



Act! Integration and Deployment

Understanding Integration and Deployment Options

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Introduction

This whitepaper is written for IT managers or system administrators who want a better understanding of the integration capabilities and deployment methods available in Act!.

Integration Overview

Act! provides many integration points with the Microsoft® Office suite of products to leverage email, word processing, data sync capabilities and more. Act! also provides a connection to Google™ contacts, calendar, and email. In addition, you can use accounting integration capabilities to share information between Act! and a supported accounting application.

Integration with Microsoft Office

Integration with Microsoft Office is achieved in some cases by embedding the Object Models, such as exporting to Excel®, or by targeted application add-ons, such as the Act! add-on for Microsoft Outlook® that installs with Act!.

Act! integrates with Microsoft Office, Google, and select accounting applications.



Figure 1: Microsoft Office Integration

Integration with Microsoft Outlook

Integration with Microsoft Outlook includes calendar, contact, and email integration.

Calendar Integration

If users schedule some appointments and tasks in Act! and some in Outlook, they may find it helpful to view all calls, meetings, and to-dos on a single calendar in either application. Calendar updating lets users sync their Act! and Outlook calendars. Users can view Outlook activities on Act! calendars, in the Task List, and in the Activities tab. Synchronizing the calendar can be scheduled at a time convenient for the way you work. Activities synchronizing from Outlook will be associated with contacts in Act! that share the same email address. Users can modify activities and clear them for complete history. Act! activity scheduling can be done from Outlook emails.

Act! supports sending calendar invitations in the iCalendar format (directly supported by Microsoft Outlook and Apple® iCal®), online calendaring applications such as Google Calendar™, Yahoo!® Calendar, and Windows Live® Calendar, Lotus Notes®, and some social applications. Users can customize alarm settings and automatically create Act! activities when accepting Outlook invitations for an enhanced Outlook and Act! integrated experience.

Email Integration

Integration with Outlook email allows users to benefit from Outlook email capabilities while integrating with Act! core components.

There are four integration points:

1. **Sending and receiving emails using the Act! email client** – The Act! email client is an interface that sits in front of Outlook. Users send and view email in this interface, which provides additional functionality over Outlook and other forms of email integration. For example, users can create Act! activities from emails, quickly look up contacts from emails received, and attach emails to group or company records. The Act! email client is only available in Act! Pro and Act! Premium.

2. **Using Outlook email while in Act!** – Users may want to send email from within Act! using Outlook rather than the Act! email client. If this option is selected, everything from mail merge to clicking hyperlinks will use the Outlook email client.
3. **Integrating address books** – If users utilize Microsoft Outlook to send and receive email messages, they can add an Act! address book to the Outlook application. When a user writes a message, they can select Act! contacts to send it to, and record it to the contacts' history.
4. **Attaching email to Act! contacts** – Attaching emails can be done en masse or on a case-by-case basis. For emails sent from Outlook, Act! can compare any email address in the To:, From:, or CC/BCC field and create a history record for the appropriate Act! contacts.

