

## **Pre-Install Checklist**

Some of the procedures in the checklist may seem unnecessary, but if you want a trouble-free installation, you will want to be sure that you follow most of them. It only takes one failed install to make you realize the truth of Benjamin Franklin's advice of "an ounce of prevention is worth a pound of cure."

### ***Do you have the right ACT! version?***

In a shared environment, ACT! by Sage is designed to work with up to 10 users. If you intend to use some of the more advanced functionality or share a database with more than 10 users, you must purchase an ACT! Premium license per named user (not simultaneous user). Customer registration and activation are required in order to use this software.

### ***Is your other software compatible with ACT!?***

Both ACT! by Sage and ACT! by Sage Premium work with Microsoft Office and Outlook starting with version 2003-2007. It is also compatible with Outlook Express 5.5/6.0, Eudora® 5.2/6.0, Lotus Notes 6.5-7.02, Internet Mail SMTP/POP3, Microsoft Internet Explorer 6.0 or higher. ACT! 2008 and 2009 are the only versions that will work with Vista and with Office 2007. (Actually ACT! by Sage 2007, the basic version, did have some limited compatibility with Vista and Office 2007.) **Note:** Not compatible with Office/Outlook 2000.



*As we go through the manual, this icon gives information on how to accomplish the same thing if you are using the Windows Vista™ operating system.*

### ***Does the workstation/server meet Minimum System Requirements?***

You will need to verify that each of your workstations (including your server) meets the minimum system requirements AND that appropriate service packs have been applied. Note that ACT! will NOT install on a server with any Windows Server 2000 operating system.

#### **ACT! or ACT! Premium Minimum System Requirements**

- Microsoft® Windows® XP Home, XP Professional, Windows XP Media Center, any Server 2003 (including Small Business Server) operating systems (all of these version need Service Pack 2). **Note:** Not Windows 2000 Server or NT Server.

It can also be installed on Microsoft Windows Vista™ Home Basic, Vista Home Premium, Vista Business, Vista Ultimate, Vista Enterprise.

- Minimum 600 MHz Pentium III processor (PIV recommended)
- Minimum 512 MB RAM (1GB RAM or higher recommended)
- Minimum 2GB of available hard disk space for installation
- CD-ROM drive
- SVGA (800x600) or higher resolution monitor

**Procedure:** *To verify your minimum system requirements*

1. Right-click My Computer and select **Properties**.
2. Verify that your Operating System, processor speed, and RAM meet or exceed system requirements.

**Verify that there is 2Gig of free space on C:\**

You MUST have 2GB of temp space available on the C:\ drive, even if you don't plan to install on the C:\. If 2GB is not available and another drive is available, change the temp variables location.

**Procedure:** *To change temp variables location if necessary*

1. Right-click **My Computer** and select **Properties**, click the **Advanced** tab. If Vista, click **Advanced System Settings**.
2. Click **Environment Variables...** button.
3. Edit the Temp variables (Temp and TMP) if necessary to define the location to a different drive. You could change it to something like D:\Temp.
4. **OK** and **OK**. You will need to reboot the PC for this setting to take effect.

**Ensure that File and Printer Sharing is an installed service**

This check is probably only necessary for new machines.

**Procedure:** *To determine File and Printer Sharing is Installed...*

1. Right-click **My Network Places** and select **Properties**.
2. Right-click **Local Area Connection** and select **Properties**. If Vista, click **Manage network connections** first.
3. Verify that **File and Printer Sharing for Microsoft Networks** is listed. If not, click **Install...**, select **Service** and click **Add...**, select the Network Service and click **OK**.
4. **OK**.

**Procedure:** *To determine Simple File Sharing is Enabled...*

1. Right-click **My Computer** and select **Explore**.