

Keys to a Successful Deployment

ACT! by Sage Product Family



Table of Contents

Executive Summary 3

Deployment Scenarios..... 3

 Deploying ACT! with a Local Database..... 3

 Deploying ACT! Premium with a Shared Database 4

 Deploying ACT! Premium for Web in a Corporate LAN..... 4

 ACT! Premium and ACT! Premium for Web Mixed Deployments..... 6

Conclusion..... 7

Executive Summary

ACT! by Sage Premium and ACT! by Sage Corporate Edition (which includes ACT! Premium and ACT! by Sage Premium for Web) enable an organization to configure a contact and customer management solution based on the organization's needs, whether users require online access¹, offline access, handheld mobile access, or a combination of access types. The ACT! Premium Solutions architecture allows maximum flexibility using a single and fully compatible database between ACT! Premium and ACT! Premium for Web.

The key to a successful ACT! deployment is to provide the optimum access method(s) corresponding to the user needs in the organization. This White Paper explores various deployment scenarios possible with ACT! Solutions.

Deployment Scenarios

Deploying ACT! with a Local Database

ACT! Premium and ACT! Corporate Edition can be deployed as a desktop application with a local database (Figure 1). Businesses often use this deployment approach when they want to provide ACT! as a sales productivity tool with maximum user flexibility, data ownership, and access to contact information. In this deployment scenario, each user maintains a local database on his or her desktop PC or laptop and does not share or otherwise co-mingle data with any other user's data. In this scenario, the user has complete control over the ACT! application settings and his or her own database.

A variation on this approach is to install ACT! on end-user machines, but apply a corporate-defined database schema (fields, layouts, etc.). In this approach, the ACT! end-user does not receive administrative rights to the database, which prevents the end-user from customizing the solution, compelling him or her to use corporate-defined databases, fields, and layouts. If changes defined by the corporation need to be made, an individual with administrative rights can make those changes and create a copy for users to deploy on their desktops or laptop PCs.

In both cases, the instance of ACT! is installed on a local machine that connects to a local instance of Microsoft® SQL Server® Express (which is bundled with ACT!) to maintain local databases (whether corporate-controlled or not).

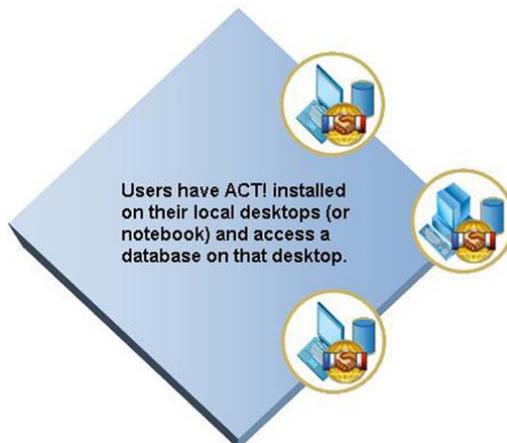


Figure 1: ACT! Deployment on Individual Users' Desktops When Each Utilizes a Local Database

¹ This feature is only available in ACT! by Sage Corporate Edition (includes ACT! Premium and ACT! Premium for Web) in North America and/or other regions. Please check your local region for availability.

Deploying ACT! Premium with a Shared Database

For organizations that want to support a team of users and maintain data and database control, ACT! Premium can be deployed to each user's PC and provide network access to a centrally shared database (Figure 2). This approach provides complete sharing with greater administrator control, since users are not managing local databases, and allows the database to be centrally deployed and managed while providing all users with real-time data access. This deployment scenario is useful for companies who wish to share data among users, require a high-level management view of the information, and retain control of the ACT! database.

For users that need offline access, that is, when they are not connected to the network, local databases can be installed on each user machine to allow synchronization with a centralized database. ACT! Premium allows full synchronization to a centralized database, using the ACT! Network Sync Server (provided with ACT! Premium). The ACT! HTTP Sync Server (provided with ACT! Premium) can be deployed if users need to sync data across the Internet without a VPN (for example, when working from home).

ACT! Premium allows deployment of multiple Network Sync Servers and HTTP Sync Servers, so traffic can be load-balanced in accordance with organization and user needs. These Sync Servers can be deployed on any machine on the network to optimize deployment flexibility and reduce costs.

