

Tact Installation Guide - Windows

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Introduction

Tact Installation Guide for Windows helps you to set up Tact on Windows. This guide covers both the Tact application and Tact Outlook plugin which streamlines the workflow between your meetings and the CRM.

System Requirements

The system requirement for both Windows and iOS are listed below.

For Windows

S.No	Requirements	Details
1	Operating System	Windows 10
2	Minimum .NET Runtime Version	V4.7.2
3	Office/Outlook Version	Outlook 2013 or later
4	Browser	Internet Explorer 11 or higher
5	Language	English Only Note: You must set the language to English under Settings > Time & Language > Language .

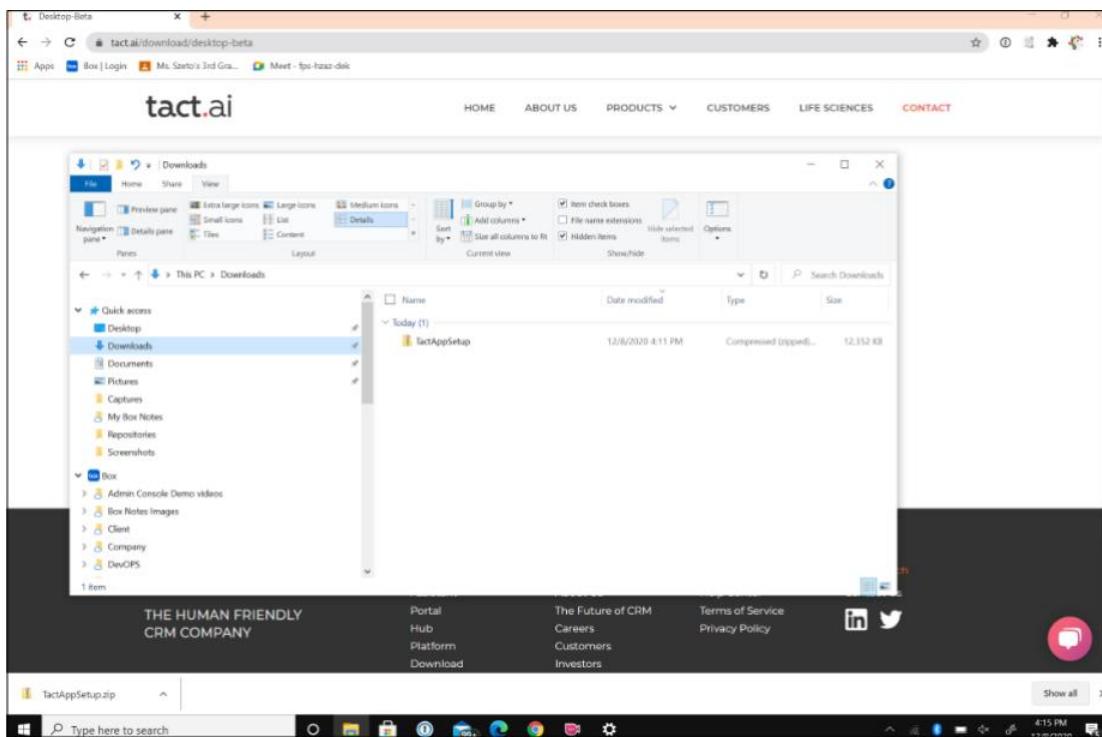
For iOS

S.No	Requirements	Details
1	Operating System	iOS Tact
2	Version	V4.1.2 (4107) required
3	Tact Calendar Permissions	Enabled Note: Your iOS Device must be synced to your Apple Calendar.

