

eXact Contacts For ACT! Setup Guide 2.0

Prerequisites

- Windows 7 or newer
- Sage ACT! 2010 (Pro or Premium) or newer
- Microsoft .NET 4.0 Full Install (download here <http://www.microsoft.com/download/en/details.aspx?id=17851>)
- Other Downloads

eXact Contacts for ACT! For iOS

<http://www.iTunes.com/app/exactcontactsforACT>

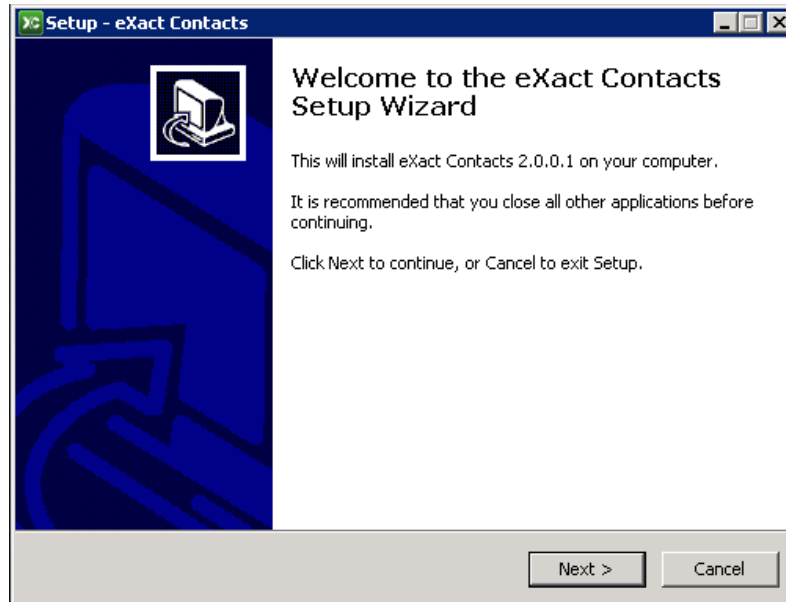
eXact Contacts Sync Service <http://www.exactcontacts.com/>

eXact Contacts For ACT is two pieces of software that work together that make up the eXact Contacts for ACT! solution. To help clarify which piece of the solution the documentation is referring to, the software that runs on the mobile devices will be eXact Contacts For ACT! and the software that runs on the PC/Server will be the eXact Contacts Sync Service. We hope this clarifies any confusion.

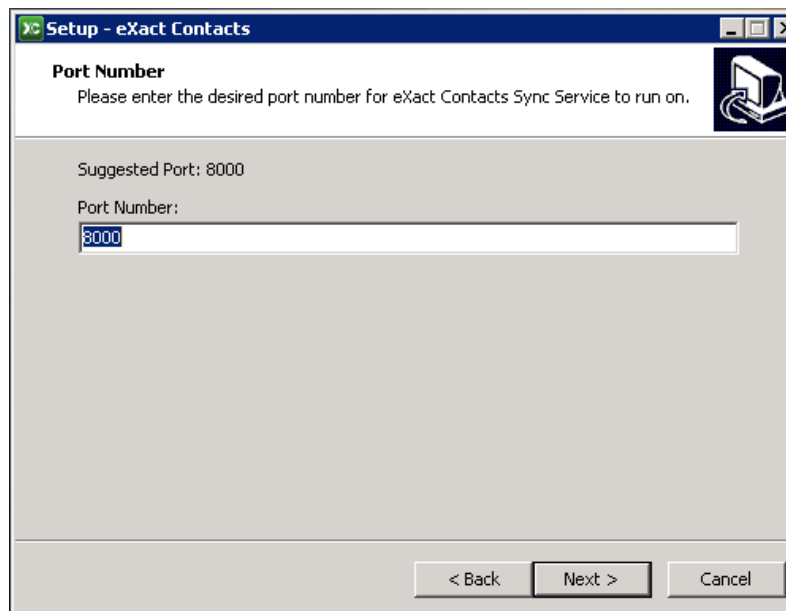
Installing the eXact Contacts Sync Service

The eXact Contacts Sync Service requires ACT! to be installed on the PC/Server that is running the eXact Contacts Sync Service. Make sure you have ACT! 2010 or newer and Microsoft .NET 4.0 (Full Install), NOT Client Profile, installed before installing the eXact Contacts Sync Service.

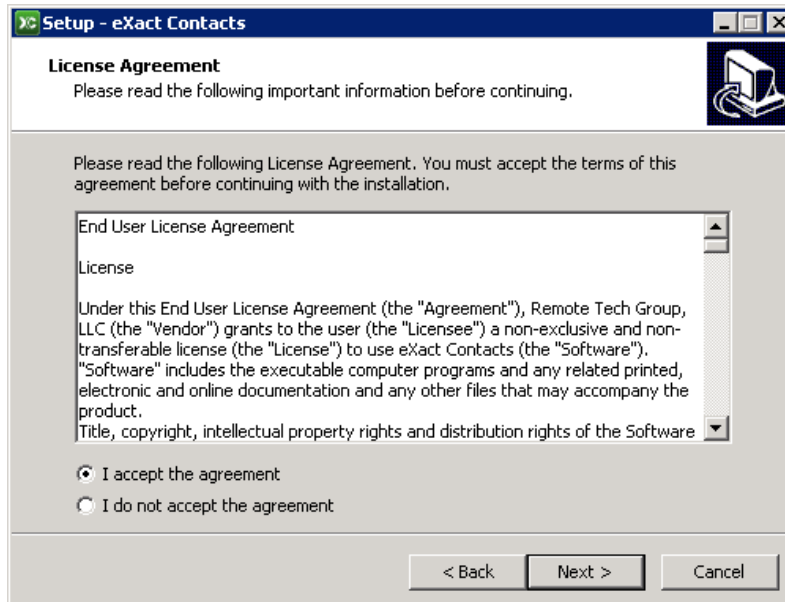
1. Double click the eXact ContactsSetup<versionNumber>.exe you downloaded from the eXact ContactsForACT.com website.
2. The installation wizard will begin with the screen below.