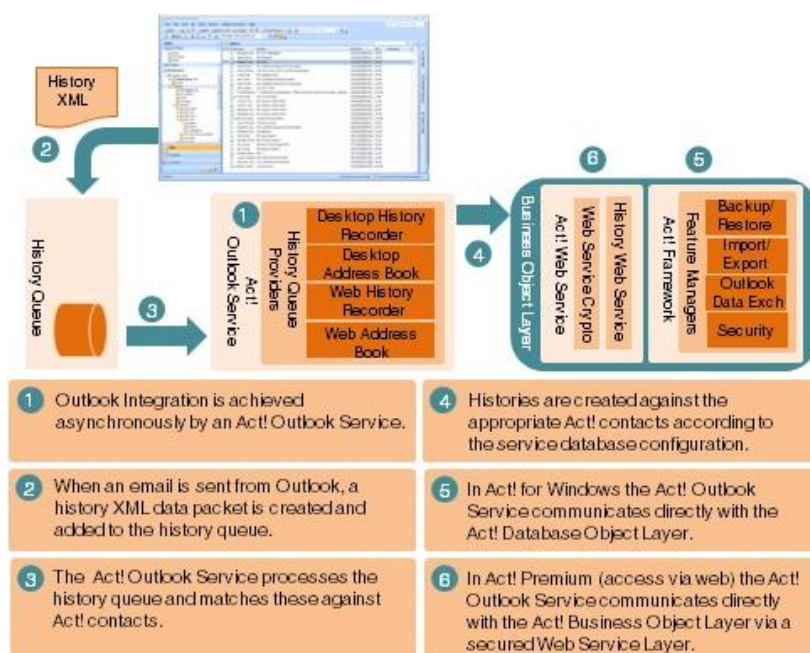


Figure 2: Outlook email Integration

Integration with Outlook Contacts

With Act!, users can synchronize contact data from Outlook contacts or import from a user's Contacts folder located on the user's computer or the Microsoft Exchange Server. Edits made in either system will synchronize either on a schedule or a manual request.

Further, when using Outlook as the email client, a user can create a contact in Act! with one click.¹ Act! provides an Outlook add-in, which is installed with Act!. This add-in enables easy contact creation from the Outlook email client. Contacts that are created will adhere to the database preference for access of new contacts (private or public).

Lastly, Act! contacts can be exported to vCard format, which is supported directly by Outlook, Apple Address Book, many mobile device platforms including iPhone® and Windows Mobile, as well as Lotus Notes, and some social applications. Export functionality is restricted to certain user roles.



Figure 3: Creating a contact from the Outlook Email Client

Integration with Microsoft Word

With Act! and Act! Premium, users can specify Microsoft Word as the word processing tool for creating or modifying documents and templates. Act! Premium (access via web) users must install a component to use Word with the Web client. Act! adds a menu to Word; from that menu a user can attach a document to a contact record, send a document in an email message or fax, and display the mail merge fields.

¹ This feature is not available in Act! Premium (access via web).

Integration with Microsoft Excel

A user can export the Contact List, Group List, and Company List data to Microsoft Excel, if Excel is installed on the user's machine. It is also possible to export Opportunity List data to Excel and display pivot table information and analysis automatically. Export to Excel is limited to certain user roles. In Act! Premium, a permission to export to Excel can be granted or removed. However, in Act! Pro, this permission is granted by default and cannot be removed.

The columns and data shown on the Act! list view are retained in Excel. Further, Act! adds a menu to Excel, and from that menu a user can attach a spreadsheet to a contact record and even map contact, group, or company fields to Excel spreadsheets.

Google Integration

Integration with Google includes calendar, contact, and email integration.

Calendar Integration

If users schedule some appointments and tasks in Act! and some in Google, they may find it helpful to view all activities on a single calendar in either application. Calendar integration lets users sync their Act! and Google calendars. Users can view Google events on Act! calendars, in the Task List, and in the Activities tab. Synchronizing the calendar can be scheduled at a time convenient for the way you work. Events synchronizing from Google will be associated with contacts in Act! that share the same email address.

Users can customize alarm settings and automatically create Act! activities when accepting Google calendar invitations for an enhanced Google and Act! integrated experience.

Email Integration

Integration with Google email allows users to benefit from Google email capabilities while integrating with Act! core components.

Users can export Opportunity List data to Excel and display pivot table information and analysis automatically.

There are two integration points:

1. **Importing History** – Users may want to record previously sent emails as history to their Act! contacts. Act can compare any email address in the To:, From:, or CC/BCC field and create a history record for the appropriate Act! contacts based on a date range.
2. **Attaching email to Act! contacts** – For emails sent from Google, Act! can compare any email address in the To:, From:, or CC/BCC field and create a history record for the appropriate Act! contacts.

Integration with Google Contacts

With Act!, users can synchronize contact data from a Google My Contacts list. Edits made in either system will synchronize either on a schedule or a manual request. Further, when using Google as the email client, a user can record a history of Gmail messages to Act! contacts. By recording a history of email messages, you can see all interactions for a contact in one place.