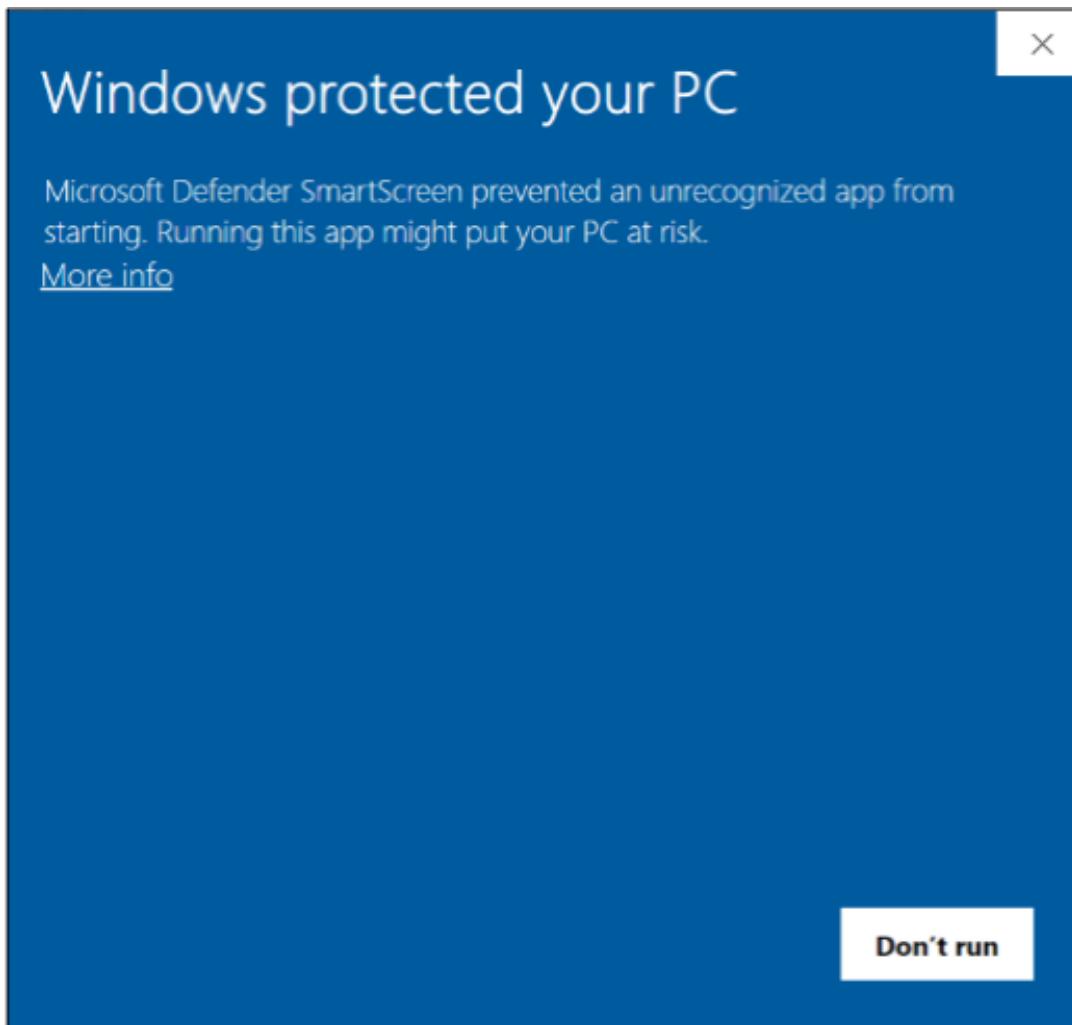
Tact Windows App

To install the Tact Windows app, follow the below steps:

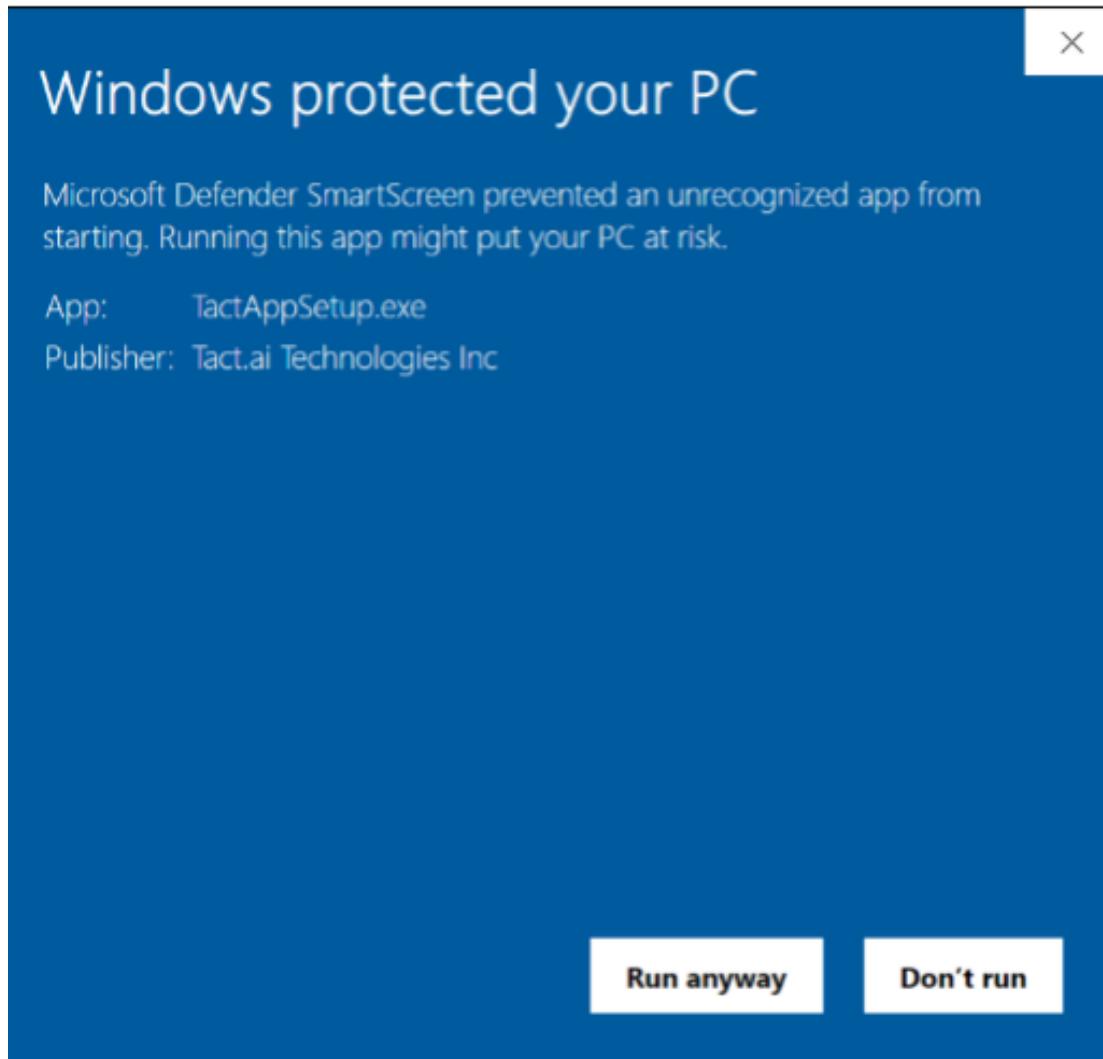
1. Go to <https://www.tact.ai/download> and download the latest version of the Tact Windows app. You can find the downloaded file <**TactAppSetup.zip**> in your **Downloads** folder.