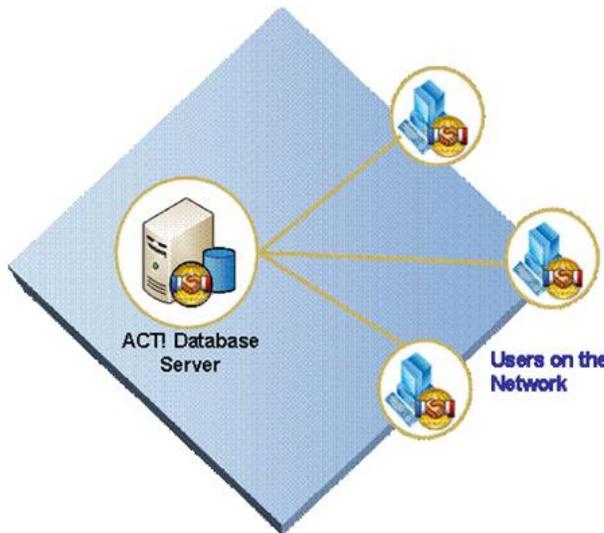


Figure 2: ACT! Premium Deployment with a Shared Database

Deploying ACT! Premium for Web² in a Corporate LAN

Often, in a larger workgroup or a corporate environment, management or IT may choose the flexibility, security, and fast roll-out of a Web-based solution. In this deployment scenario, ACT! Premium for Web and the database are installed on centrally managed servers. Users connect to the ACT! Premium database via Internet Explorer® or Safari to provide immediate access to ACT! data across a network. This method makes end-user setup straightforward, since there is no installation and configuration of software needed on the end-user's desktop. Users that need Microsoft® Outlook® e-

² This feature is only available in ACT! by Sage Corporate Edition (includes ACT! Premium and ACT! Premium for Web) in North America and/or other regions. Please check your local region for availability.

mail integration with ACT! Premium for Web simply install a plug-in from the Preference dialog box.

When deploying ACT! Premium for Web for 30 users or less, with constraints on hardware and server availability, ACT! Premium for Web and Microsoft SQL Server can be deployed on the same server (Figure 3). If access is provided to the Web server through the firewall, access to ACT! Premium for Web will be available from any PC that has Internet access and Internet Explorer installed.

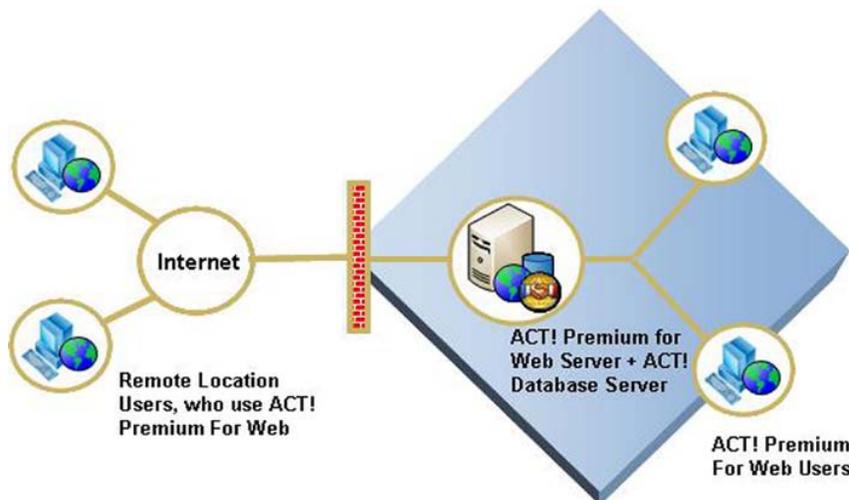


Figure 3: ACT! Premium for Web Using a Single Server

A second option is to deploy the ACT! Premium database and ACT! Premium for Web on separate servers (Figure 4). This provides increased performance and security. Multiple application servers running ACT! Premium for Web can be used to extend scalability³ with all of the servers connecting to a common database server. With this deployment:

- Microsoft SQL Server Express (bundled with ACT! Premium for Web) is installed and configured on a dedicated server.
- ACT! Premium for Web is installed on one or more application servers to accommodate the needed number of users.

The benefit of the ACT! Premium for Web solution is that IT has full control of the solution deployment, setup, and database. This greatly speeds and simplifies roll-outs, improves reliability, and enables users to be quickly added or deleted, while providing complete data security. With ACT! Premium for Web, database administration and control is completely in the hands of experienced and authorized personnel. Users simply connect to the database using their browser.

³ Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at www.act.com/2010systreq are based on single user environments. You must purchase one license of ACT! per user.