Other Email Applications

Act! and Act! Premium integrate with Lotus Notes®, Eudora®, and POP3 accounts, delivering all the benefits of Act! email, such as attaching inbound emails to contacts, creating new contacts and activities from the email sender, and creating contact history on the contact record when sending emails, while still using Lotus Notes.

Internet Services Integration

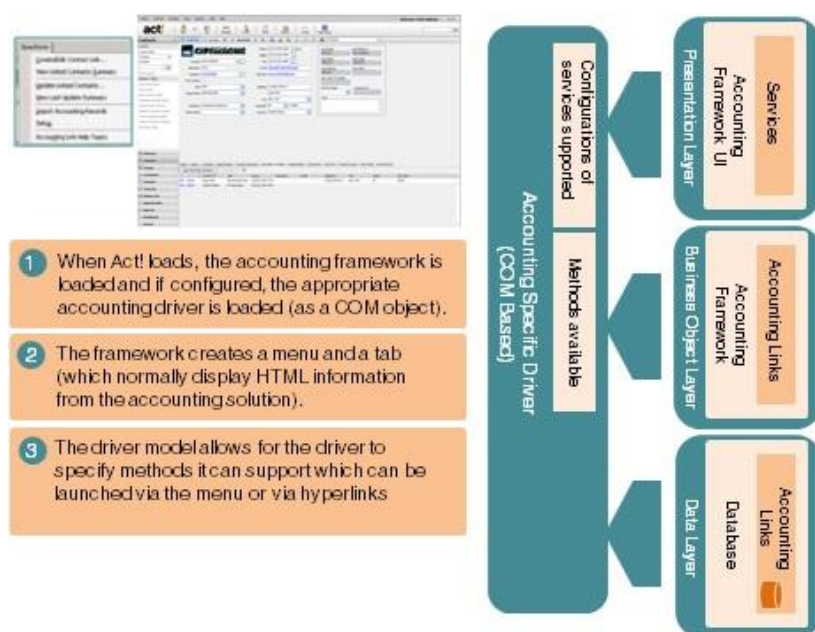
The Welcome page provides direct links to Act! products, services, support, and other web pages. To use the Welcome page, users need Internet access.

The Web Info and Social Updates tabs offer access to social media, reference, and research sites such as LinkedIn®, Facebook®, and Google Maps™ (the reference and research sites will vary according to your country).

Users can also attach a web page to a contact by opening the web page and clicking the Attach Web page to Act! contact button in the toolbar.² The details of the attached web page appear on the History tab for the selected contacts.

Accounting Integration

The Act! Accounting Framework provides the ability to integrate Act! with a variety of accounting applications. This integration provides a complete view of all customer interactions for inquiry handling and performing follow-up tasks, and it eliminates duplicate data entry.



The Act! platform is a platform for third-party development to extend, integrate with, and connect to Act!.

Figure 4: Accounting framework integration

Using accounting links, access to accounting information is provided from a tab in Act!. Users are able to see Estimates, Invoices, Sales, and Payments for any linked contact, giving them a more detailed view of their relationship history.

² This feature is not available in Act! Premium (access via web).

Extensibility Model

The Act! platform is not just a foundation for all Act! product lines, but also a platform for third-party development to extend, integrate with, and connect to Act!. The Act! Framework is available as part of the Act! SDK. This gives third parties the same first-class availability of the Act! platform.

Each tier in the Act! architecture has one or more unique extensibility points with their own particular capabilities. Act! custom solution development involves knowing and choosing the right extensibility path(s), understanding each tier, its capabilities and extensibility, and matching the problem domain with the appropriate extensibility point(s).

Accessing Act! Business Objects from an External Application

The Act! Framework can be consumed when integration is needed from outside the realm of Act! and when no interaction with the application or user interface is needed. Applications and Windows® services can consume the framework to access data, automate functionality, and provide back-end services. Web applications and web services can consume the framework to provide clients or back-end solutions across network boundaries.