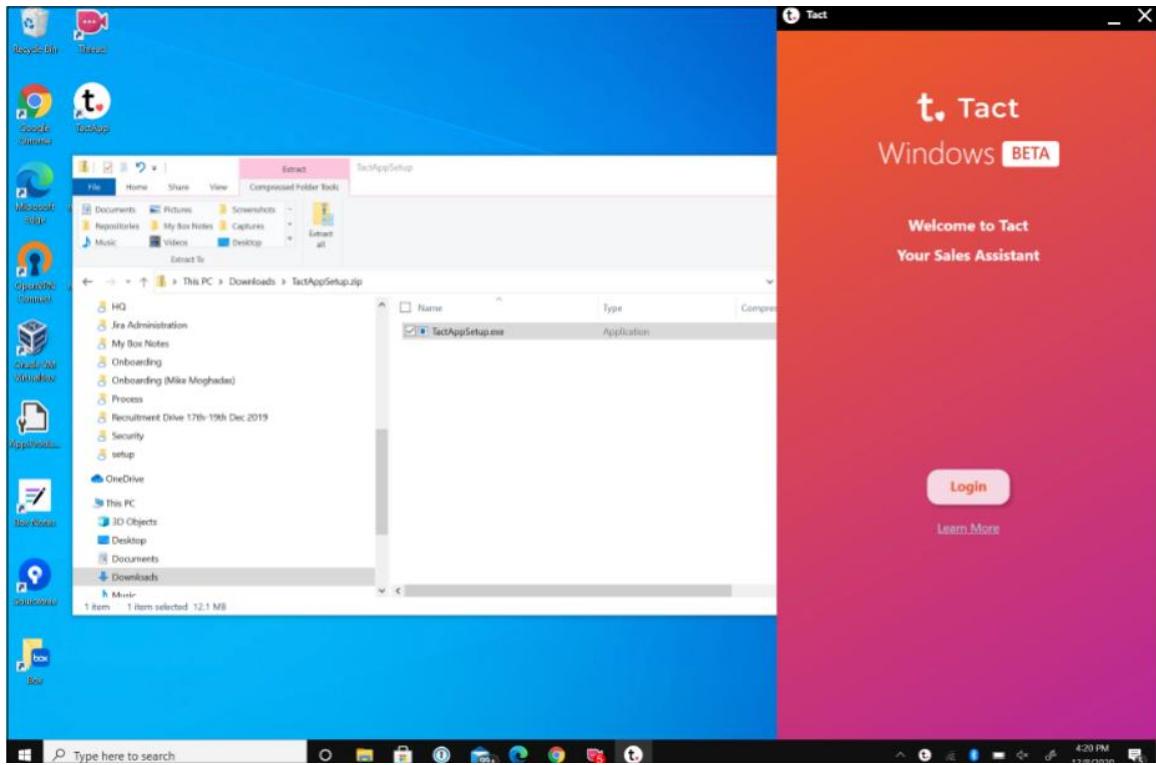
2. Extract the content of the zip file. After extraction, you can find the <**TactAppSetup.exe**> file.
3. Double-click the <**TactAppSetup.exe**> file to open the UAC screen. Refer to the image below.



