

**What Changes Were Made in ACT! by Sage 2010 SP1**

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Question

You would like to know what changes have been made in ACT! by Sage 2010 SP1.

Answer

The ACT! 2010 SP1 release is focused on improving the quality of the ACT! 2010 release and a number of usability enhancements related to navigating the application and using key features. This list is provided to improve your installation and overall use experience of ACT! 2010 SP1.

#### New Features & Product Improvements

#### Fixed Issues

#### New Features & Product Improvements

The following items listed below identify new features and improvements with the ACT! 2010 SP1 release:

**Opportunities** For new databases, the Weighted Total column has been removed from the default Opportunity List view. After extensive user testing, this field was confusing to new users. This field can be added to the list view at any time using the customize column function. The total dollar value of the opportunities in the list view is now shows at the top of the list view for easier identification.

**Navigation/Searching** On the global toolbar (a.k.a. "the big easy buttons"), the search button will not access the Keyword Search dialog. On the Keyword search dialog, the gridlines have been removed from the search results and instructions have been added to the dialog on how to open the records in the results area. The order of the items in the View menu has been changed to match the order of items in the navigation bar. The "view Groups/Companies" functionality that was previously present as a button on the Contact Detail screen has been added back in as a related task in the left navigation for the contact detail view.

**Groups and Companies** A count for the total number of contacts in each group and company have been added to the detail views for both group and company records.

**Mail Merge** Wording has been added at the end of the mail merge dialog to alert users that when they click "finish" on the last pane of the wizard, the mail merge will automatically begin.

**Task List** The "location" field is now a field available to add to the task list view and will be in the default task list view for all new databases.

**Histories** Users can create a history from a document created in ACT! without printing it.

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**Fixed Issues**

**Performance** The following performance enhancements have been included in ACT! 2010 SP1: Time to Launch ACT! improved by 2 seconds. Time to open the Opportunity View improved by 6 seconds. Time to perform a lookup by last name improved by 2 seconds. Time to run a contact report improved by 40 seconds. Time to perform a mail merge to email improved by 10 seconds. Time to open ACT! with the Dashboard as the default initial view improved by 27 seconds.

**Activities/Notes/Histories** When creating follow-up activities after clearing activities on Opportunities, Groups and Companies are not automatically associated with the activity. This issue has been resolved. When clearing personal

activities, the icon shown in the history item does not match the icon in the activities item. This issue has been resolved. The default start time when you schedule an activity from Daily/Work Week view does not default to system time. This issue has been resolved. Timeless activity dates changes to previous day if users are in different time zones. This issue has been resolved. Example for when an issue occurs: A user in the EDT time zone schedules a timeless activity for 5/30. A user in the PDT time zone (-3 hours from EDT) will see this activity scheduled for 5/29 due to the time difference of -3 hours between EDT and PDT which shifts the activity from 5/30 12:00 AM to 5/29 9:00 PM. Logged in user's activity records are displayed when filtered specifically by that user, but not when filter is set to "All Users". This issue has been resolved. When recording a history of a call on the current day with the record indicating the call was completed on the previous day, the "Last reach" field shows today's date as the last reached because the record was updated today. This issue has been resolved. Clearing a reoccurring activity after editing the item from the Task List reschedules another activity on the original date. This issue has been resolved. When scheduling activities in the Opportunity, Group or Company detail view, the activities do not automatically show in the Activity tab until the user saves the record. This issue has been resolved. Opportunities When doing lookups for Opportunity statuses, the values that appear in the drop down menu should be the actual statuses (Open, Closed-Won, Closed-Lost, etc) but instead they are numeric values (1, 2, 3). This issue has not been entirely resolved, but some wording was added to the dialog to instruct users who are doing a lookup which values to use to get the required data. Users will be unable to change the security level for a private Opportunity directly to Limited Access. They must first change it to public and then switch it to Limited Access. This issue has been resolved. If a user modifies the precision values of the Opportunity product fields (example: 1.24 to 1.24135) in the define fields dialog and then navigates back to the Opportunity detail view, those changes will not be reflected until the user closes ACT! and reopens it. This issue has been resolved. When creating a contact lookup on a selected group of Opportunity records in the Opportunity list view, the results returned are incorrect. The results show all contacts appearing on any Opportunity in the database instead of only those contacts associated with the selected Opportunities. This issue has been resolved. In the Opportunity detail view, if a user clicks on the Groups/Companies tab, and changes the drop down to show for "companies" and then clicks on the "Add/Remove Companies" button, the dialog that will open will default to adding groups instead of companies. This issue has been resolved. In the Opportunity layout, a user can add the following fields to the layout multiple time: Status,

Probability, Process/Stage, and Associate With. However, although the fields appear to be added to the layout, they will not actually appear in the layout more than once. This issue has been resolved. In the Opportunity layout, a user can add fields to the product/services tab in the layout designer, but those fields are not actually added to the layout. This issue has been resolved. If a user removes the cost field from the products tab in the Opportunity detail view, it is no longer possible to add products to the Opportunity. This issue has been resolved. When invoking the "Share with" dialog from the history record on the Opportunity view, the dialog to select the share with records takes over a minute to launch. This issue has been resolved. Clearing an activity that is associated with an Opportunity does not associate that Opportunity to the history record that is created. This issue has been resolved. iCalendar & Microsoft® Outlook® Integration After configuring an ACT!/Outlook rule, Outlook is unresponsive for up to two minutes. This issue has been resolved. Contacts In the Contact Detail view, the date and time under the Notes/History tab is left justified and centered vertically instead of being vertically placed at the top of the row. This issue has been resolved. In the Contact detail view, the Date, Time, and Results fields are not aligned within History item. This issue has been resolved. In the Contact List view, users are unable to use Edit>Copy or Ctrl+C to copy a contact record. This issue has been resolved. If a user selects all records in the Contact List view using Ctrl+A, the selection takes more than a minute to complete. This issue has been resolved. Dashboards On the "Top 10 Opportunities" dashboard chart, if a user clicks on one of the Opportunities, makes a change to the opportunity that would be reflected in the data displayed in the chart and then navigates back to the dashboard, the chart will not reflect the updated changes to the data. This issue has been resolved. On the "Opportunity Pipeline by Stage" dashboard component, if the user sets the filters to display all stages and then clicks on a section of the pie chart, it does not filter for the correct opportunities. This issue has been resolved. Conversion/Import/Export After a failed database backup, there are large .BAK files in the \Backup folder of the datastore. This issue has been resolved. During conversion, Contact and Group dropdown lists are created in the target database if they do not already exist. However, if the user has created a custom field in 6.0 and assigned dropdown list values, and the name of the field is already assigned to a System Picklist in the target database, conversion will fail. This issue has been resolved. If a user attempts to import text delimited data into currency fields, the values are not correctly imported. This issue has been resolved. Misc On the top row of navigation buttons in ACT!, the "View Email" button opens a new email when using Outlook as the email editor. This issue has been resolved. When

using the "Edit/Replace" functionality in ACT!, if a user chooses the record manager field, it is not available. This issue has been resolved. If a user unchecks the box in the define fields dialog to allow users to edit items from the list, the "edit list" value still appears in the drop down list. This issue has been resolved. When adding a date field to the database and layout, if the value of the date field is populated, saved and then erased and saved, the value will reappear. This issue has been resolved. If a user right clicks on the 'create date' field, the "Lookup Create Date" option does not appear in the right click menu. This issue has been resolved. [Return to Top](#)

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