External applications can easily access Act! data by the implementation of .NET interfaces "ITypedList" and "IBindingList" which allow you to bind collections to UI controls. For example, retrieving a list of contacts from Act! and populating a .NET ComboBox with the FullName of the contacts can be achieved with five lines of code.

```
ActFramework framework = new ActFramework();
framework.LogOn("ACT_user_name", "password", "server_host", "database_name");
// get all contacts in the database
ContactList contacts = framework.Contacts.GetContacts(null);

// note that since ContactList implements ITypedList and IBindingList,
// then it can be used as a datasource for any databound control in .net
this.comboBox1.DataSource = contacts;
this.comboBox1.DisplayMember = "FullName";
```

Figure 5: Accessing Act! data from an external application

Extending the Act! Application

The Act! application has several extensibility points: plug-ins, custom controls, and custom tabs. Each can be used independently to provide new functionality or they can be used together to provide larger solutions.

Plug-ins

Plug-ins enable third parties to behaviorally and/or visually extend the application. Plug-ins can also serve as gateways to other applications or services which need live interaction with the application. Plug-ins are passed a reference when Act! is loaded and can access all of the application (and framework). Typically, plug-ins will subscribe and react to events in the application and framework to perform some specialized functionality.

Custom tabs can also be added to provide new ways to view data in Act! detail views. You can use custom tabs to organize your domain-specific fields, whether custom fields or predefined fields, in an easy-to-find location.

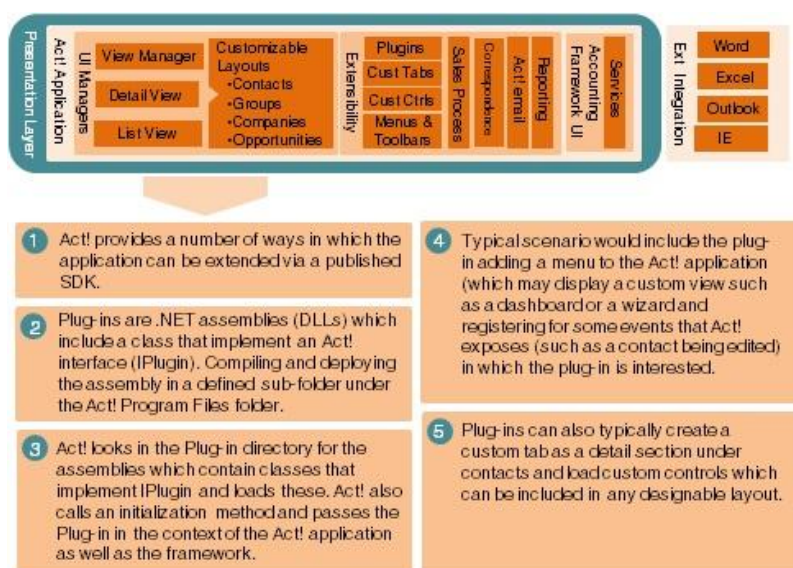


Figure 6: Act! plug-in model

Custom Controls

Custom controls can provide visual extensions to the application's designable views, namely, contact, group, and company detail views, and can support rich,

design-time behavior and integration with the layout designer. For example, you can create a custom control displaying contact-related database records contained in an external application within a grid in an Act! layout.

