

**Allied Financial Software Knowledgebase**

**ACT! by Sage 2010 White Papers**

**ACT! by Sage Solutions Whitepapers**

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ACT! by Sage 2010: Delivering on Usability and Productivity

This whitepaper discusses how in the past year, Sage Global CRM Solutions has increased efforts related to usability, and therefore, implemented a progressive program of customer research involving hundreds of customers and partners. To determine the quality of the ACT! 2010 design compared to the competition, Sage conducted a Keystroke Level Modeling (KLM) study of ACT! and five competitors. The results of the KLM study presented in this paper show that ACT! was rated number one in user productivity, while Microsoft® and Salesforce.com finished 5th and 6th respectively. Overall, ACT! was rated as most efficient with on average 17% higher productivity than competitors. Notably, the same tasks take 25% longer to complete in Microsoft Dynamics® CRM and 37% longer using Salesforce.com. [top] ACT! by Sage and Social CRM - Part 1

This whitepaper helps to address the following questions on your mind: Would you like to learn how social media can benefit your business? Are you concerned about managing your reputation online? It also discusses how businesses all around the world are using some of the most popular sites and networks on the web, from Twitter®, to YouTube®, to make their business more accessible, more personable, and maintain long term connections. In turn lots of this information can be linked to your CRM or contact management software to help improve customer relations. [top] ACT! Reporting and Data Access Methods

Summary: This whitepaper discusses the technical aspects of the ACT! reporting and data access methods. For example, the ACT! architecture provides four additional data access methods that can be used for querying, reporting and data extraction: ACT! OLE DB Reporting Provider, ACT! Reader Utility and account (ACT! Premium only), ACT! Password Utility (ACT! Premium only), ACT! SDK (Software Developers Kit). [top] Factors That Affect ACT! Performance for Individual Users

Summary: When considering the overall performance of your ACT! by Sage solution, ACT! individual users need to balance their hardware investment, expectations for application performance, customer and prospect expectations, business needs, and reasonable Return on Investment (ROI). This whitepaper examines the factors that affect ACT! application performance for the individual user. It includes results of testing performed by an independent benchmark testing company using ACT! by Sage 2006 (8.0), as well as testing performed by Sage on subsequent ACT! versions. [top] Scalability Results for ACT! by Sage Premium Solutions

Summary: Organizations using ACT! by Sage solutions require high levels of performance, reliability, and scalability to match user, management, and IT expectations. They also need to balance infrastructure costs to deliver an acceptable Return on Investment (ROI). This whitepaper provides performance and scalability test results and hardware recommendations to deliver a cost effective and positive end-user experience. While each individual company's needs differ, this whitepaper provides guidance to help an organization select a hardware configuration to optimize performance across a variety of deployment scenarios and user counts. [top] ACT! by Sage Architecture, Customization, and Integration

Summary: This whitepaper discusses the ACT! product family architecture, deployment methods, customization, and integration capabilities with other products and is intended for IT managers or system administrators who want to better understand the underlying platform and capabilities. Some of the features discussed are only applicable to a specific product or tier, and these have been highlighted as appropriate. Further, some of the user features are only available to certain user roles such as Administrators or Managers. Sage Software recommends that you consult your product documentation for a complete list of

features, applicability, and integrations. [top] [Keys to a Successful ACT! Deployment](#)

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, 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! 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 whitepaper explores various deployment scenarios possible with ACT! solutions. [top] [ACT! Security Model](#)

Summary: ACT! centralizes and manages business-critical contact information for organizations of every size. The ACT! security model was developed to support stand-alone and workgroup implementations and provide consistency and flexibility to managers and IT personnel charged with protecting contact information. ACT! security works in two ways, enabling data access by user role and data level. Users are assigned an ACT! user role based on the appropriate access level for their position in the organization, from "browse only" to "full administrative access." Data security can be enforced at the database level, the feature level, the record level, and the field level. [top] [ACT! Synchronization Architecture](#)

Summary: This whitepaper provides an overview of the ACT! sync model, including a description of the key features, abilities, and concepts. It is directed at current users and potential customers seeking to perform a functional and technical evaluation of the product. Diagrams and examples are provided where appropriate, as well as greater detail on Internet synchronization, focusing on setup and configuration. [top] [Using ACT! Premium in Microsoft® Terminal Server or Citrix® Presentation Server Environments](#)

The whitepaper explores the benefits of deploying ACT! Premium through Terminal Services, outlines deployment requirements and recommendations, and provides installation and performance tips. It is intended for IT Administrators who are considering deployment of ACT! using Microsoft Terminal Services, with or without Citrix. [top] [Managing Customer Relationships: The Choice Between What's Cheap and What Works](#)

Authored by Aberdeen, this research document will examine the benefits of free and paid CM solutions for small-to-medium sized businesses. Organizations in need of a sales automation solution to manage account, contact, and company information will be advised on how to select a CM tool that can satisfy short-term needs and meet long-term goal. [top] [CRM: A Business Imperative for Companies During the Global Economic Downturn](#)

This whitepaper examines how Sage is working with small and medium sized businesses today to help them protect and grow their revenues during the economic downturn through the use of Customer Relationship Management (CRM) software. [top] [Automating Success: The Choice Between Contact Management and Customer Relationship Management](#)

Authored by Aberdeen, this whitepaper will enable users to determine which solution best fits their business type, as well as the organizational capabilities necessary to ensure the successful adoption of a Contact Management or Customer Relationship Management solution. [top]

