

Sage ACT!

How to Have a Successful Sage ACT! Trial Experience

Sage ACT! Pro 2013 Trial
Sage ACT! Premium 2013 Test Drive



sage



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Thank you for your interest in Sage ACT! 2013. Whether this is your first time looking at Sage ACT! or you are a loyal customer, you'll see how this latest version of Sage ACT! builds on the tradition that has made it the #1 Contact and Customer Management choice of small businesses and sales teams.

TEST DRIVE

The Sage ACT! 2013 Test Drive is an online, interactive trial of Sage ACT! Premium 2013 with no download or installation required. The test drive is the fastest, most convenient way to sample Sage ACT! from your computer. Enter your own contact and company records, create activities, view opportunities, see the dashboard in action, and much more. (Settings and data entered in the Test Drive environment are not saved.)

Please be aware that the following functionality will not work in the hosted Test Drive environment:

- Printing
- Launching web links or Internet applications (including Sage E-marketing for ACT! and Sage Business Info Services for ACT!)
- You will not be able to upload your company files to the hosted environment
- You will not be able to download any information created in the hosted environment
- Integration with Microsoft® Outlook®


For more information on system requirements for the Test Drive, [click here](#).

30-DAY TRIAL

The Sage ACT! 2013 30-day Trial installs the full Sage ACT! Pro 2013 application onto your computer and is **NOT RECOMMENDED FOR CURRENT SAGE ACT! USERS**. It is a fully-functional copy of Sage ACT! Pro 2013 that works for 30 days, at which time it will no longer work unless you purchase a license.

If you are an existing customer, we strongly recommend you utilize the Test Drive application. If you decide to proceed with the 30-day Trial, we recommend you download the application on a computer that is not running your current version of Sage ACT! or housing your Sage ACT! database.

You must ensure the computer meets the minimum system requirements to install Sage ACT! Pro 2013. To see the requirements, [click here](#).



If you download the 30-day Trial onto a computer with a previous version of Sage ACT!, you will need to take these steps before and after you download the trial software, in case you do not purchase the upgrade after the trial period has ended:

Before installing Sage ACT! 2013:

- Using currently installed version of Sage ACT!, backup your Sage ACT! database
- Uninstall Sage ACT!
- Install Sage ACT! 2013 Trial

To return to your previous version of Sage ACT!:

- Uninstall Sage ACT! 2013 Trial
- Install previous version of Sage ACT!
- Restore database using backup created before installing the Trial

Also, changes made and data entered during the 30-day Trial period will be lost if you revert back to your previous version of Sage ACT!.

Technical support is not provided for the 30-day Trial. You will have access to self-service online support at <http://www.act.com/support>. For non-support related questions during your 30-day Trial, please contact a Sage ACT! Sales Specialist at 866-400-4919.

TRIAL DOWNLOAD INSTRUCTIONS

Note: You must be a Windows® Administrator on the computer where you will install Sage ACT!. Otherwise, the installation will fail.

1. Download the files. Save them to a location that you can easily remember, such as your desktop.
2. Double-click and run the downloaded files to uncompress and unpack the installation files. Make a note of the folder where the files are extracted.
3. Navigate to the folder, locate the setup.exe file, and double-click it. The DVD Browser page appears. You can choose to:
 - a. Install Sage ACT! 2013
 - b. View product documentation
4. Click Product Documentation, and then depending on whether you are a new user or upgrading user, select the appropriate guide. These guides contain information for installing Sage ACT! for new users or upgrading to Sage ACT! from prior versions. You may want to print a guide for easy reference. Please review the guides prior to beginning your installation.
5. Click Install Sage ACT! 2013 and follow the instructions.

Tip: You can explore Sage ACT! using the demonstration database. To do this, after you have selected Trial mode, when the Welcome screen appears, select the option “Open an existing ACT! database” and click OK. In the Open dialog box, double-click ACT2011Demo.pad. If prompted, log in as Chris Huffman. No password is needed.

RESOURCES

Knowledgebase Articles:

Visit the Sage ACT! Knowledgebase for additional information to support your Sage ACT! Experience at <http://kb.sagesoftwareonline.com>. Helpful articles include:

- [How to Install Sage ACT! Pro 2013: \(Knowledgebase Article #27964\)](#)
- [How to Uninstall Sage ACT! Pro 2013 and Sage ACT! 2013: \(Knowledgebase Article #27963\) – new article 30217](#)
- [How To Open the Sage ACT! Demo Database: \(Knowledgebase Article #18000\)](#)
- [The Sage ACT! Setup Assistant Explained: \(Knowledgebase Article #27960\)](#)
- [How To Configure Microsoft® Outlook® as your Email Client in Sage ACT! 2013: \(Knowledgebase Article #26832\)](#)
- [How to Add My Sage ACT! Address Book to Microsoft® Outlook® 2010: \(Knowledgebase Article #26796\)](#)
- [How to Synchronize Your Outlook® Contacts With Sage ACT!: \(Knowledgebase Article #26813\)](#)
- [What are Smart Tasks in Sage ACT!?: \(Knowledgebase Article #26777 \)](#)
- [How to Set Up a Sage Connected Services Account: \(Knowledgebase Article #26829\)](#)

Sage ACT! Feature Tours:

Access video tours of various Sage ACT! features here:

<http://na.sage.com/Sage-ACT/support/training-opportunities/Feature-Tours/>

Sage ACT! Online Community:

Access the Sage ACT! Online Community, a place where users of Sage ACT! can share, learn, and support each other on a broad spectrum of issues or interests: <http://community.act.com>

Other Resources:

[Sage ACT! 2013 System Requirements](#)
[What's New in Sage ACT! 2013 Brochure](#)

If you have any non-support related questions, please contact us at 866-400-4919.