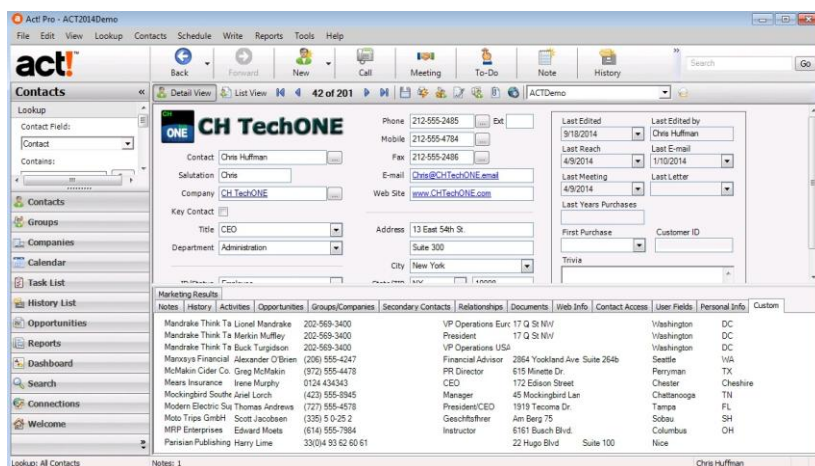


Figure 31: Example custom control: display structured data in a contact layout

Custom Dashboard Components

Custom dashboard components can provide visual extensions to the Act! dashboard and can support rich, design-time behavior and integration with the Dashboard Designer. Creating a dashboard custom component is similar to creating a layout custom control. Act! provides a base custom dashboard component, so your custom component looks and feels like a native Act! dashboard component.

Composite Application Support

Act! has composite application support, which enables third-party applications to leverage some Act! User Interface elements without Act! running. For example, a system may want to launch the Act! Schedule Activity dialog box for a user to schedule an activity, or create a contact in the Act! database.

Act! allows you to configure a deployment solution based on your organization's needs.

Deployment

Act! allows you to configure a deployment solution based on your organization's needs. Since the Act! architecture allows maximum flexibility, the key to a successful deployment is to provide the optimum access method(s) corresponding to your user needs.

Deploying Act! with a Local Database

Act! can be deployed as a desktop application with a local database. Organizations 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! user does not receive administrative rights to the database, which prevents the 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 locally.

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 7: Act! Deployment on individual users' desktops when each uses a local database

Deploying Act! Premium with a Shared Database

For organizations that want to support a team of users and maintain data and database control, you can deploy Act! Premium to each user's PC and provide network access to a centrally shared database. This approach provides complete sharing with greater administrative 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 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. The Act! Internet Sync Server can be deployed if users need to sync data across the Internet without a Virtual Private Network (VPN)--for example, when working from home.

Act! Premium allows deployment of multiple Network Sync Servers and Internet Sync Servers, so traffic can be load-balanced. These Sync Servers can be deployed on any machine on the network to optimize deployment flexibility and reduce costs.

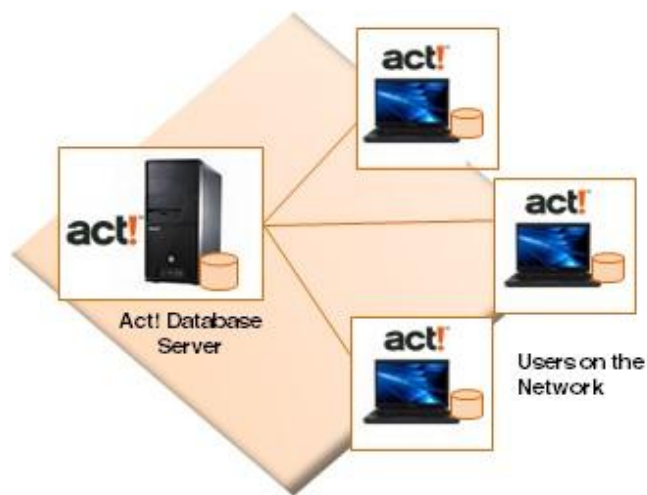


Figure 8: Act! Premium Deployment with a Shared Database

Deploying Act! Premium (access via 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! and the database are installed on centrally managed servers. Users connect to the database via a supported browser 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 or Google integration with Act! install a plug-in from the Preferences dialog box.

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

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.