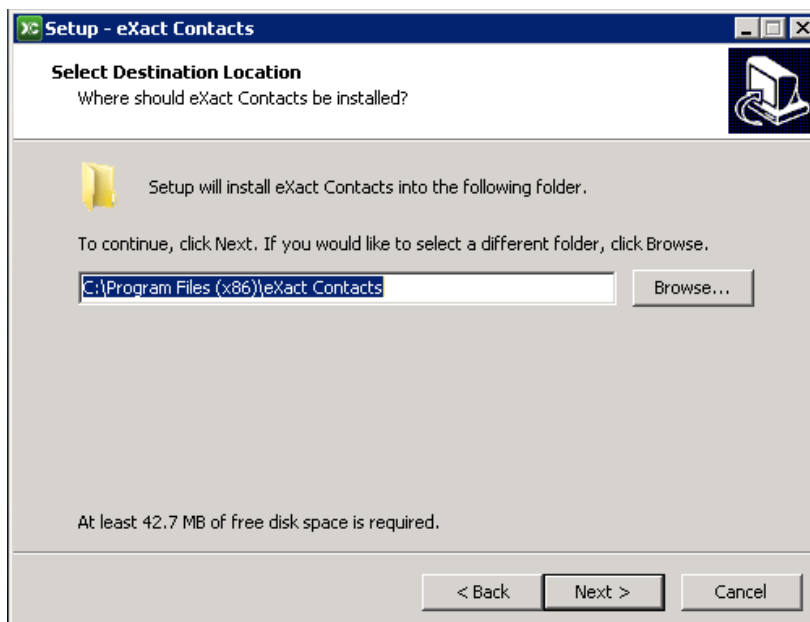
3. At this time you may change the port if you desire. If you are unsure what this is, leave it at 8000.



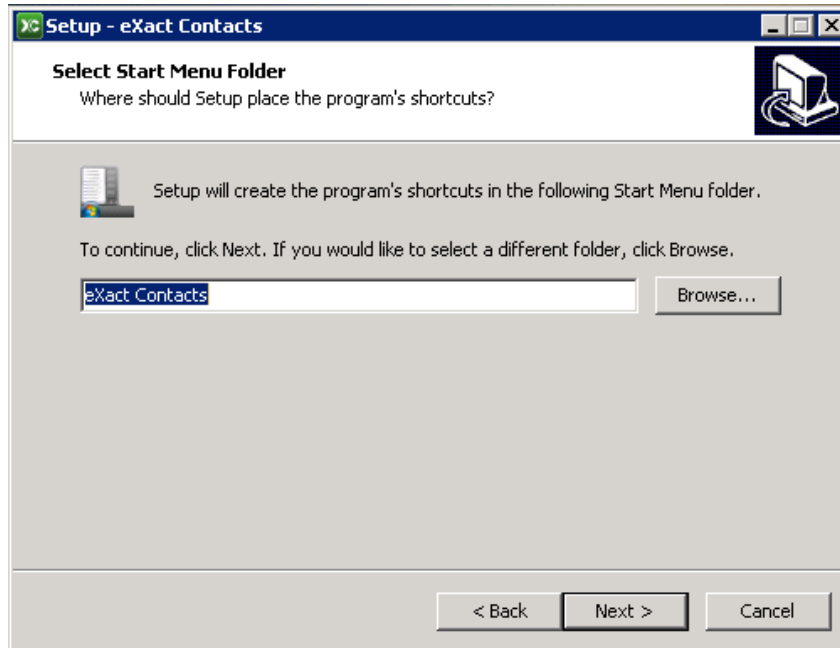
4. Read and Accept the End User License Agreement for eXact Contacts for ACT!



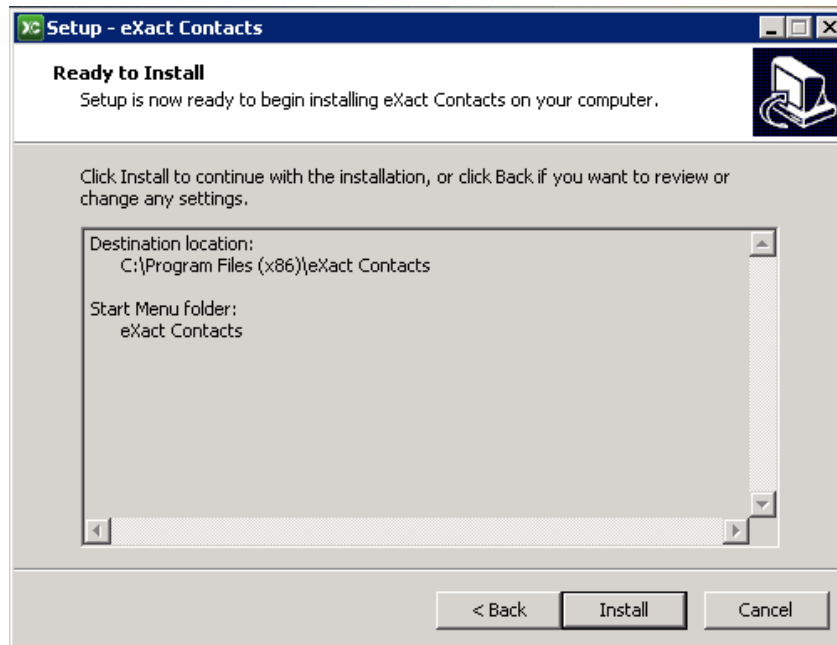
5. At this time you may change the path for the eXact Contacts Sync Service, if you desire (not recommended).



