IIS Configuration for Sage ACT! Premium – A Review in Pictures

In order to leverage the web capabilities built into Sage ACT! Premium, it can be very helpful to understand IIS (Internet Information Service) and its differences version to version. This article will in an easy-to-follow pictorial, detail the basics of setting up an IIS server as well as some common customizations that are done in the field.

Only one person (usually the IT person or Administrator) really needs to perform this setup in order for everyone else to be able to leverage web/mobile client connectivity. So let's begin with the bare minimum that is necessary to properly configure web/mobile connectivity.

The first thing that you will need to decide is what machine will be set up as the "server" machine for hosting Sage ACT! Premium. This is most commonly the same machine designated to be the database server. Make sure that this machine will be running continuously; otherwise, access obviously will be unavailable. Once you have decided, you will need to install the Sage ACT! Premium (Web) installer. This will place a specialized version of the Windows client on the server that can be used to administer the web server. Once you have this installed, please complete the following steps in order to configure web/mobile access:

**Basic Setup**

1. Run Sage ACT!
2. Run Tools Menu > Web Site Administration
3. On the Web Server tab, select the "Test" button.

**Note:** This will verify that your ASP.NET process account exists and the service is started.
4. Go to the User Account tab and click on the Edit button. Select the proper domain and user name account; this is usually the administrator’s account.

**Note:** Used to specify and test the Windows user account for ASP.NET impersonation.
5. Select the Add/Remove Database tab. Make sure that you add all the databases you want users to be able to access with the web client and/or mobile client.

**Note:** Used to assign or remove a Sage ACT! Premium database to and/or from your virtual directory/website.
6. Select the Options tab and change timeout to whatever value you wish. This is how long before inactive users will get automatically logged off.

**Note:** By default, the timeout limit is set to 20 minutes.
That's it—now you are set up to access your server by web/mobile. Once complete, you can validate this by launching your supported web browser on the server by typing this URL: http://localhost/APFW

In order for other clients to access this site, you need to give them a URL that they can access because “localhost” will only work if you are running the web browser on the server. Other users need the proper server/host name. This can be an IP address or the server name, for example:

If the IP address is 10.40.211.58, the client address is: http://10.40.211.58/APFW
If the Server’s name is www.testserv.com, the client address is: http://www.testserv.com/APFW

These are the URLs that any client can access real-time for data just like the Windows client, using a supported web browser on desktop or laptop PCs or using Sage ACT! Premium Mobile Client on supported mobile devices. Therefore, you will want to notify all the users you wish to access this data with this URL.

**Note:** There is also a video <http://www.youtube.com/watch?v=tqF8dP1cfIQ> of the upgrade process for Sage ACT! Premium 2012 Service Pack 2 (for Mobile) that you may find useful.

**Advanced Setup**

There are many configuration options available to the administrator of the server machine that go beyond the setup capabilities within the Sage ACT! interface. These will almost exclusively require making changes in Internet Information Server (IIS) on the server machine. First, let’s get some basics out of the way.

IIS is leveraged by Sage ACT! in order to create website(s), specifically for the desktop web clients and mobile web clients. There are currently two versions of IIS supported by Sage ACT!: IIS 6.0 (Server 2003) and IIS 7.0 (all other platforms). It’s important to understand that the user interfaces between these two
versions are very different. I recommend using IIS 7.0 if you are setting up a new server, as it is significantly improved in my opinion—particularly in the areas of virtual folder and application pool configuration usability. In order to run IIS on your server, do the following:

Select <Start Button>-> Control Panel-> System and Security-> Internet Information Services (IIS) Manager

There are numerous configuration capabilities that could be covered in this article, but this article contains some of the most common and how to accomplish them properly using IIS (7.0).

Request #1: How do I change the name of the website from “APFW” to something else?

Answer: This is the most common request. Basically it entails creating a new “Application” with the name that you wish to use instead. In this example, we will rename “APFW” to “Sales”.