4. Click **More Info**. It reveals *Tact.ai Technologies Inc* as the valid publisher of the app.



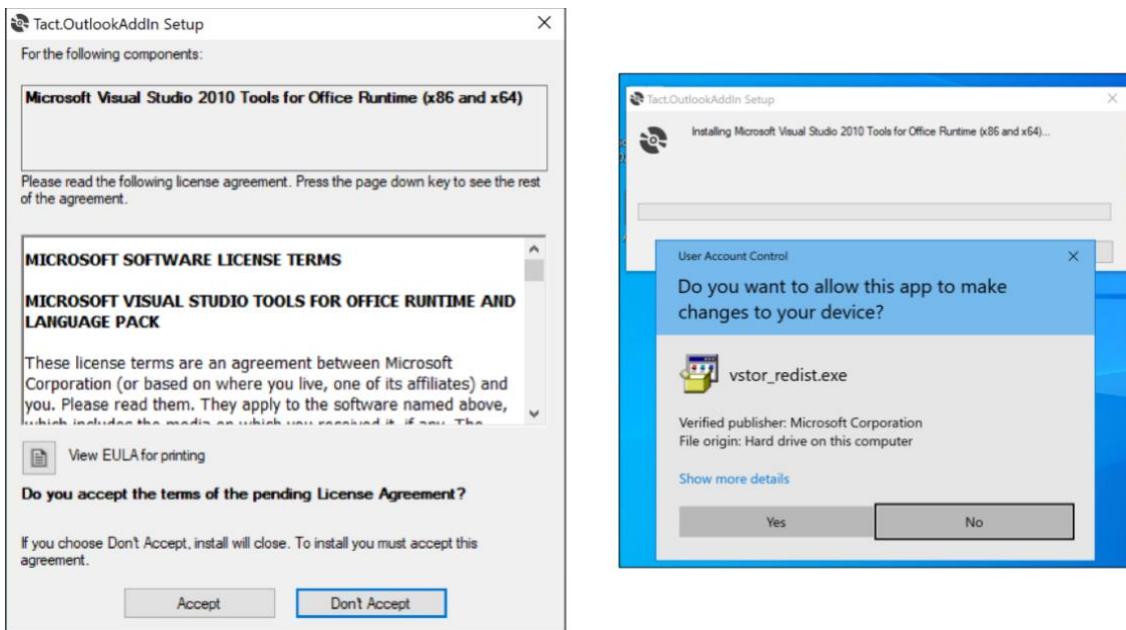
5. Click **Run anyway**. This automatically starts the installation process and the app starts up.



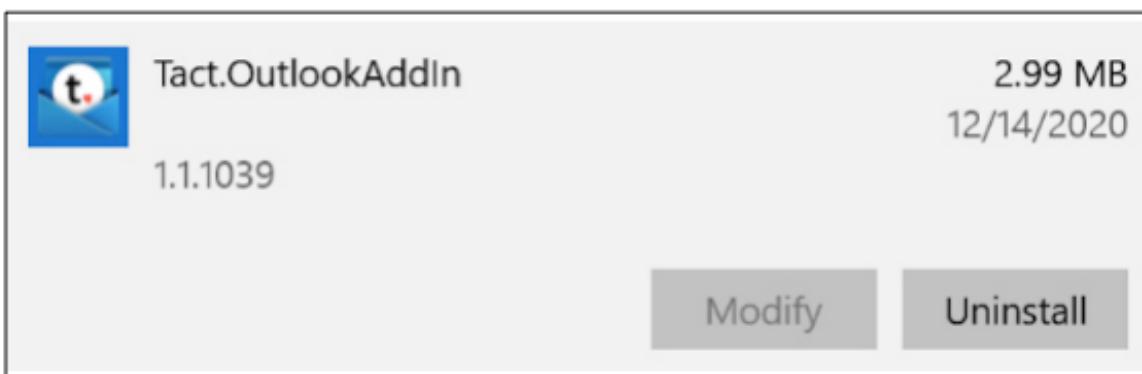
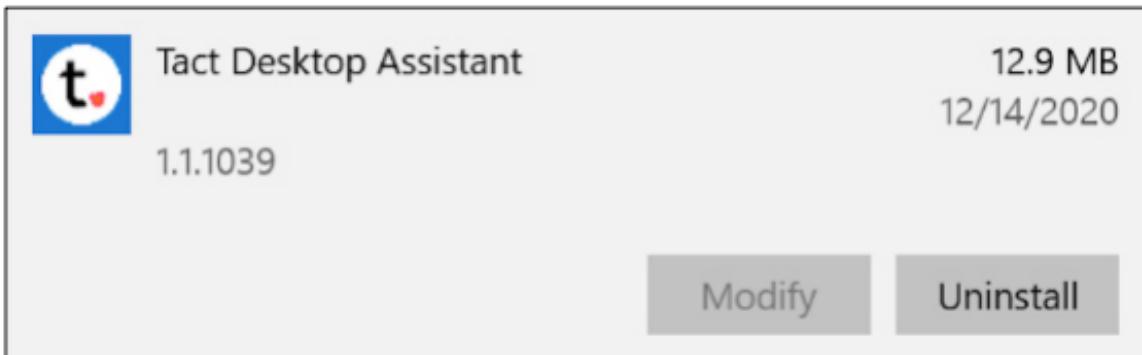
Tact Outlook Plugin

To install the Tact Outlook plugin, follow the below steps:

1. Go to <https://www.tact.ai/download> and download the latest version of the Tact Outlook plugin. You can find the downloaded file <**TactOutlookAddInSetup.zip**> in your **Downloads** folder.
2. Extract the content of the zip file. After extraction, you can find the <**TactOutlookAddInSetup.exe**> file.
3. Ensure that the Outlook app is shut down before you install 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 can find a prompt to accept the License Agreement. Click **Accept** and proceed with the installation of these pre-requisite files.