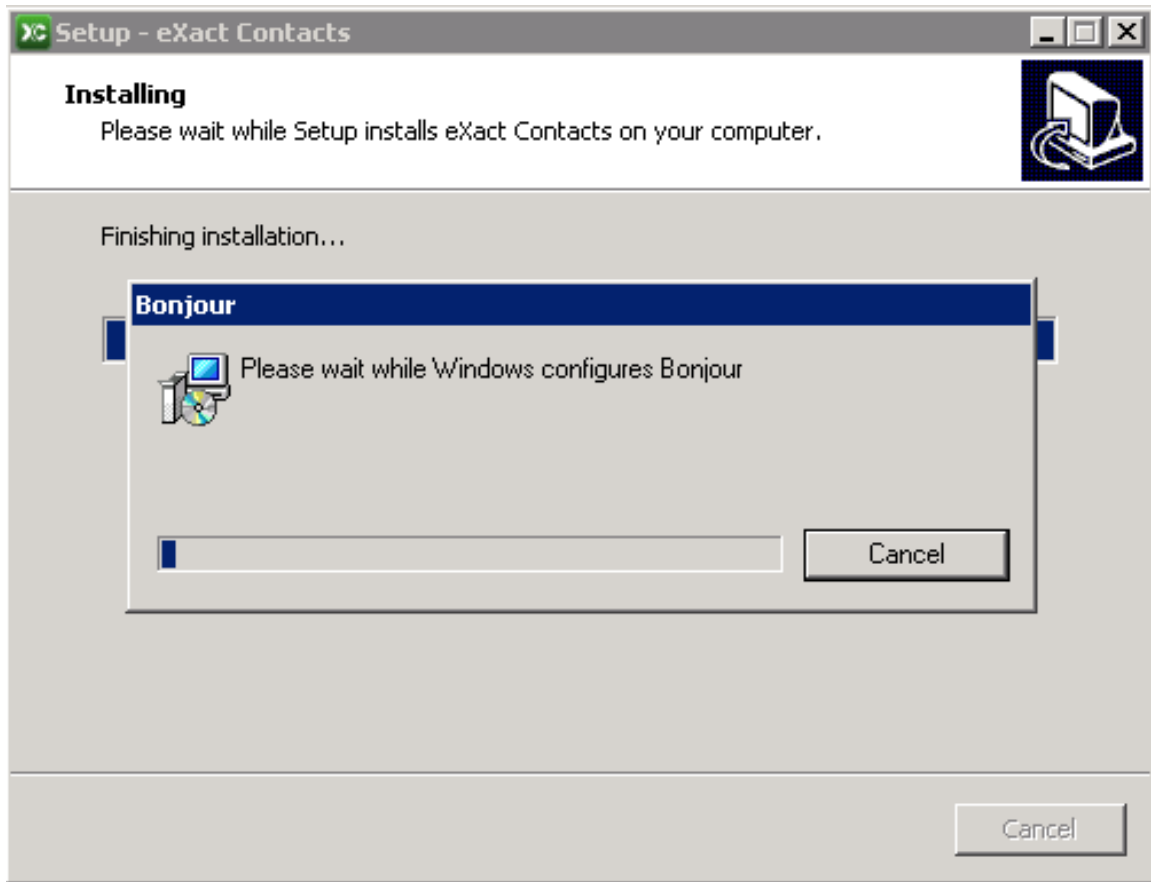
6. At this time you may change the Program Folder location for the eXact Contacts Sync Service, if you desire (not recommended).



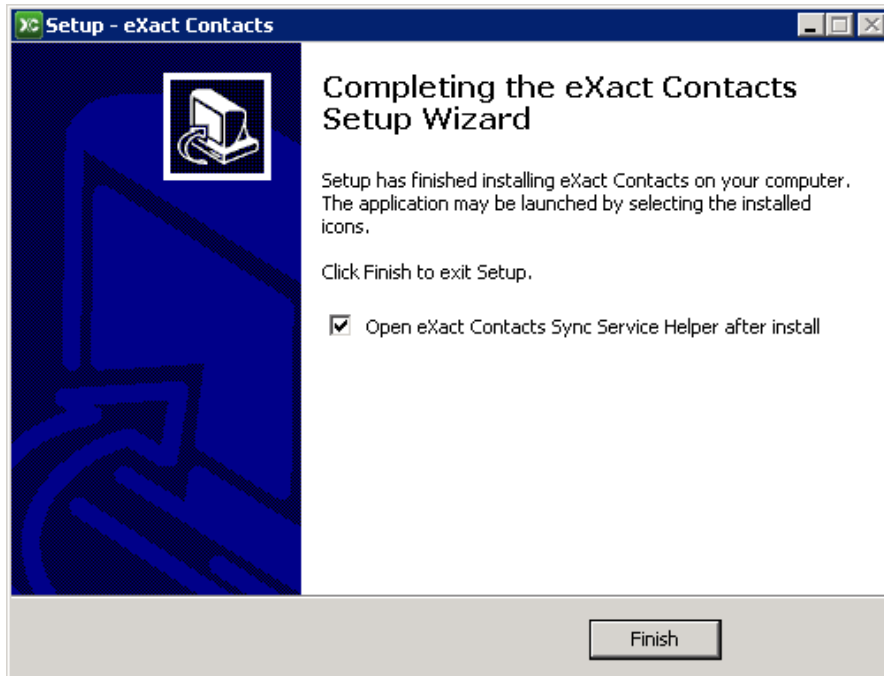
7. Review the install configuration and click the Install button.



8. Once eXact Contacts For ACT! is installed you will see the following confirmation screen.

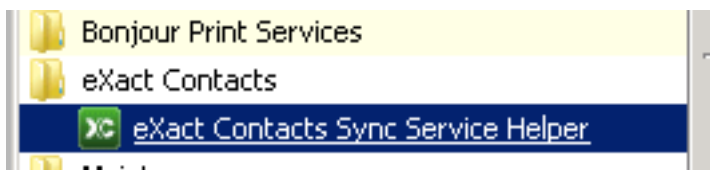


The eXact Contacts Sync Service is now installed. Proceed to configuring the eXact Contacts Sync Service.