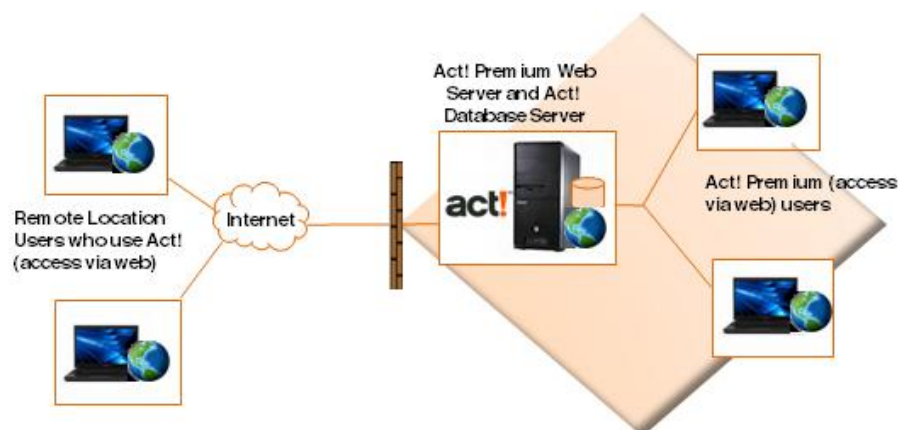


Figure 9: Act! Premium (access via web) using a single server

A second option is to deploy the Act! database and Act! Premium (access via web) on separate servers. This provides increased performance and security. Multiple application servers running Act! can be used to extend scalability with all of the servers connecting to a common database server. With this deployment:

- Microsoft SQL Server is installed and configured on a dedicated server.
- Act! Premium (access via web) is installed on one or more application servers to accommodate the necessary number of users.

The benefit of the Act! Premium (access via 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 (access via web), database administration and control are completely in the hands of experienced and authorized personnel. Users simply connect to the database using their browser.

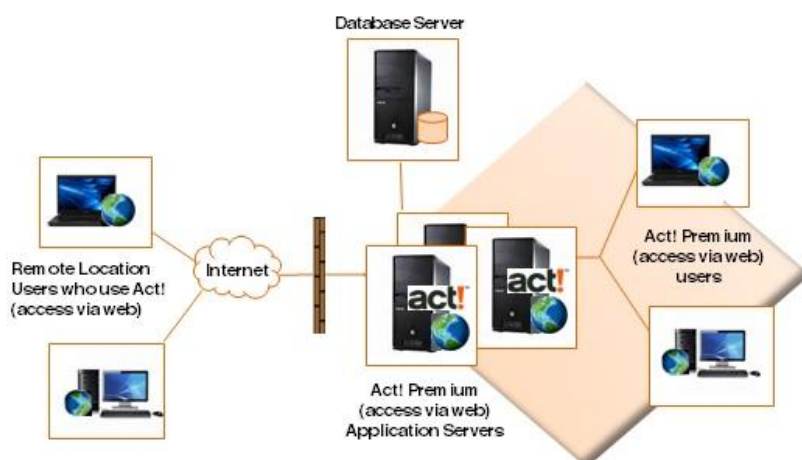


Figure 10: Act! Premium (access via web) multi-server deployment

Mixed Deployments

To support a varying set of user needs (including connected, disconnected, and offline access) and maintain maximum flexibility, organizations can deploy Act! in a mixed desktop and web environment. Mixed scenarios provide instant anywhere, anytime access through Act! Premium (access via web), while allowing disconnected/offline access using Act! Premium for users who need this functionality. Furthermore, in a mixed deployment, both Act! Premium desktop and web users share a common database and customizations to layouts, reports, and fields. It enables IT to administer and customize one environment and allows users to choose their access method.

Act! delivers flexibility using a single license per user that enables access from a desktop and the web. This allows an organization the flexibility to support access methods based on varying business and user needs. A mixed environment allows Act! desktop and 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 main database.