6. Open the Outlook app and you can find the add-in loaded.
7. If you find that the add-in is not loaded, check **Outlook File Manage COM add-ins**.
8. If the Tact Outlook plugin is disabled, click **Always enable this add-in**.
9. As the final step, you must confirm that the *Tact Outlook add-in* and the *Tact Desktop app* are the same versions. If they are not the same version, contact your support to provide you with installers for the same version.



Convert Installer to SCCM Package

Installer conversion to SCCM package involves:

- Convert *TactAppSetup.exe* to the SCCM package
- Convert *TactOutlookAddInSetup.msi* to the SCCM package

Convert TactAppSetup.exe to SCCM package

To convert *TactAppSetup.exe* to the SCCM package, follow the below steps:

1. Click [Create and deploy an application - Configuration Manager](#) and follow the steps.
2. If required, execute the silent install command *TactAppSetup.exe /s*.
3. If required, execute the silent uninstall command:
 - a. *cd %LocalAppData%\TactApp*
 - b. *Update.exe --uninstall /s*

Convert TactOutlookAddInSetup.msi to SCCM package

To convert *TactOutlookAddInSetup.msi* to the SCCM package, follow the below steps:

1. Click [Create and deploy an application - Configuration Manager](#) and follow the steps.

2. If required, execute the silent install command `msiexec /package TactOutlookAddInSetup.msi /quiet`.
3. If required, execute the silent uninstall command `msiexec /x TactOutlookAddInSetup.msi /quiet`
Note: Uninstallation fails silently if Outlook is running while uninstalling **AddIn** using this command. Execute the below command (point 4) to uninstall forcefully.
4. Execute this command to uninstall forcefully and silently `msiexec /x TactOutlookAddInSetup.msi /quiet FORCE=1`.
Note: This command forcefully closes Outlook before uninstalling the TactOutlookAddIn.

Tact Windows FAQs

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

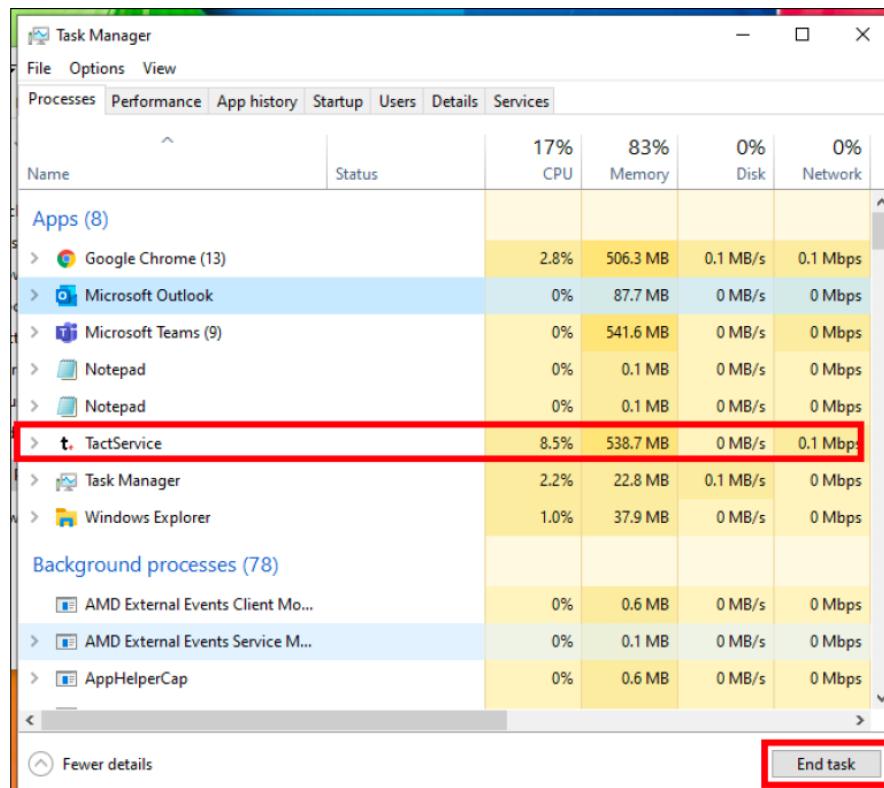
Typically, the duration of the process is between 2-5 minutes depending on the volume of records required to download. This is determined by the relevancy rules configured for your configuration. Do not exit the app, the sync will get paused.

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?