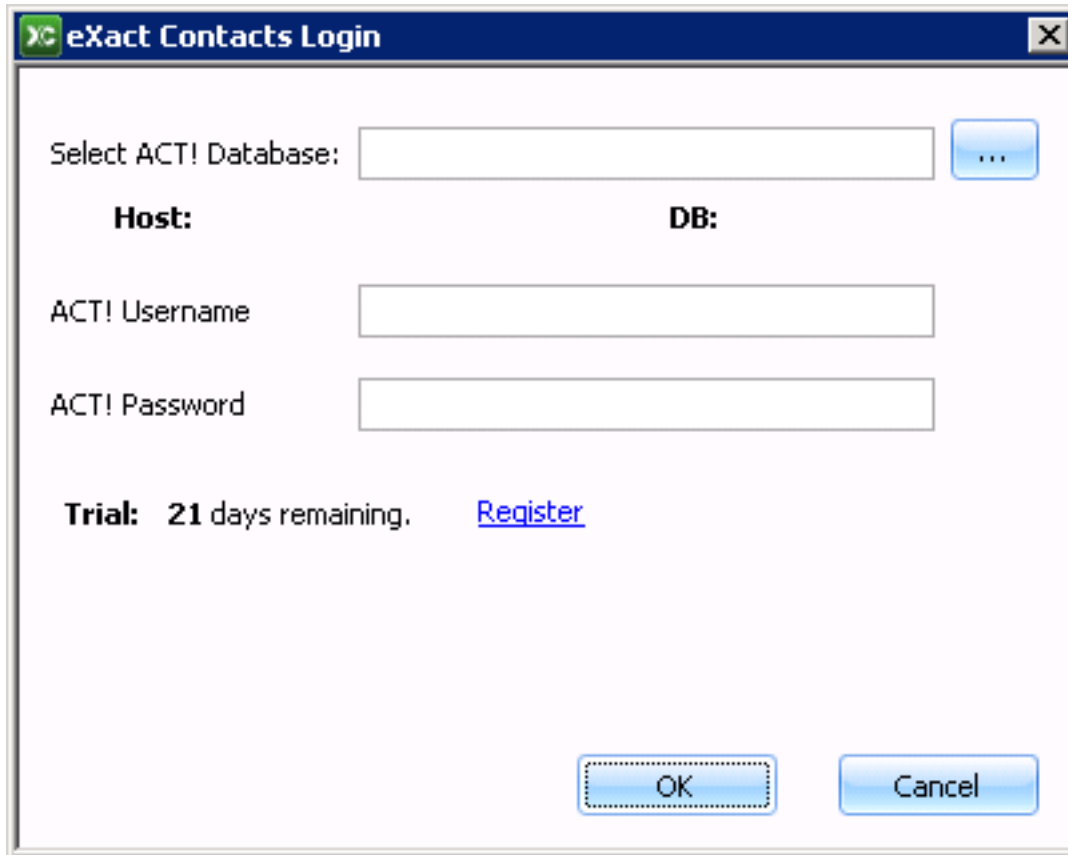


Configuring the eXact Contacts Sync Service

1. Start by loading the eXact Contacts Sync Service Helper UI on the Start Menu.



2. You will then be prompted to log into a ACT! database. Login to the eXact Contacts Sync Service by selecting the ACT! Database Pad file of the desired ACT! Database, and then providing a ACT! Administrator Username and Password for the ACT!

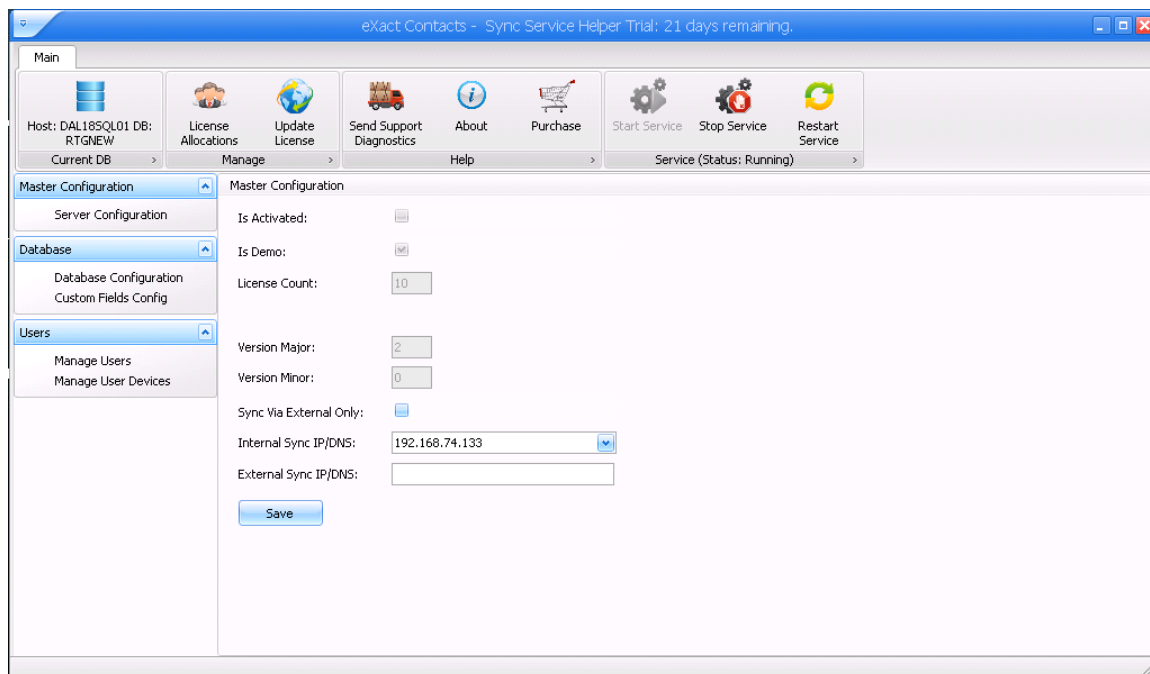


The screenshot shows a dialog box titled "eXact Contacts Login". It contains the following elements:

- A label "Select ACT! Database:" followed by a text input field and a blue button with three dots.
- Labels "Host:" and "DB:" positioned above the input fields.
- A label "ACT! Username" followed by a text input field.
- A label "ACT! Password" followed by a text input field.
- A trial notice: "Trial: 21 days remaining." followed by a blue underlined link "Register".
- At the bottom, there are two buttons: "OK" (with a dotted border) and "Cancel".

Database.

Note: If you are using multiple ACT! databases, once you have configured the first ACT! database to work with eXact Contacts Sync Service, exit the eXact Contacts Sync Service UI, and then re-run the eXact Contacts Sync Service UI again from the program menu. Then Open the second ACT! database. eXact Contacts supports multiple ACT! databases, but additional eXact Contacts for ACT! licenses maybe required.



Setting Server Network Settings:

Once the eXact Contacts Sync Service UI has loaded, you will see the following image.

For server configurations it is a good idea to supply your external WAN IP or DNS. External users are required to know at least one IP Address or DNS of the server they want to sync to when they setup eXact Contacts for ACT! on their device. By supplying this information, this will allow devices to download the additional information needed when they sync. These settings are used for all ACT! Databases that the eXact Contacts Sync Service is configured for.

Note: If you are installing the eXact Contacts Sync Service on a PC/Server that uses DHCP to get an IP Address, Remote Tech Group does not recommend you provide your DHCP IP address here. Please leave these fields blank if you are using DHCP. Remote Tech Group recommends you change your PC to a static IP Address or configure your firewall or router to provide your PC with the same IP Address every time based on its network card MAC address.

