Sage ACT! | White Paper

Microsoft® Office Integration

Achieve Greater Efficiencies When Using Both Sage ACT! and Office Tools in Daily Business Operations

Table of Contents

Introduction

Sage ACT! helps organize all the details of your customer relationships in one place for a complete view of the people you do business with. This centralized contact data helps individuals or teams find contact information and coordinate schedules quickly and easily. In addition, users can integrate Sage ACT! with Microsoft® Office applications, such as Microsoft Outlook®, Microsoft Word, and Microsoft Excel®, to further leverage their contact data.

Sage ACT! integration with Office applications creates a technology environment enabling businesses to achieve greater efficiencies in using both Sage ACT! and Office tools in daily business operations.

The purpose of this white paper is to provide an overview of Sage ACT! 2011 integration with the above core Office applications. It explores how Sage ACT! users can leverage the capabilities of Sage ACT! integration with Office and assumes the reader has a basic understanding of each Office application. The Integration capabilities addressed in this paper pertain to the 2011 versions of Sage ACT! Pro and Sage ACT! Premium (access via Windows® and web).

Note: Sage ACT! Premium (access via web) may have limited availability as a standalone product. Please check with your local region for availability.

Integration with Sage ACT! and Office Applications Overview

Outlook

Sage ACT! integration with Outlook enables multiple functions to occur between Sage ACT! and Outlook. Primarily among them:

- Outlook email messages can be saved automatically as Sage ACT! histories
- Outlook emails can be addressed using Sage ACT! databases as an address book
- Outlook rules and alerts can utilize Sage ACT! contact information
- Sage ACT! contact records can be synchronized with Outlook
- Sage ACT! calendar items can be synchronized Outlook
- Sage ACT! appointments can be sent in iCalendar format so that Outlook users can view it as an Outlook calendar appointment.

Word

Sage ACT! integration with Word allows users to create letters, memos, fax cover pages, and custom templates for documents. From within Word, you can attach any document directly to a Sage ACT! contact for reference later. Sage ACT! also allows mail merge Word integration in order to create documents and letters.

Excel

From most list views in Sage ACT!, users can export data directly into Excel although special security permissions may be required. Please refer to the Security Model white paper for more information about security restrictions. Users can also embed Sage ACT! fields in Excel spreadsheets and add them to a contact, group, or company documents tab[1]. From within Excel, you can attach any spreadsheet directly to a Sage ACT! contact.

Sage ACT! 2011 Supports Microsoft Office 2003, Microsoft Office 2007, and 32 bit editions of Office 2010.

Check www.act.com for compatibility for your specific version of Sage ACT!.

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

Sage ACT! Integration with Microsoft Outlook

Outlook Integration Overview

Outlook is the de facto email application in many organizations and offers basic calendaring functionality and contact information to users. Sage ACT! has robust time management and calendaring capabilities as well as extensible contact management features. Sage ACT! integration capabilities with Outlook are targeted towards allowing users to manage basic calendar items and contact details in either application while still enjoying the full calendar functionality and contact management features in Sage ACT!.

Sage ACT! and Microsoft Outlook Email

Sending Emails from Outlook

When properly configured, any emails sent from Outlook that match a contact email address are recorded in Sage ACT! as line items on the history tab of the contact. This establishes a historical record that can then appear on reports within Sage ACT! such as the Contact report and the notes and history report. Having this record ensures that everyone with visibility to the contact record is aware of this interaction.

Attaching Emails received in Outlook to Sage ACT!

There are several methods for capturing emails from Outlook and attaching emails to Sage ACT! contact records. Attaching emails to Sage ACT! helps provide a consolidated view of interactions with contacts across multiple interactions mediums (meetings, phone conversations, emails, etc…).

Users can choose to manually attach emails as Sage ACT! history records by selecting or opening a message and clicking the attach to Sage ACT! contact button on the Outlook toolbar. This method provides the most flexibility as the user can choose which database and which contact(s) to attach the email to, regardless of the content in the To: and CC: fields of the email. If the contact's email address can be found, it will select that contact by default but you can modify this.
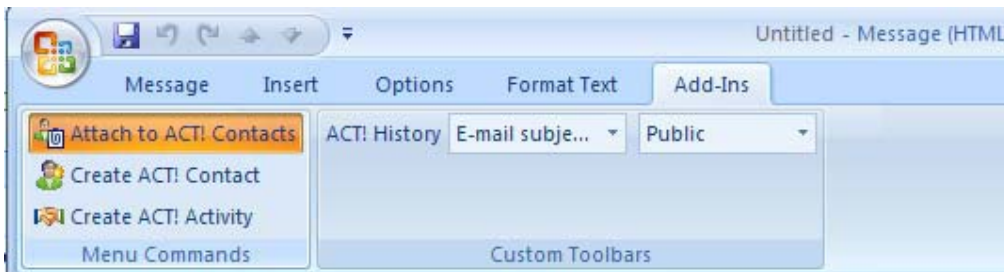

Figure 1: Attaching emails to contact records provides a consolidated view of interactions with contacts across multiple mediums.