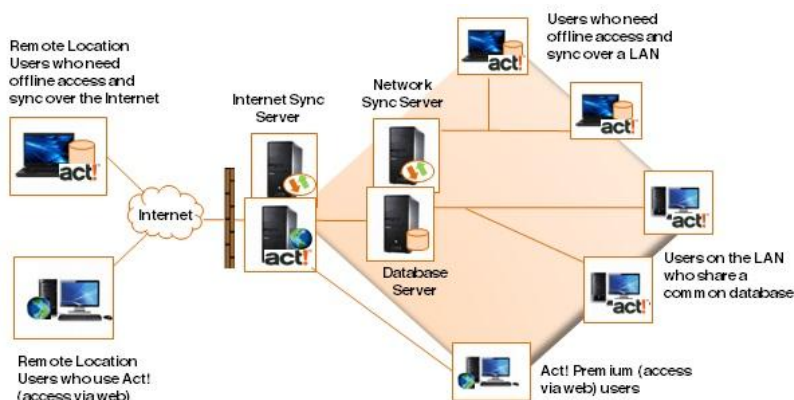


Figure 11: Act! Premium / Act! Premium (access via web) mixed deployment

Silent Install³

Administrators can set up Act! Premium to install on client machines without user intervention. When the Administrator installs Act!, a command line records the installation information as pre-recorded answer files so that it can be used for subsequent installations on other machines. This includes setting key preferences and serial number activation. The Administrator can also modify the error message that users will see if a problem occurs with the install.

³ Delivered as an MSI package. Software to distribute an MSI package is not included. Silent activation on client machines requires internet access. Users must be machine administrators to activate. See the Act! Help for details.

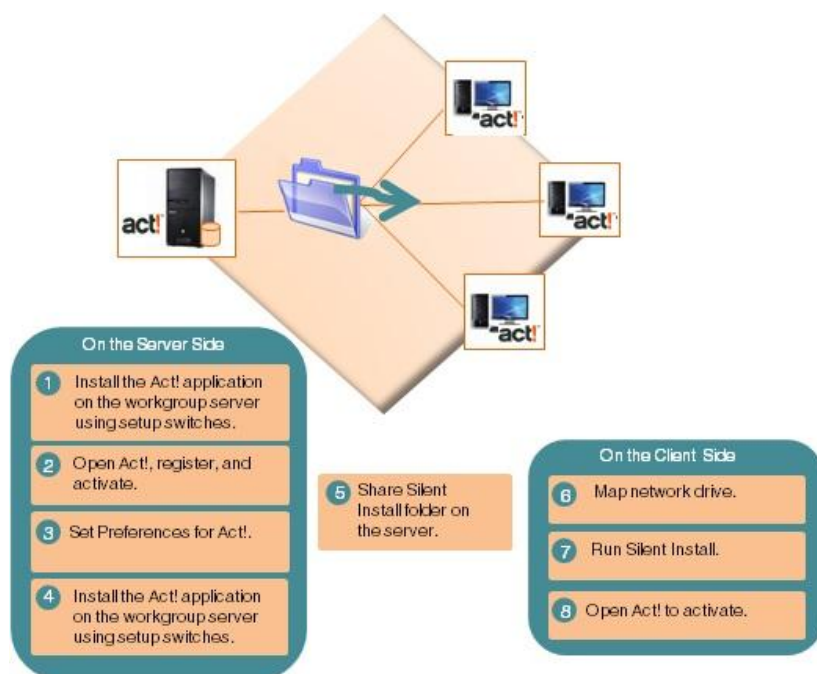


Figure 12: Act! Silent Install

Auto Update

Act! Update enables automatic notification and optional downloading of the latest product updates. Customers are notified of an update and can choose to download and install it. This technology uses Web Services via the HTTP protocol, and as such, is safe through normal firewall settings.

Some IT administrators prefer to control the update process in their environment. These administrators can disable the Act! Update feature.

Conclusion

Varied integration choices and deployment options enable you to securely deliver Act! in your organization with the optimal blend of features and flexibility. Selecting your own deployment strategy and choosing whether to integrate with the “out-of-the-box” components or develop your own integration strategy gives your organization full control and flexibility in the way you use Act!.



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