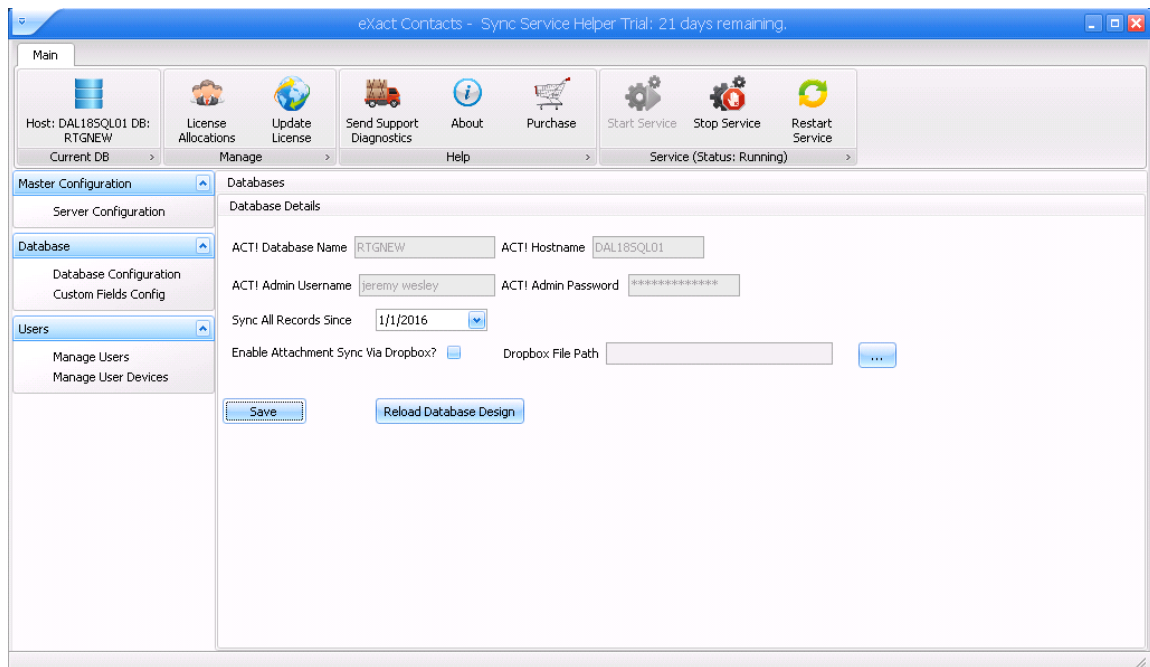
What is your IP Address?

Your IP Address is the address of your machine on your network, much like the street address of your home. To find out what your PC's IP Address is, look in the eXact Contacts Sync Service on the Service Configuration panel, and you will see your Internal Sync IP/DNS. eXact Contacts only supports IPv4.

As of eExact Contacts Sync Service 1.0.60 and eExact Contacts For ACT! 1.03 eExact Contacts now supports Bonjour to help with zero configuration setups in small networks.

Database Specific Configuration

If you click on Edit Current Database Config on the left side you will see the following screen. Set the Minimum SubEntity Date to the oldest date of the histories, activities & notes you wish to send to your devices. The recommendation is January 1st 2015 or later.



Force Refresh Schema : This will rebuild the schema that is sent to the devices that are syncing. This includes: ACT! Users, Activity Types, History Types, Priorities, Field Picklist & Field definitions. The eExact Contacts Sync Service UI must be able to lock the ACT! database to build the schema. If you have other users logged into the ACT! database, you will need to ask them to logout while you request the Force Refresh Schema.

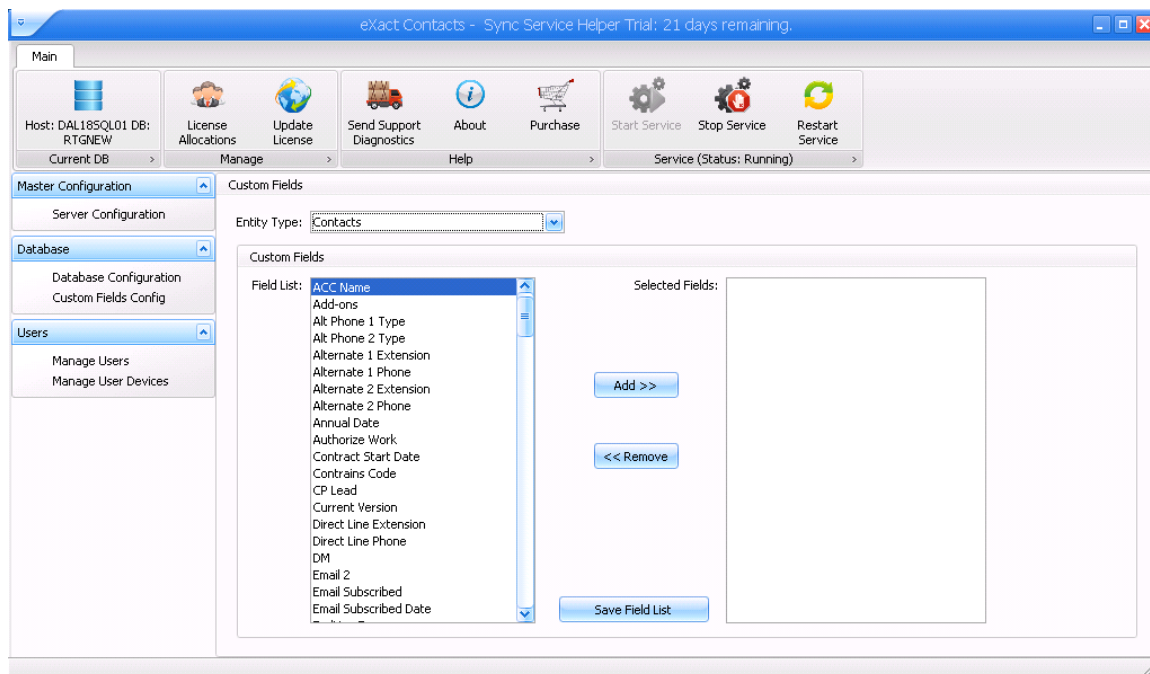
However, while this will update the field schema for custom fields, there are certain exceptions that will disable an eExact Contacts For ACT! database from syncing .

Remote Tech Group **does not** recommend that you change custom field types.

