bit IIS and ASP.NET applications to 32-bit compatibility mode. You do not want to automatically switch the mode. The web page fails to load after selecting a web site and virtual directory.**

Reason:

- Automatically switching the mode will cause other web applications on your computer to run in 32-bit mode. If those applications require 64-bit mode, they will cease running; if not, they should continue running, however, they will have less RAM to access.

Solution:

- Set up one web server to run the web application that requires 64-bit IIS and ASP.NET. Set up a second web server to run Sage ACT! Premium (access via web), Internet Synchronization and any other 32-bit IIS and ASP.NET applications.

Problem:

- **Sage ACT! Premium (access via web) Help is not opening when you click Help topics or the Help menu.**

Reason:

- Sage ACT! Premium (access via web) Help is a Web Help help system containing the Mark of the Web (MOTW) setting in each Help topic (.htm). On some server operating systems using Internet Explorer, a blank page appears when Help is accessed.

Solution:

- Add the about:internet site to your Trusted Sites zone or your local intranet zone. The about:internet setting refers to the MOTW security setting in each help topic.

Problem:

- **You receive the message: "Web site is not running".**

Reason:

- IIS may not be running.

Solution:

- Verify that IIS and the default web site are running.

Problem:

- **Errors appear on a remote browser, but not while using the browser on the server.**

Reasons:

- Pop-up blockers are enabled.
 - The web site is not a trusted site on client computers.
 - Your Internet security software does not allow access.
-

Solution:

- Disable pop-up blockers in Internet Explorer or Firefox.
- Add the web site to the list of trusted sites on all client computers.
- Shut down the Internet security software to allow access.

Problem:

- **You receive the message: "400 - Bad Request" or "404 - File not found".**

Reason:

- The Web Site Administration tool tests the site using "localhost."
-

Solution:

- If the Sage ACT! Premium (access via web) site is configured to use an IP address, it will not use "localhost".

Problem:

- **You receive the message: "500 - Internal server error".**

Reason:

- Windows Server 2003 contains a section of IIS that deals with web service extensions.
-

Solution:

- Make sure that ASP.NET version 2.0.50727 is set to Allowed.

Problem:

- **You can access the web site internally, but not externally.**

Reason:

- Your router may not be configured correctly.
-

Solution:

- Ensure your router is forwarded to port 80. For more information, see your router documentation.

Problem:

- **You receive a message saying "... If you continue to see this message, please recycle your IIS application pool, restart IIS, or contact your Administrator".**

Reason:

- You have just installed the Sage ACT! Scratchpad or the integration component to use supported applications with Sage ACT! Premium (access via web) and this message appears.

Solution:

- An Administrator needs to recycle the application pool as it is less disruptive than resetting IIS. See "[Recycling an Application Pool](#)" on [page 21](#).

Problem:

- **You receive the message: "403 - Forbidden".**

Reason:

- You do not have permission to access a file.

Solutions:

- Ensure the impersonation user is a Windows Administrator.
- If you created a custom virtual directory, ensure the Read and Run Scripts (such as ASP) are enabled. See Knowledgebase Article #14868.

Problem:

- **You are accessing Sage ACT! Premium (access via web) using a secured connection (https://) and settings are not being retained. For example, you are scheduling an activity and as you move through the Schedule Activity tabs, settings are changing back to the defaults.**

Reason:

- Your browser may not have the correct setting to allow caching of pages/files when using Secure Sockets Layer (SSL). It is a best practice to have caching of encrypted pages/files turned on when using Sage ACT! Premium (access via web) over SSL.

Solution:

- For Internet Explorer: Click Tools>Internet Options. Click the Advanced tab. Under Security, clear Do not save encrypted pages/files to disk.
- For Firefox: Open Firefox and in the address bar, type about:config. Scroll to the browser.cache.disk_cache_ssl setting. It should be set to True. If it is False, double-click it to change the setting.
- See Knowledgebase Article #28245.

A		F	
ACT! Word Processor		Firefox	
configuring ActiveX security to use	16	browser limitations	16
ActiveX security	15	required browser settings	16
setting for ACT! Word Processor	16	setting to cache pages over SSL	16
Add/Remove Database tab			
assigning databases to virtual directories	13	G	
overview	4		
application pools		Google	
changing the recycling interval	21	installing integration components	20
overview	2	integration requirements	19
recycling on demand	21		
using to isolate Web applications	2	I	
ASP.NET impersonation		impersonation	
creating a Windows user account	11	for single-server configurations	3
ASP.NET impersonation user account		in multiple-server configurations	3
overview	2	impersonation user account	
testing	12	creating	11
ASP.NET user account		overview	2
testing	12	testing	12
		installation	
B		configuration suggestions	1
		planning	1
browsers		installing	
Firefox limitations	16	integration components	20
Firefox required settings	16	mail merge component to use Word	19
Internet Explorer limitations	16	multiple-server configurations	3
Internet Explorer required settings	15	Sage ACT! Scratchpad	18
		single-server configuration	3
C		Internet Explorer	
		browser settings	15
changing session timeout limit	13	limitations	16
copying		SSL setting to cache pages	16
user preferences for ACT! for Web 2005 -2006 users	5		
creating a Windows user account for ASP.NET	11	M	
impersonation		Mark of the Web (MOTW) setting	15
		multiple-server configurations	3
		multiple virtual directories	3
		recommendations	4
D			
databases		O	
assigning to virtual directories	13		
default virtual directory	4	Options tab	
		changing the session timeout limit for a web site	13
E		overview	4
		Outlook	
e-mail		allowing access outside network	18
installing components to use Outlook	20		
examples			
URLs and IP addresses for web site access	14		

installing integration components	20
integration requirements	19
Outlook integration	
editing the web.config file when using a secured service	17

P

planning your installation	1
preferences	
for users	5
locations of	5
sharing across web servers	14

R

recycling application pools	
changing the interval	21
on demand	21
requirements	
Google integration	19
Outlook integration	19
supported browsers	15

S

Sage ACT! Scratchpad	
installing	18
Secure Sockets Layer (SSL)	
editing the Outlook service web.config file	17
Firefox setting to cache pages	16
IE setting to cache pages	16
overview	5
troubleshooting caching pages	28
setting up	
Word integration	19
single-server configuration	
impersonation user account recommendations	3
specifying the Windows user account for ASP.NET impersonation	12
SSL	
editing the Outlook Service web.config file	17
Firefox setting to cache pages	16
IE setting to cache pages	16
overview	5
troubleshooting caching pages	28

T

testing	
Windows user account for ASP.NET impersonation	12
timeout limit	
changing	13
troubleshooting	
general errors and issues	26
SSL and caching pages	28

Web Site Admin tool errors	23
Trusted Sites zone	15

U

User Account tab	
overview	4
specifying and testing Windows user account for ASP.NET impersonation	12
users	
accessing the web site	14
adding to databases and assigning roles	14
allowing access to Outlook (outside network)	18
installing integration components	20
installing Sage ACT! Scratchpad	18
preferences for	5

V

virtual directories	
assigning databases to	13
default for Sage ACT! Premium (access via web)	4
in multiple-server configurations	3

W

Web Server tab	
overview	4
testing your ASP.NET user account	12
web site access	
changing session timeout limit	13
changing the session timeout limit	13
examples of URLs and IPs	14
for users	14
from inside common network	14
from outside common network	14
Web Site Admin tool, overview	4
web.config file	
editing for Outlook access	18
Word	
installing the mail merge component	19
word processor	
installing mail merge component for Word	19