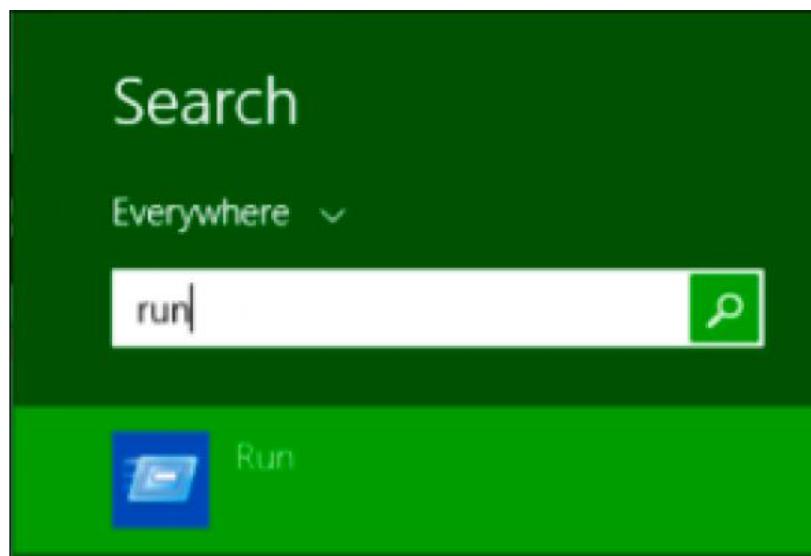
In rare instances, the sync process duration takes an excessive amount of time. In this instance, close the Tact app (right-click the app icon on the taskbar and exit) and then reopen it to reset the sync process. If you continue to experience issues in a long sync duration, follow the steps below to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

Steps:

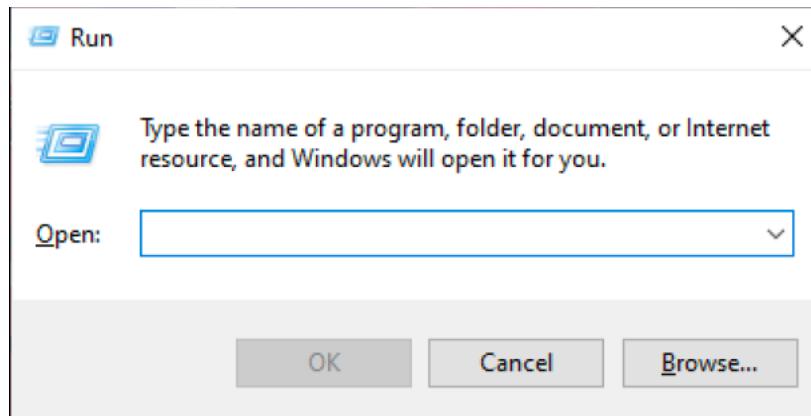
- a. To end the task on your task manager, right-click on your taskbar, select **Task Manager > TactService**, and click **End task**.



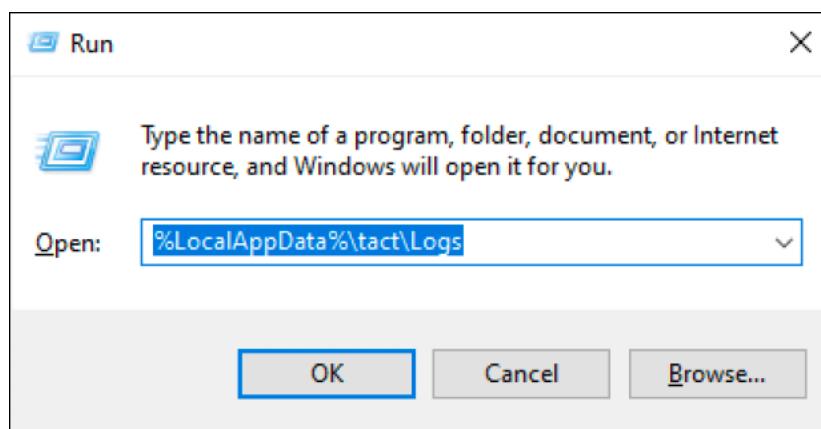
- b. To help us with the troubleshooting, please send us the log files to support@tact.ai by performing the following steps:
 - i. On Windows, type **Run** on the search bar.



- ii. Click **Enter** and you can find a pop-up window on the screen.

