ACT!
by Sage

Keys to a Successful
ACT! by Sage Deployment

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Your business in mind.

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Executive Summary

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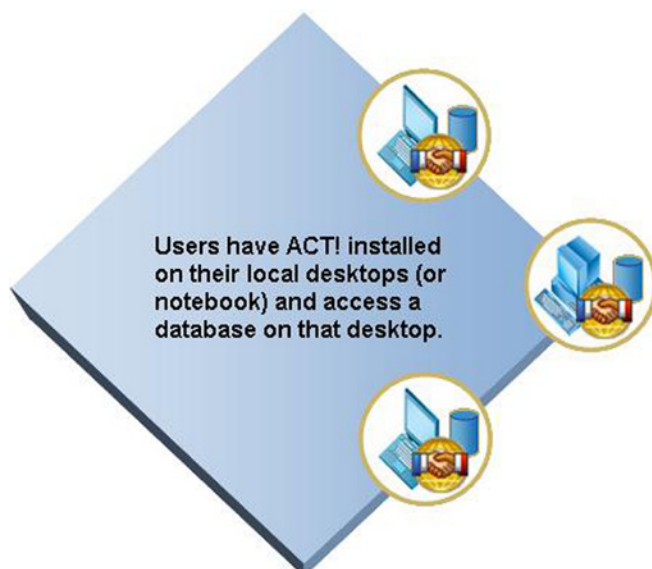

Figure 1: ACT! Deployment on Individual Users' Desktops When Each Utilizes a Local Database

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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.
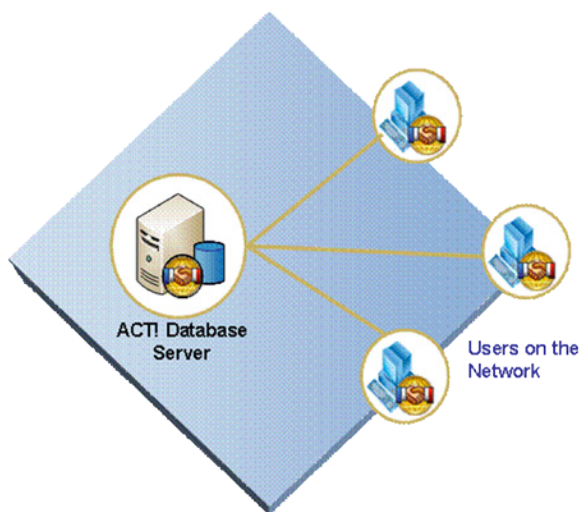

Figure 2: ACT! Premium Deployment with a Shared Database

Deploying ACT! Premium for Web 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® 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-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.
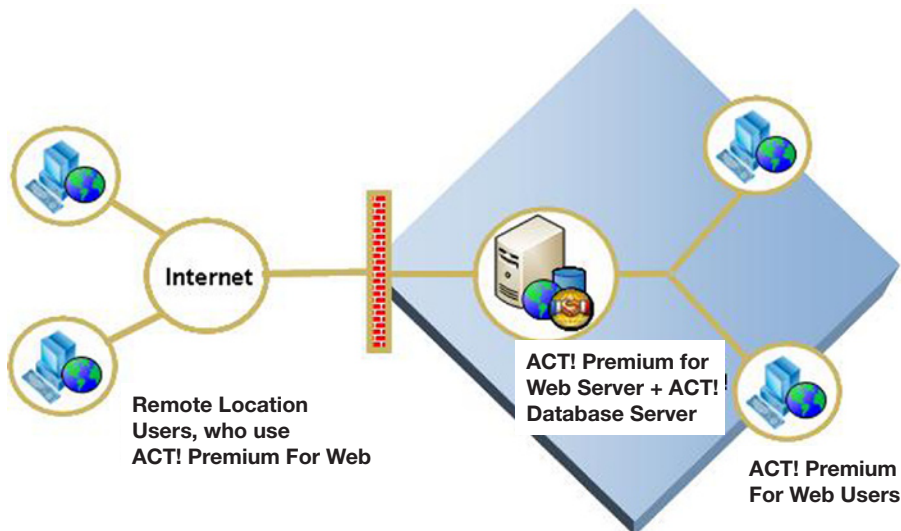
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Figure 3: ACT! Premium for Web Using a Single Server

