



TACT WINDOWS INSTALLATION GUIDE

Use this document to get setup with Tact on Windows. The guide covers both the Tact Application as well as the Tact Outlook Plugin which will streamline your workflow between your meetings and CRM.

Contents

System Requirements	1
Tact Windows App	2
Tact Outlook Plugin	4
Tact Windows FAQ	6

System Requirements

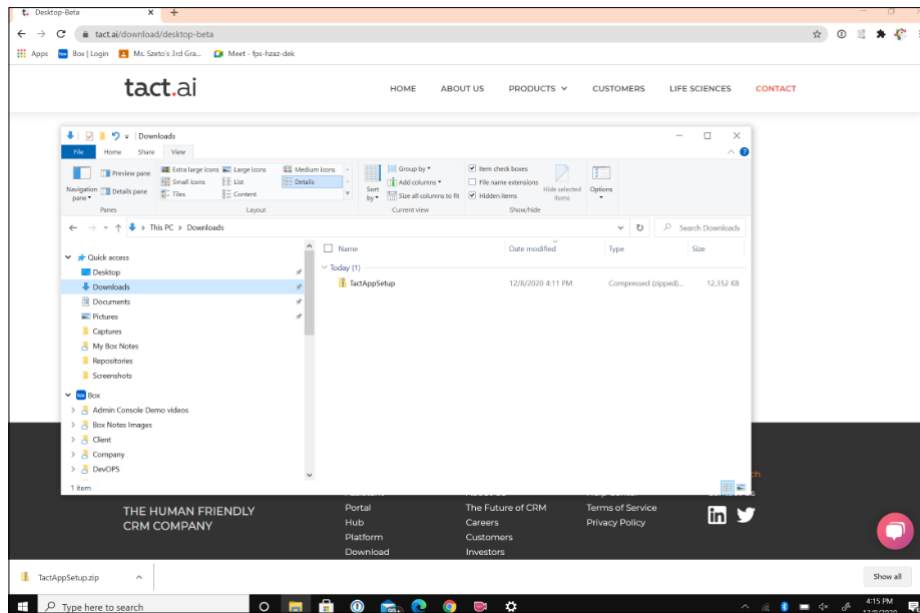
Operating System.....	Windows 10 (64-bit)
Minimum .NET runtime version.....	4.7.2
Office / Outlook version.....	Outlook 2013 or later (64-bit)
Browser.....	Internet Explorer 11 or higher

Operating System.....	iOS
Tact Version.....	4.1.2 (4107) required
Tact Calendar Permissions.....	Enabled ^[1]

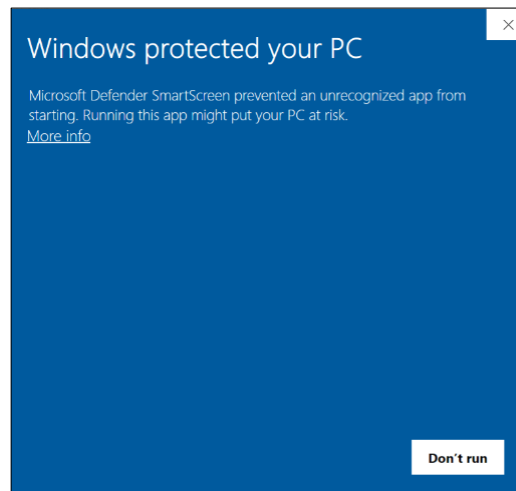
^[1] *Your iOS Device must be syncing to your Apple Calendar*

Tact Windows App

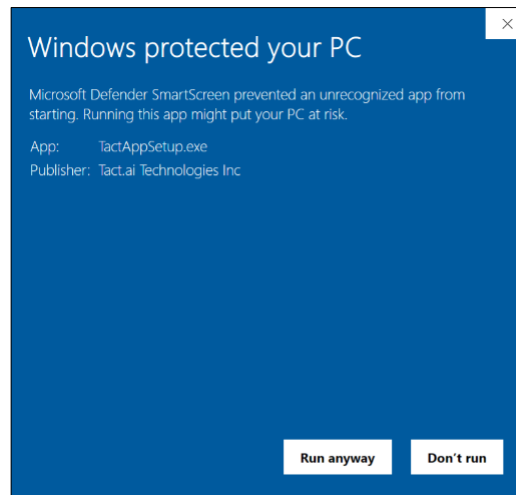
1. Download the latest version of the Tact Windows app from <https://www.tact.ai/download>. This should download TactAppSetup.zip to your downloads folder.