Example: Changing a number field to a character field in the ACT! Define Fields area. This will cause the eExact Contacts for ACT! database on your device to stop syncing, if the changed field is a selected custom field.

Syncing Custom ACT! Fields

eExact Contacts for ACT! supports 50 custom fields for all main entities. Although eExact Contacts does not support Companies and Opportunities at this time, Remote Tech Group is working to deliver this in an upcoming update.



To select your 50 custom fields:

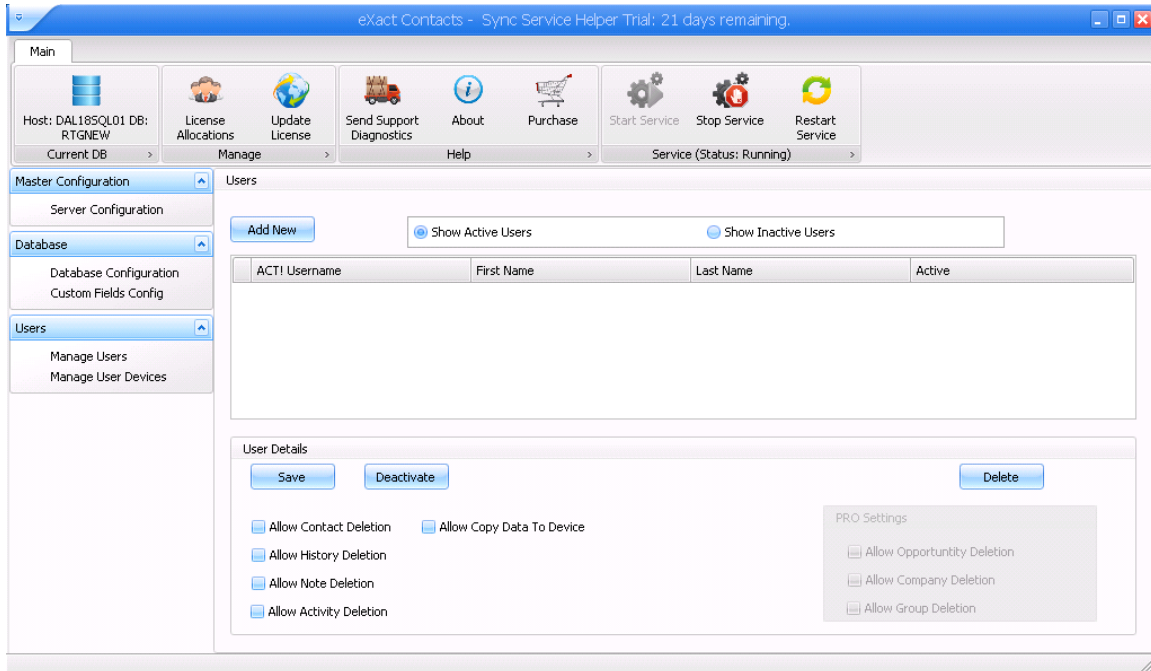
1. Select Edit Custom Field Syncing on the left, and you will see the screen pictured above.
2. Select Contacts from the Entity Type drop down, located across the top.
3. A list of available custom fields will be displayed on the left side, select the custom field you would like to sync and then click the add button. The field is now on the right side and will sync to eXact Contacts for ACT!.
4. When you are done selecting your ACT! Fields, click the Save Field List button on the bottom.

NOTE: Custom fields syncing should follow these rules at all times to avoid data issues, including loss of data.

1. Select your custom fields **before** you setup and sync any devices. This will ensure that all of the custom fields data is sent to the devices.
2. You can add more custom fields after a device is paired with eXact Contacts but you cannot remove selected custom fields while paired devices exist. You will have to delete the devices and then start with a fresh eXact Contacts for ACT! database by creating a new pair code and downloading all data again, for each device.
3. If you add a new field **after** devices are paired with the eXact Contacts Sync Service, **it is recommended that you only add newly created ACT! fields that have no data in them.** If you do select a existing ACT! field that has existing data in it that you would like to sync to the devices, you will need to edit the records that have data so the records will be flag to be synced to the devices.
4. Data types for a selected custom field **cannot** change. Example: you cannot change a number field to a character field. The result will be orphaned eXact Contacts Databases as eXact Contacts does not support changing data types

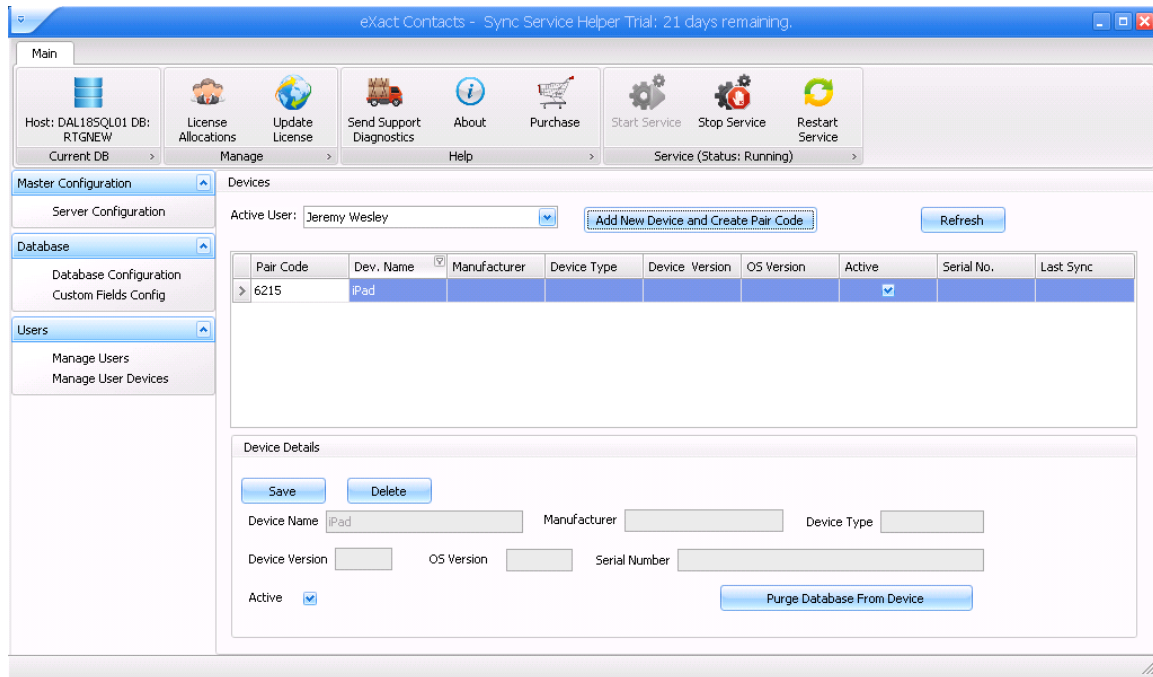
of custom fields. If this happens in your ACT! database, you will need to delete the eXact Contacts for ACT! Database off the devices and then setup new databases on each device using a new pair code.