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 scalability[1] with all of the servers connecting to a common database server. With this deployment:

- Microsoft SQL Server (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.
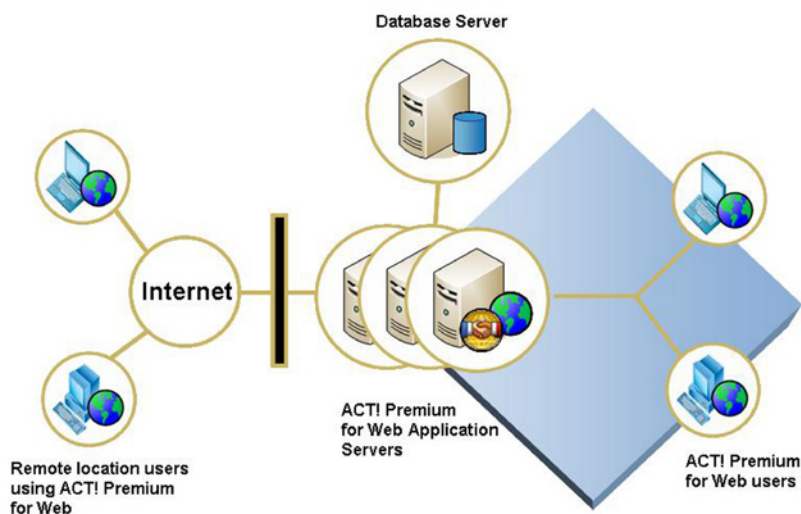

1   Published minimum system requirements are based on single user environments. Actual scalability and number of networked users supported will vary based on hardware and size and usage of your database. Sage Software scalability recommendations are based on in-house performance tests using the recommended server system requirements found at: www.act.com/2008systreq. You must purchase one license of ACT! per user.

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

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ACT! Premium and ACT! Premium for Web 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 solutions 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 customizations[2] to layouts, reports, and fields, enabling IT to administer and customize one environment and allowing users to choose their access method[3].

ACT! by Sage Premium Dual Access delivers this flexibility through a single ACT! Premium Dual Access license per user that enables ACT! Premium and/or ACT! Premium for Web access. ACT! Premium Dual Access allows 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.
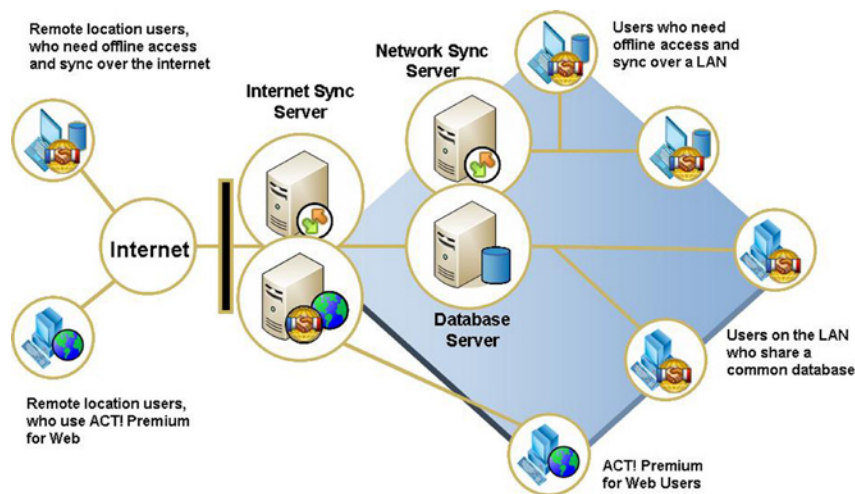

Figure 5: ACT! Premium / ACT! Premium for Web Mixed Deployment

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.

2   In ACT! Premium for Web, this operation must be performed on the Web server.

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

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