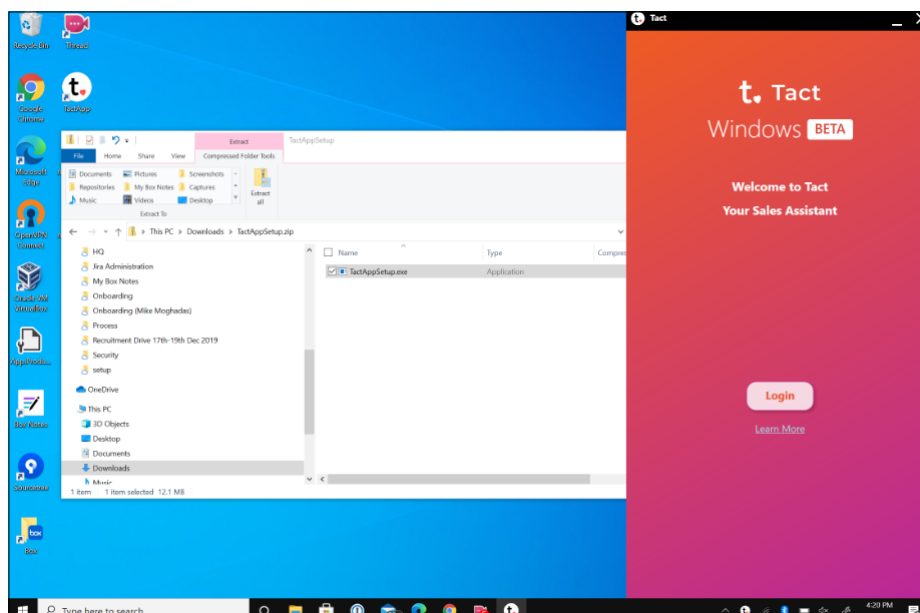
2. Extract the contents of the zip file. It consists of a single file, TactAppSetup.exe
3. Double-click the TactAppSetup.exe file. This should open a UAC screen similar to below:



4. Click “More Info.” This should reveal “Tact.ai Technologies Inc” as valid publishers of the app.

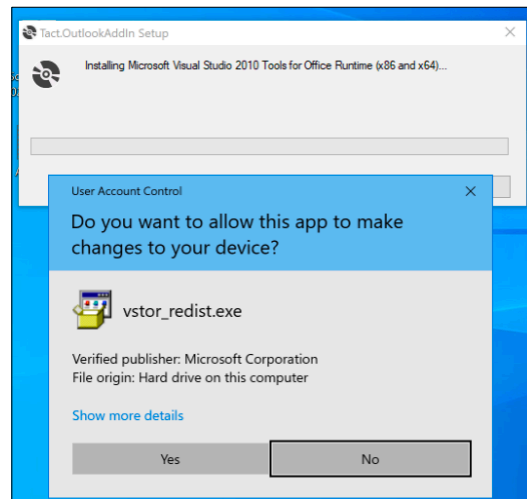
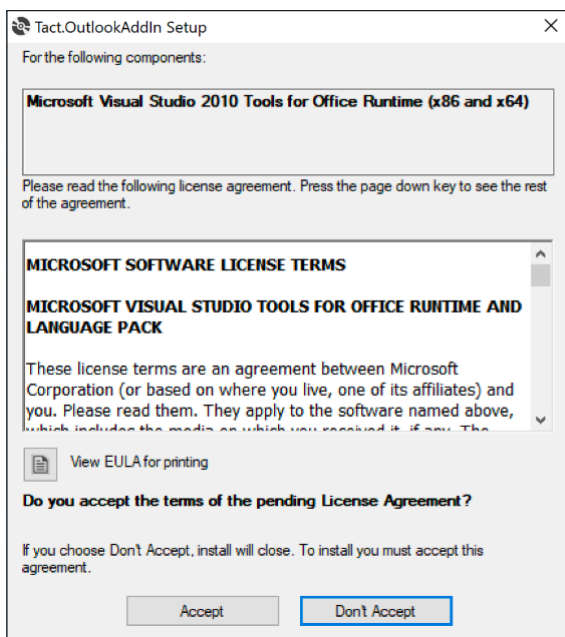