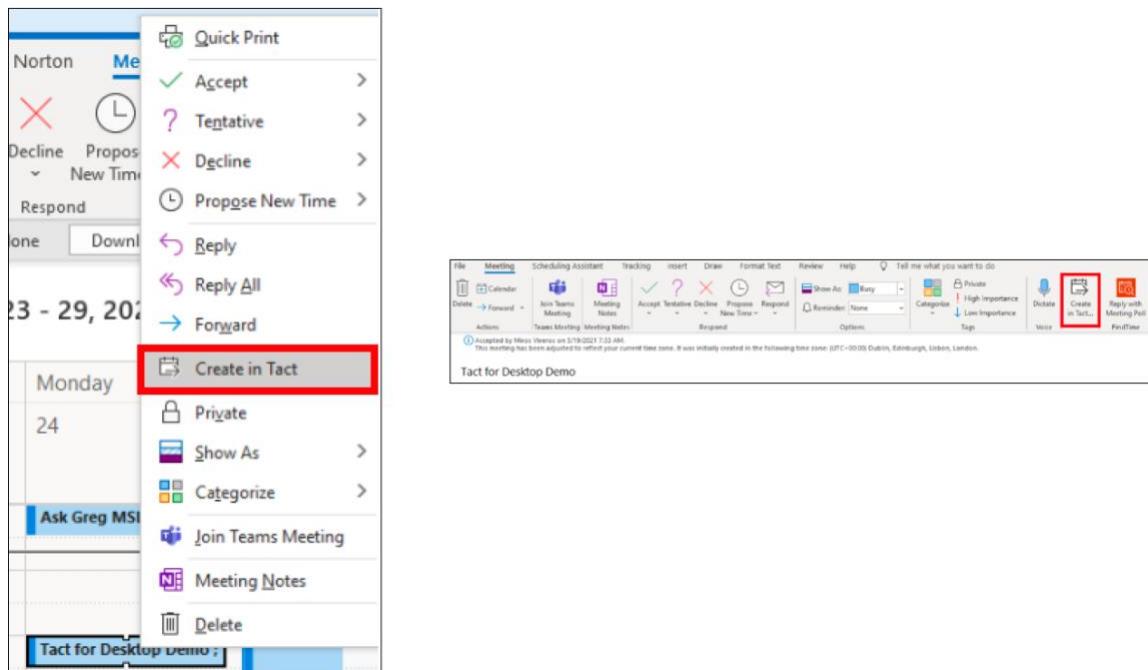


iii. Copy/paste or type %LocalAppData%\tact\Logs and click Enter.



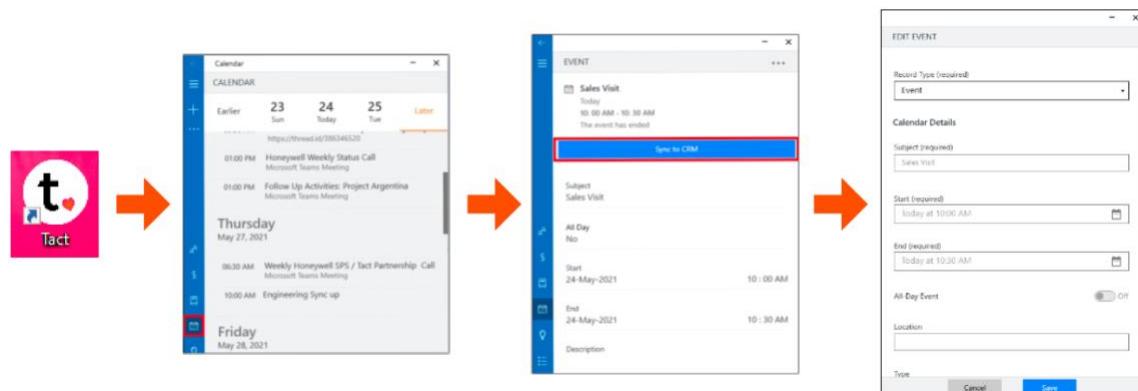
- c. A folder appears with multiple file names like **Service_2021-04-09**.
 - d. Send all the log files to support@tact.ai indicating that you were unable to complete the initial sync process.
3. How can we create visit plans?

You can create visit plans by either performing a right-click on the calendar invite or open the calendar invite and click **Create in Tact** on the menu bar:



You can also create visit plans in Tact Windows. To create visit plans, follow the below steps:

- Click the **calendar** icon on the left pane.
- Click on any of the events and click **Sync to CRM**.