Not following these rules will lead to data loss in custom fields that may not be immediately apparent.



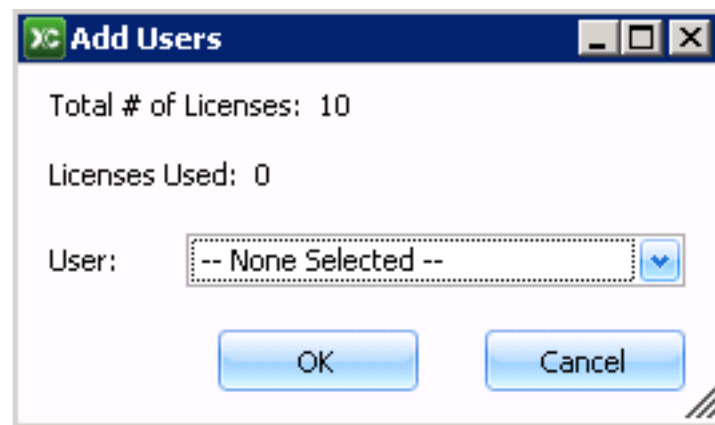
Setting up access for ACT! users.

By default, no ACT! user has access to sync with the eExact Contacts Sync Service. The eExact Contacts Sync Service licensing allows you to purchase eExact Contacts Sync Service licenses for only the number of users you require to sync, which in most cases is fewer than the number of ACT! license you have. You must select which users have access to the eExact Contacts Sync Service.



1. Start by selecting Add/Edit Users on the left. You will see a grid with no users listed.

2. To add a new user, click the Add New across the bottom. You will then be prompted to select an ACT! username. Select the desired ACT! username and click OK.



This user will now be listed in the active users grid.

Below the grid in the User Details are you can customize the security actions that the user can perform in eXact Contacts for ACT! on their device. **Make sure to click the save button when done making changes.**

NOTE: Allow Copy Data To Device, is only available after the eXact Contacts Sync Service is licensed. Checking this option will allow the user to copy all the ACT! contacts in eXact Contacts For ACT! to their devices Address Book app for caller ID, and GPS purposes. In larger environments where data security is an issue, its not recommended that you check this option as it may allow users to potentially export and abuse the contact list.

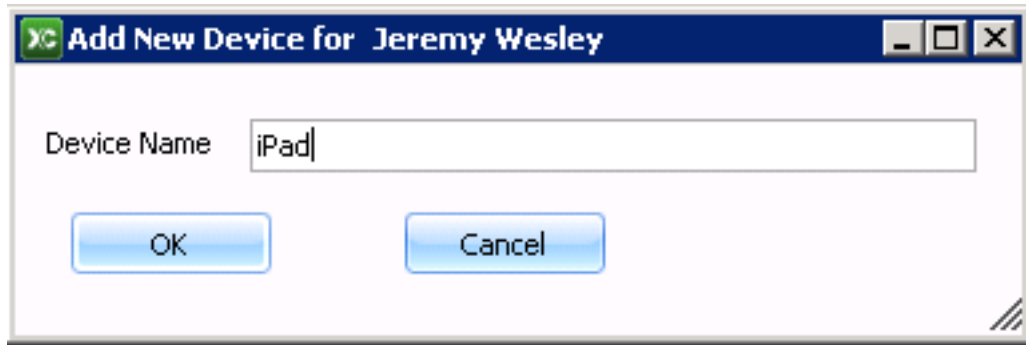
Limiting the number of contacts that Sync

When you add a user in the eXact Contacts Sync Service UI it creates a group in the ACT! database named “eXact Contacts_<username>” in this example eXact Contacts_ChrisHuffman. This group determines what contacts are sent to the devices of this ACT! user. By default, the group contains all the contacts that the user has access to. If you edit the group, you should retain the criteria that include users.

Preparing to pair a device with the eXact Contacts Sync Service.

The last step in the eXact Contacts Sync Service UI is to create a pair code. With a pair code you are securely linking the iPad with your ACT! database much like you may have paired your bluetooth headset with your mobile device.

1. Assuming you have added an ACT! user as outlined in the previous section, click on the Add/Edit User Devices on the left. You should see the following screen.
2. Select a user from the Active Users list across the top. If the user has existing devices you will see them listed. To add a new device, click the Add New button at the bottom. You will be prompted for a name of the device. The information you type here is just for your reference. Anything is acceptable. Click OK.



3. Then you will receive a pair code. You don't need to write the pair code down as it is displayed in the device grid. Pair Codes can only be used once. Once you see your devices information in the device grid, the pair code can no longer be used to setup a new device. Each user is allowed two devices, you can create a second pair code for the second device at any time. You can also delete pair codes that are linked to devices that are no longer syncing.



Active Check Box: If a device is no longer active, it cannot sync, and the user of the device will no longer be able to use the database. Devices can be made active again.