5. Click “Run anyway.” This will automatically start the install process and the app should start up.

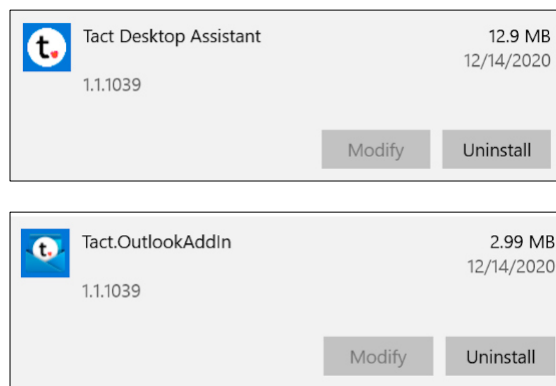


Tact Outlook Plugin

1. Download the latest version of the Tact Outlook plugin from <https://www.tact.ai/download>. This should download TactOutlookAddInSetup.zip to your downloads folder.
2. Extract the contents of the zip file. It consists of a single file TactOutlookAddInSetup.exe
3. Confirm that Outlook app is shut down when installing the add-in.
4. Double-click the TactOutlookAddInSetup.exe file.
5. The first time you install, if you do not have Visual studio Tools for office Runtime, you might see a prompt to accept the License Agreement. Click “Accept” and go ahead with the installation of these pre-requisite files.



6. Open Outlook app and the add-in should get loaded.
7. If you find that the add-in did not load, check Outlook File Manage COM add-ins. If the Tact Outlook plugin has been disabled, click on 'Always enable this add-in'
8. As a last step, you need to confirm that the Tact Outlook add-in and the Tact Desktop app are the same version. See sample screenshot
If they are not the same version, you will need to contact your support to provide you installers for the same version.



Tact Windows FAQ

1. How long does Tact require to sync the first time the app gets installed?

Typically, the duration of the process would be between 2-5 minutes depending on the volume of records required to download. This is determined by the relevancy rules configured for your configuration.

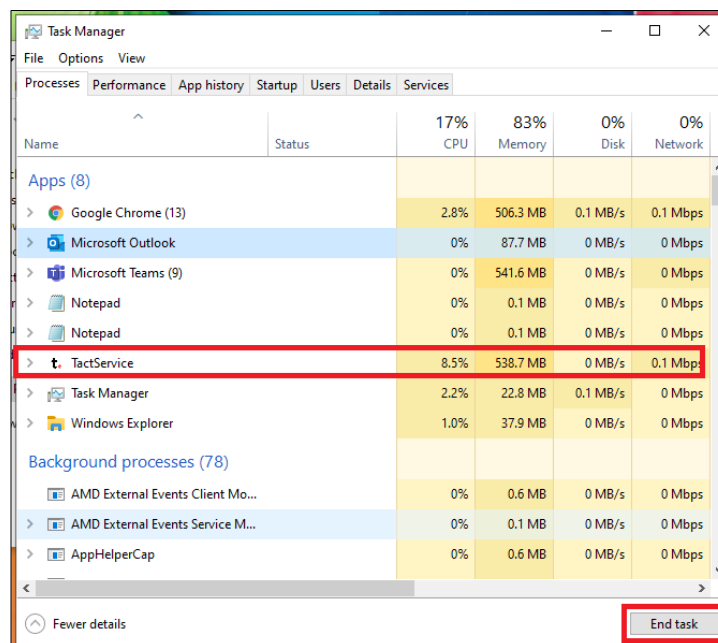
Please do not exit the app or the sync will get paused.

2. What should I do if the initial sync takes more than 15 minutes to complete, or if it appears that my Tact app is in a continual sync state?

In rare instances, the sync process duration may appear to take an excessive amount of time. In this instance, please close the Tact app (right-click app icon on taskbar and “exit”) and then then reopen it to reset the sync process. If you continue to experience issues in a long sync duration, please follow the steps below to end the Tact app on the background, capture the logs and send it to our Support team so that we may investigate and assist in resolution of the issue

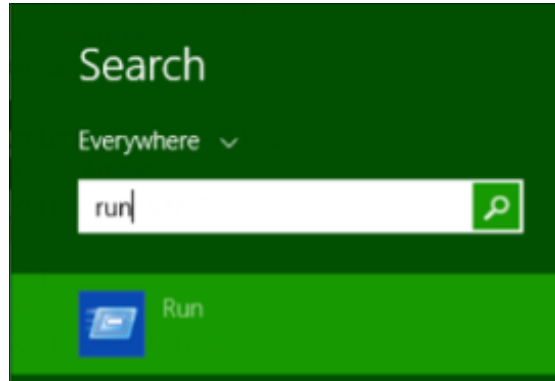
Steps:

End the task on your task manager by performing a right click on your task bar, select “Task Manager”, select “Tact Service” and click “End Task”

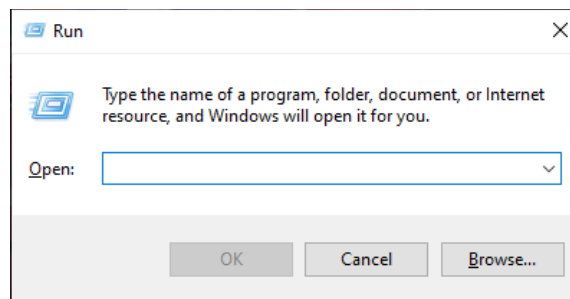


In order to help us with the troubleshooting, please send us the log files to support@tact.ai by performing the following steps:

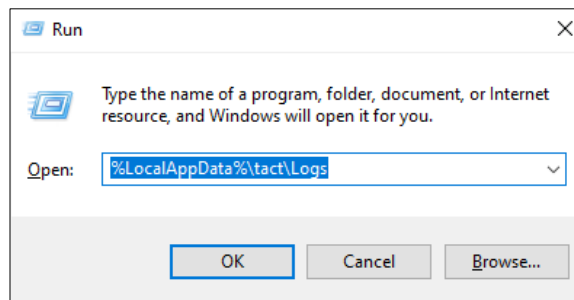
- a. On Windows, type "Run" on the search bar:



- b. Click Enter and this popup window will appear on your screen:



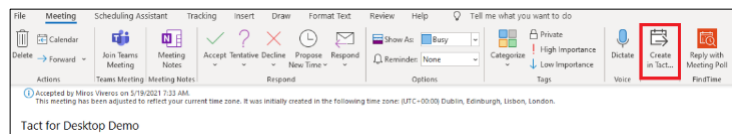
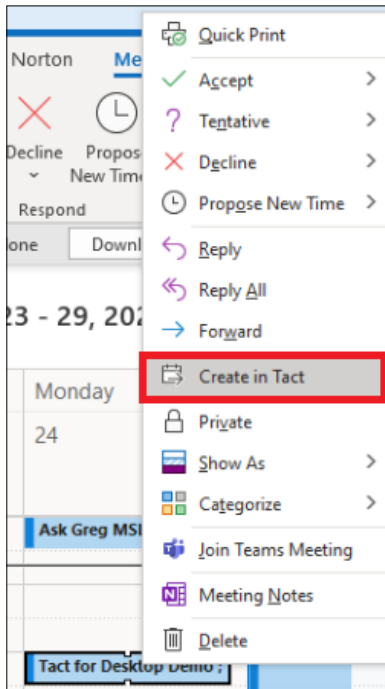
- c. Copy/paste or type %LocalAppData%\tact\Logs and click "Enter":



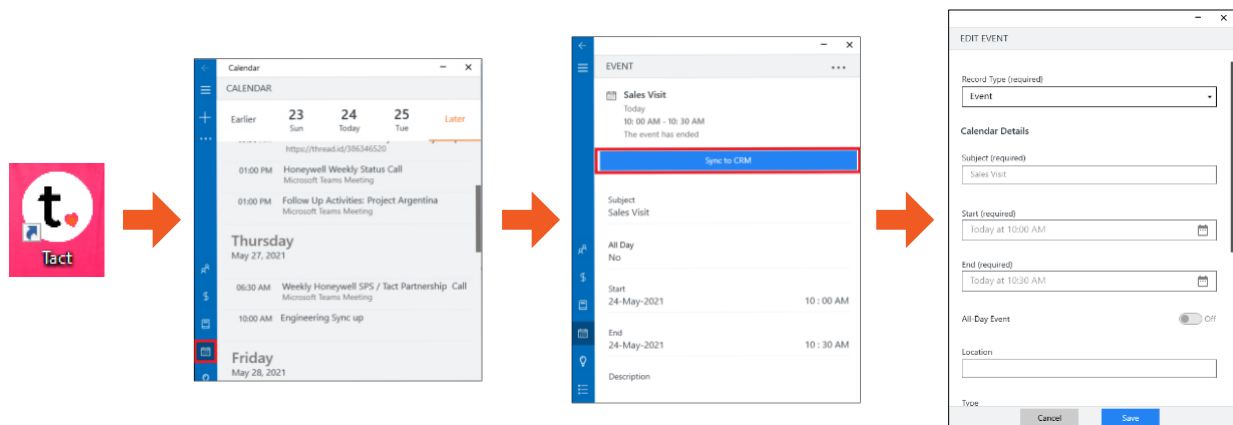
- d. A folder will appear with multiple file names similar to "Service_2021-04-09"
- e. Please send all the log files to support@tact.ai indicating that you were unable to complete the initial sync process