1. Run IIS.

2. Expand “Connections” (left side) and right click on “Default Web Site” (that is where APFW “Application” is located by default).
3. Type “Sales” into the “Alias” field. This will make the url http://<servername>/Sales.

4. Click “Select…” and choose “SageACT” for the application pool.
5. Click “Select” next to “Application pool” and select “SageACT” in the drop-down.

6. Enter the “Physical path” which should be either
C:\Program Files (x86)\ACT\Act for Web\APFW or
C:\Program Files\ACT\Act for Web\APFW (depending on your server OS).

7. Click “Connect as…” and select “Specific User”
8. Click “Set” and enter the same user credentials that you used when setting up basic settings in the Sage ACT! Web Site Administration Dialog (usually it’s the name of the Administrator on the server).

9. Click “Test Settings…” and verify everything passes. If you followed the steps correctly, it should.
10. You should now see “Sales” in IIS listed as shown. Now you have a new website called “Sales” so you can go to this URL:  http://<servername>/Sales

11. Run the Sage ACT! Windows client and go back to the “Web Site Administration” dialog on the “Add/Remove Database” tab. Select “Sales” Virtual directory.
12. Add whatever database you desire. In this case, it should match the databases listed under the APFW Virtual Directory. Then you are done!

**Request #2: How do I have separate sites for segmenting different databases?**

**Answer:** It’s often desirable to limit some users to accessing a different set of databases over the web so that access can be isolated or segmented as needed. Here are the steps to have two databases (db1 and db2), where one of them is accessed through the site: http://<servername>/APFW and the other accessed only by: http://<servername>/Sales

1. Follow the steps found above for “How do I change the name of the website from “APFW” to something else?” Then you will have both Application/Virtual Directories setup with databases.

2. On server machine, launch ACT! Windows Client and get to the “Web Site Administration” interface. Select the Add/Remove Database Tab.

3. Select “APFW” virtual folder and add db1 to it in the bottom section.
4. Select “Sales” virtual folder and add db2 similarly.
You have completed your setup. Now you can send out the appropriate URLs to users you want to have access to each site.

**Request #3: I have many users accessing site(s) on my IIS Server. How can I improve performance?**

**Answer**: One thing to understand is that each site you set up in the same “application pool” can only run in two gigabytes (GB) of memory because it is a 32-bit server process even if you have a 64-bit machine with eight GB of memory. Therefore, it's often wise to break up each application/virtual directory to run under separate “application pools.” Using the example above—where we have two sites (each with one database)—I will describe the steps to make the sites each run under separate application pools. Specifically we will update the “Sales” application/virtual directory to run off a newly created application pool called “SalesPool.”

1. First we need to create a new application pool, so run IIS and right click on “Application Pools” then select the “Add Application Pool…” option.

   ![Internet Information Services (IIS) Manager](image)

   2. Next type in “SalesPool” as the “Name.”
3. Change the ".NET Framework version" to "NET Framework v4.0.30319."

4. Select “OK” and you should now see your new application pool.

**Application Pools**

This page lets you view and manage the list of application pools on the server. Application pools are associated with different applications.
5. In order to assign the “Sales” application to run under the “SalesPool” application pool, select the “Sales” application and then choose Manage Application and Advanced Settings.

6. Click in the box next to “Application Pool” which currently says “SageACT” and it will show a “…” button next to it.
7. Click that “…” button and change the application pool to “SalesPool.”

8. You are now finished. This application is running under a separate application pool named “SalesPool.”
<table>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Pool</td>
<td>SalesPool</td>
</tr>
<tr>
<td>Physical Path</td>
<td>C:\Program Files (x86)\ACT\Act for Windows \Administrator</td>
</tr>
<tr>
<td>Physical Path Credentials</td>
<td>ClearText</td>
</tr>
<tr>
<td>Physical Path Credentials Logon Type</td>
<td></td>
</tr>
<tr>
<td>Virtual Path</td>
<td>/Sales</td>
</tr>
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**Virtual Path**

[path] URL path for the application.

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