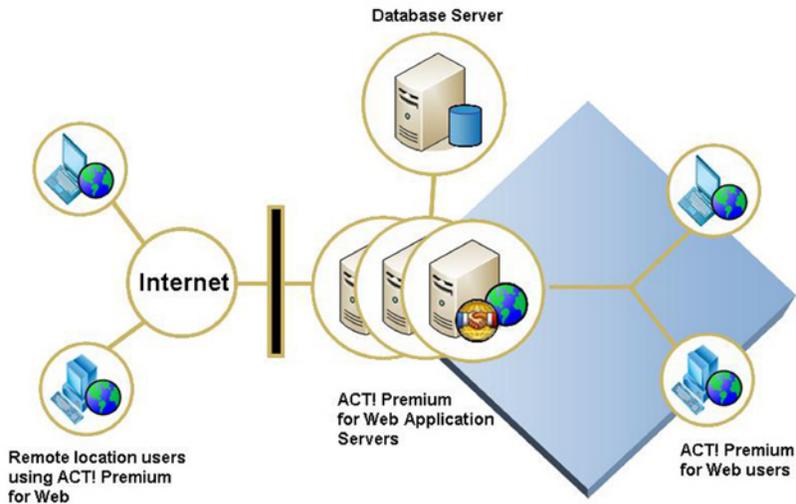


Figure 4: ACT! Premium for Web Multi-Server Deployment

ACT! Premium and ACT! Premium for Web⁴ Mixed Deployments

To support a varying set of user needs (including connected, disconnected, and offline access) and maintain maximum flexibility, organizations can deploy ACT! Premium or ACT! Corporate Edition in a mixed desktop and Web environment (Figure 5). Mixed scenarios provide instant anywhere, anytime access through ACT! Premium for Web, while allowing disconnected/offline access using ACT! Premium for users who need this functionality. Furthermore, in this deployment, both ACT! Premium and ACT! Premium for Web users share a common database and customizations⁵ to layouts, reports, and fields, enabling IT to administer and customize one environment and allowing users to choose their access method⁶.

ACT! Premium Solutions deliver this flexibility through a single ACT! Premium Solutions license per user that enables ACT! Premium and/or ACT! Premium for Web access. ACT! Premium Solutions allow an organization the flexibility to support access methods based on varying business and user needs. A mixed environment allows ACT! Premium and ACT! Premium for Web users to share a database, while maintaining compatibility with Sync Servers to support the disconnected deployment model where remote databases are synchronized with the master database.

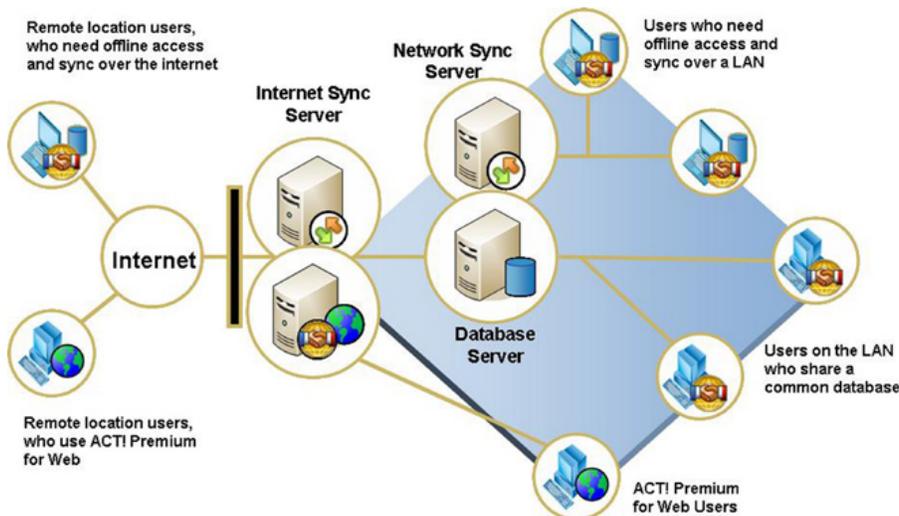


Figure 5: ACT! Premium / ACT! Premium for Web Mixed Deployment

4 This feature is only available in ACT! by Sage Corporate Edition (includes ACT! Premium and ACT! Premium for Web) in North America and/or other regions. Please check your local region for availability.

5 In ACT! Premium for Web, administrative functions must be performed on the Web server

6 When used in conjunction with each other, ACT! Premium and ACT! Premium for Web editions must be the same version.

Conclusion

The key to a successful ACT! deployment is to provide optimal access method(s) for users. ACT! Solutions offer a range of scalable deployment options to meet a wide variety of organizational scenarios.

These deployment options provide both offline and online access to business-critical, centralized contact data, with the ability to mix-and-match the ACT! products deployed, depending on specific organizational needs.

Important Note: Review ACT! system requirements at www.act.com/2010systreq. You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. **Compatibility:** Due to new functionality available in ACT! 2010, we strongly recommend contacting your add-on product provider to confirm compatibility. Using versions of the add-on product that have not been confirmed compatible by the vendor may result in features behaving differently or not appearing within ACT! 2010. Visit www.actsolutions.com or contact your add-on product provider to help determine compatibility.

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About ACT!

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.