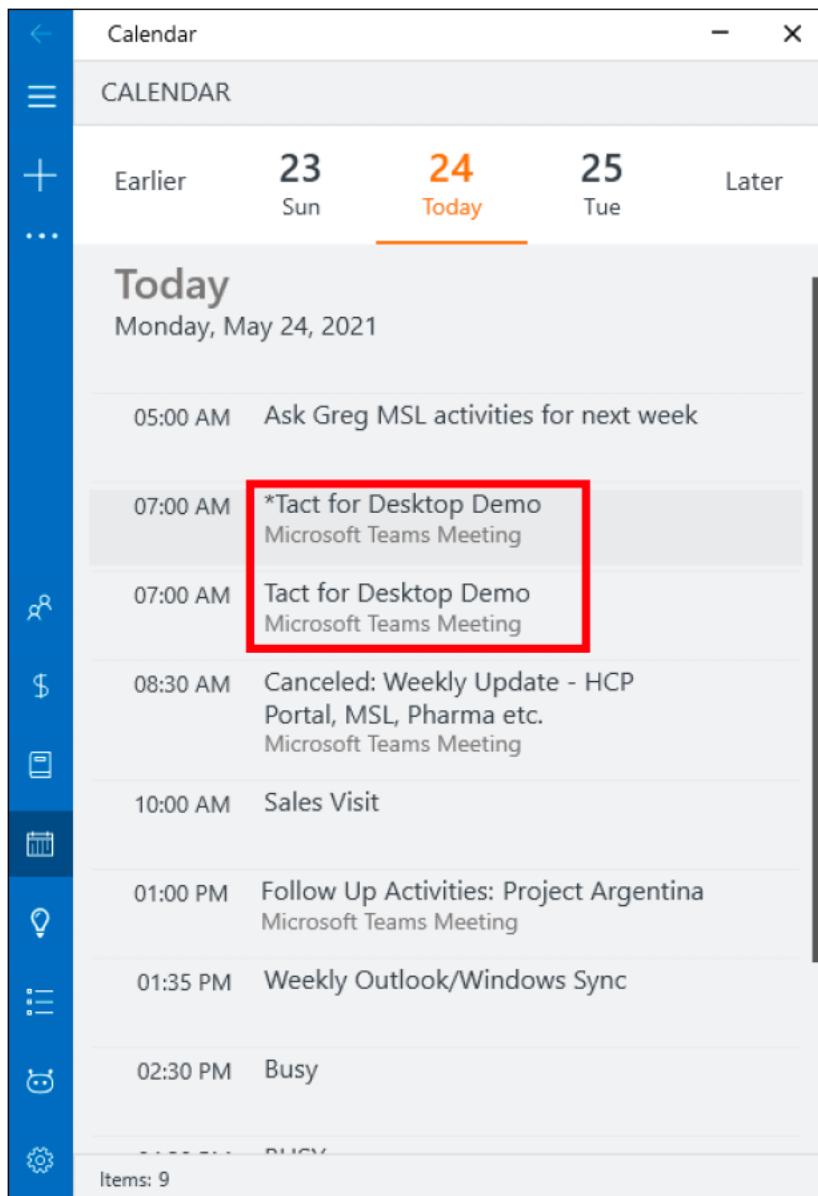


Note: This works only if you have your Tact iOS app running.

- 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 that is synced with Salesforce. Therefore, you can see the original event in Outlook and the one

synced with Salesforce which is currently identified with an * and will later be identified with .



CALENDAR

Earlier 23 24 Today 25 Later

Today
Monday, May 24, 2021

05:00 AM Ask Greg MSL activities for next week

07:00 AM *Tact for Desktop Demo
Microsoft Teams Meeting

07:00 AM Tact for Desktop Demo
Microsoft Teams Meeting

08:30 AM Canceled: Weekly Update - HCP
Portal, MSL, Pharma etc.
Microsoft Teams Meeting

10:00 AM Sales Visit

01:00 PM Follow Up Activities: Project Argentina
Microsoft Teams Meeting

01:35 PM Weekly Outlook/Windows Sync

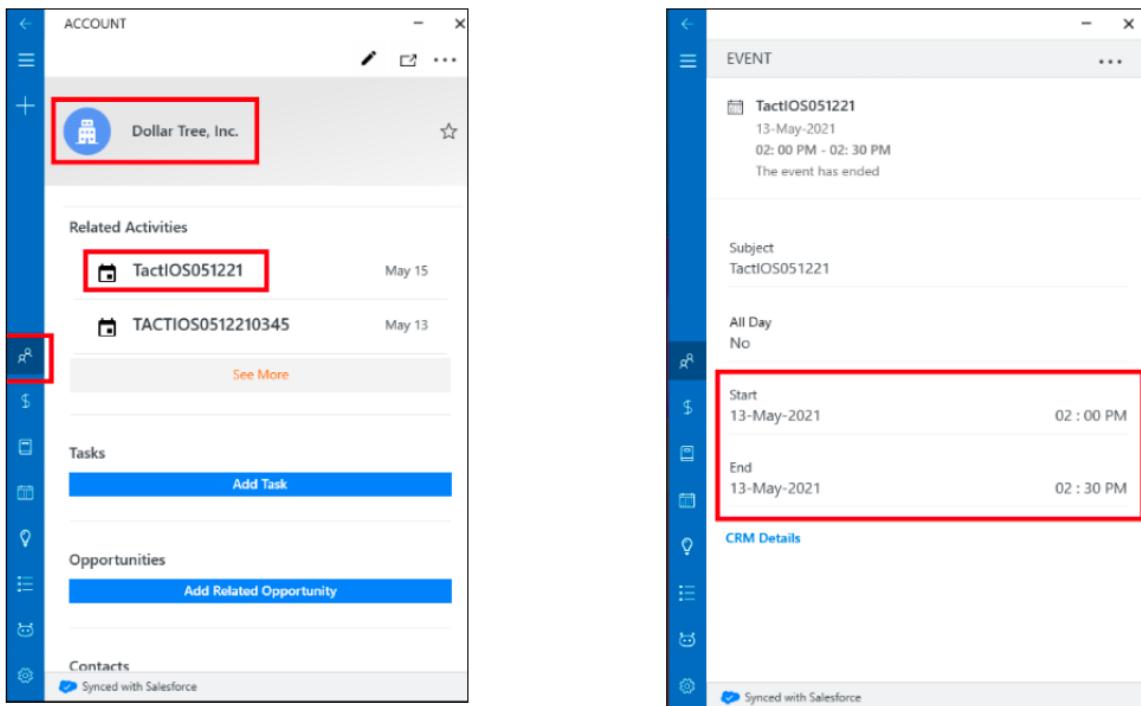
02:30 PM Busy

Items: 9

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

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

Note: Keep in mind that the original event in Outlook won't be updated and if you change the original Outlook invite, you must 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.