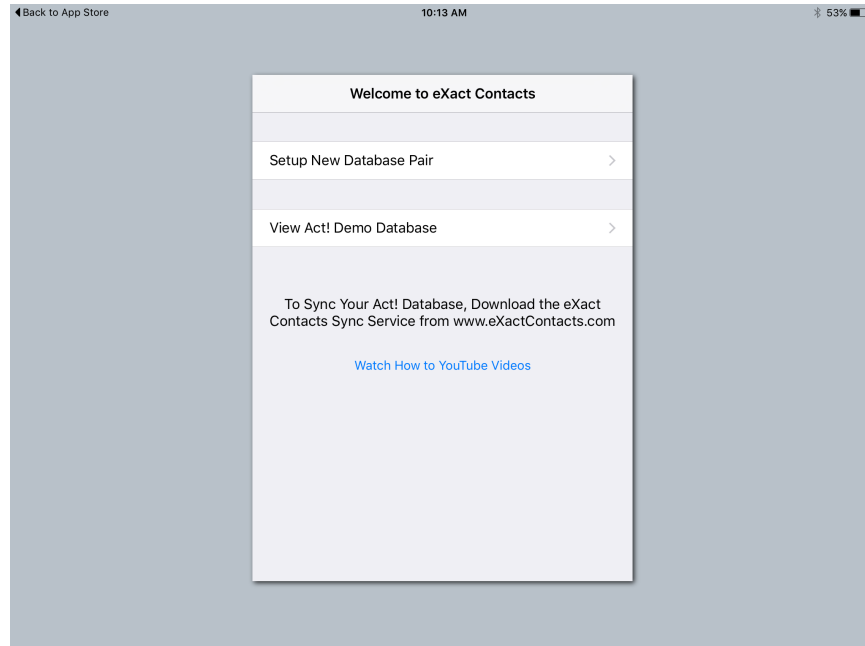
Delete Button: This will permanently remove the paired device from the config. The database on the device will no longer be accessible. If you delete it accidentally, you will have to create a new pair code and download all data to the device again.

Purge Database From Device: This allows you to remotely delete a database from the device. This feature is useful if the corporation does not own the end users' device, but wants to put the corporation's data on the device, while still protecting the corporation's data.

Pairing the device

Now its time to pair your ACT! Database with eXact Contacts for ACT! on your device.

1. On the device touch Setup New Database Pair



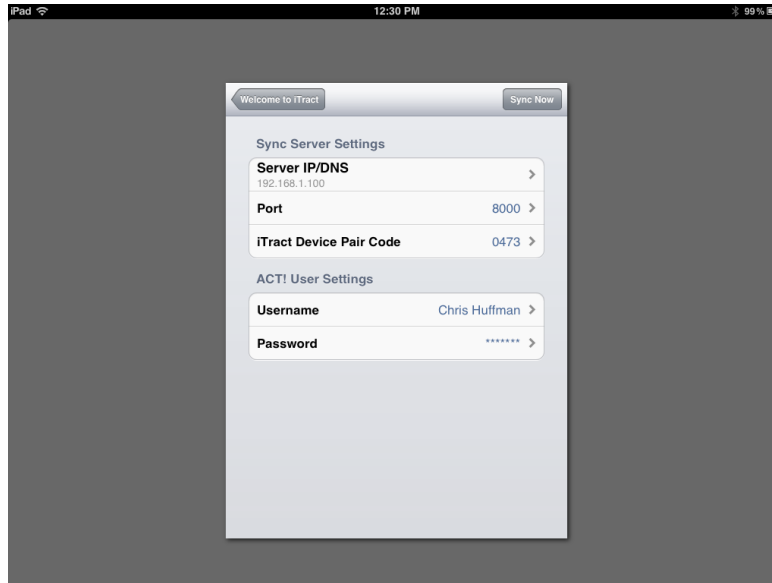
You will need the following information

Server IP: This is the IP Address of the PC/Server where you installed the eXact Contacts Sync Service or select a discovered eXact Contacts Sync Service

PORT: 8000 is the default; if you changed it during installation of eXact Contacts Sync Service, provide the new port.

Pair Code: The pair code you received in the last section.

ACT! Username and Password: These are the ACT! credentials of the user.



2. Once you have provided the correct information touch the Sync Now button in the top right corner. The first sync will begin downloading the selected data.

Troubleshooting

Common error messages and how to resolve them

Here is a list of possible error messages and how to resolve them.

Error Message:

Sorry, we determined that the network is not available. Please try again later. **OR** eXact Contacts is unable to connect to the network.

Resolution:

Your device is not connect to any network. Please make sure your device is connected to your WiFi and try surfing the web to confirm real connectivity.

Error Message:

Sorry, cannot connect to the Sync Server provided, Check your settings **OR** eXact Contacts is unable to connect to the eXact Contacts Sync Service, please check the service on the ACT! server.

Resolution:

1. Make Sure the eXact Contacts Sync Service is running & licensed if trial has expired.
2. Ensure that software firewalls are not blocking the eXact Contacts Sync Service Port (default 8000). The eXact Contacts Sync Service installation added firewall rules for windows firewall but not third party firewalls.
3. From the PC/Server try to open the following URL in your browser
`http://<serverIP>:<eXact ContactsPort>/itractSyncService`
Example : <http://192.168.1.100:8000/iTractSyncService>

- If this URL is responsive then the service and firewall is open and working.
4. From the mobile device, try opening the URL in the Safari web browser in step 3
If this URL is responsive then the service and firewall is open and working.

Error Message:

Time Difference is too great, The server or device has an incorrect time

Resolution:

eXact Contacts requires the time on the mobile devices and PC/Server be correct with in a few mins. Ensure that the time and time zone settings are correct on your PC/Server. Most mobile devices have automatic time updates with support for timezone updates.

Error Message:

Sorry, could not pair device, check pair code and ACT! credentials.

Resolution:

1. Check to make sure your username and password are correct. You can confirm your ACT! username in side of ACT! by going to the Tools menu> Manage Users. Edit your user account and you will see a username field. Make sure this is what you have typed into eXact Contacts for ACT! on the device.
2. Remember Pair codes can only be used once. Once used it will display the devices information including manufacture and device OS version.
3. Create a new pair code and retry.

Error Message:

Sorry, we are unable to download the Database Schema, please Force a Schema Update.

Resolution:

When the eXact Contacts Sync Service UI first connects to the ACT! Database it tries to lock the database to build the schema that it sends to the devices. This error message means that the eXact Contacts Sync Service UI could not lock the ACT! database. This could be due to other ACT! users currently logged into the database. Politely ask the other ACT! users to logout, once they are all logged out of the ACT! database you can then click the Force Refresh Schema button. Then try pairing again. You will probably need a new pair code.

Error Message:

eXact Contacts has downloaded new custom fields, you must log out of this database and log back into load the new ACT! fields. Sync will not resume until you do this.

Resolution:

Simply go to options, touch the bottom option "Log Out <database name>" then log back into the database. The new custom field will be created and you can now continue syncing.

Other Resources

For more information please visit our knowledge-base at
<http://support.eXactContacts.com>

For errors or issues not mentioned here please contact our support team at
646-419-4808

Support@exactcontacts.com

This document was written for eXact Contacts Sync Service 2.0.0.1 and eXact
Contacts For ACT! 2.0.0