3. How can we create visit plans?

You may create visit plans by either performing a right click on the calendar invite or by opening the calendar invite and clicking on the “Create in Tact” button on the menu bar:




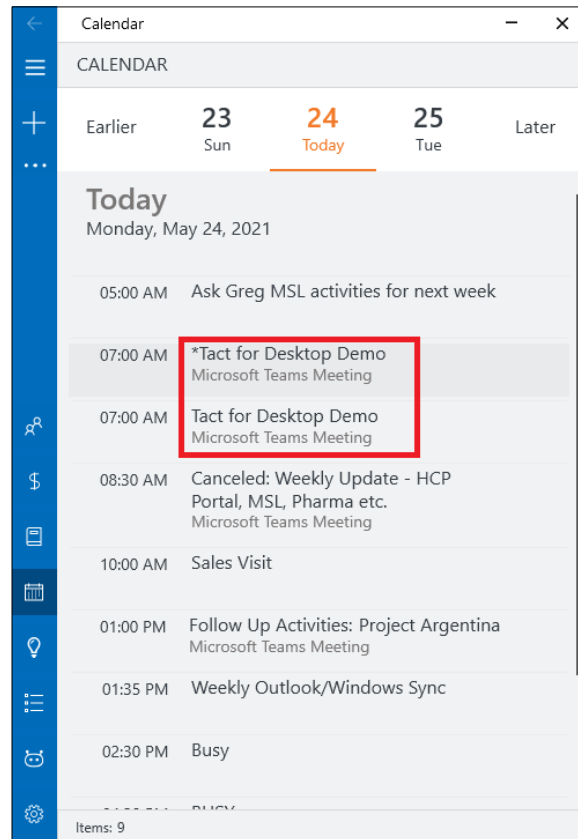
You can also create visit plans in Tact Windows by going to the calendar, clicking on the event and clicking the button “Sync to CRM”:



** This only works if you have your Tact iOS app running

4. Why do we see identical records after creating the visit plan?

When you create a visit plan using the Tact Windows app, it creates a new record which will be synced with Salesforce, therefore you will see the original event in Outlook plus the one synced with Salesforce which is currently identified with an “*” and will later be identified with a 

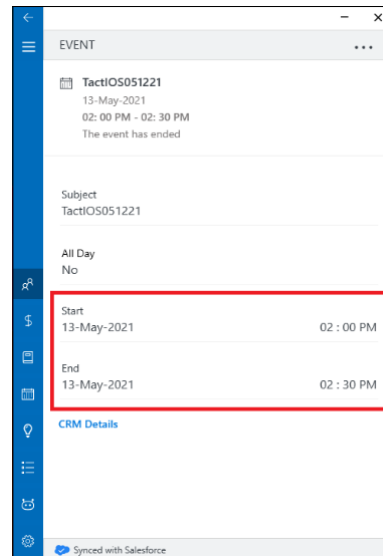
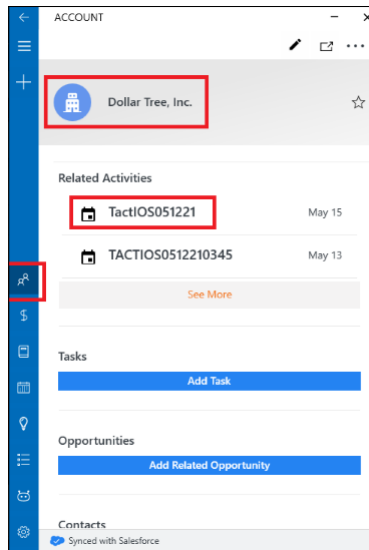


5. Can we update the visit plan once it gets created?

Yes, you can update the visit plan in Salesforce, Tact iOS or Tact Windows and the change will be reflected in all three applications.

Important Note: Keep in mind that the original event in Outlook won't be

updated and if you change the original Outlook invite, you will have to change the visit plan in Tact Windows:



6. Is there a time out for the Tact for Windows application?

The Tact app is configured to follow the same time out settings as you have with your Salesforce application and SSO setup.