Attach to Sage ACT! contacts can be configured to auto create a new Sage ACT! contact based on the sender of an email if a matching contact record cannot be found in Sage ACT!.

The second method, called quick attach, allows users to select a batch of emails from different senders and record history in Sage ACT! "en masse." Using this method, the user selects the quick attach function:

Figure 2: Quick attach allows users to select a batch of emails and record history "en masse."

When clicked, email histories are added to the contacts defined in the quick attach preferences. The messages will be queued up and processed by a background process so the user can continue using Outlook normally. A progress dialog will appear in the Windows task tray to provide a summary of attached messages as well as any errors (messages that could not be attached). The quick attach function also allows a setting to create contacts automatically if they are not already in Sage ACT! default preferences for the manual and quick attach methods are set using setup assistant.

The third method for attaching emails from Outlook to Sage ACT! allows an Outlook user to define a rule using Outlooks rules feature with an action of attaching an email to Sage ACT!. The rule criteria uses Outlook's rules features capabilities and can be used in conjunction with other Outlook rules e.g. record an email meeting criteria to Sage ACT! and move to Outlook folder.

Sage ACT! and Microsoft Outlook Calendar

Synchronizing Sage ACT! and Outlook Calendars
New to Sage ACT! 2011 is the ability to synchronize Sage ACT! and Outlook calendars. This feature allows users to select Activity types from Sage ACT! to synchronize with Outlook. When configured, users can create, change or remove calendar items from either Sage ACT! or Outlook and synchronization will automatically update calendars in both applications.

Note: Outlook has limited ability to identify calendar item types, so in some situations a Sage ACT! activity type may be displayed in Outlook calendar as an appointment or meeting rather than the activity type specified in Sage ACT!. Sage ACT! will maintain the correct activity type regardless of what is displayed in Outlook. Outlook Tasks are unavailable for synchronization.

The synchronization feature can be scheduled to run as a background process at the frequency desired by the user. While synchronizing both Sage ACT! and Outlook can be accessed as normal. Neither Sage ACT! nor Outlook need be open for a scheduled synchronization to occur.

Sending Invitations Using iCalendar
Users who work in environments with non-Sage ACT! users will find this feature especially useful. This feature allows you to use your Sage ACT! calendar as your primary tool for scheduling while sending calendar invitations in a standard format that most other calendar programs recognize called iCalendar. This format will not only work with Outlook, but also Lotus Notes®, Google Calendar™, Apple® iCal® and most other standard electronic calendar formats.

Quick attach remembers what emails were previously processed to avoid duplicate history creation in Sage ACT!.

You can synchronize custom activity types you create in Sage ACT! with Outlook (though they may appear in Outlook's calendar as appointments).

No setup is required to use this feature. The only thing that is required is to have a contact with an email addressed attached to it. When scheduling the meeting with the contact, check the box on the schedule activity dialog that says "Send activity email to contacts" directly below the contact(s) with whom you are scheduling the meeting. An iCalendar object will be formed based on the information you have added to the calendar invitation and it will be sent to the contacts you have specified. This feature can be used in conjunction with the calendar synchronization feature.

Sage ACT! and Microsoft Outlook Contacts

Importing Contacts to Sage ACT! from Outlook

Using the import wizard in Sage ACT!, users can import Outlook contacts and activities into Sage ACT!. When using the import wizard, users can choose to import either Outlook or Exchange contacts. Existing appointments and tasks will be imported as Sage ACT! activities. Notes in Outlook will be imported as Sage ACT! notes. Journal entries will also be imported as Sage ACT! notes.

Synchronizing Sage ACT! and Outlook

New to Sage ACT! 2011 is the ability to synchronize Sage ACT! and Outlook contacts. This feature allows the option of automatically importing into Sage ACT! any contact added to Outlook's default contact folder. Contacts imported in this manner will attempt to match to existing Sage ACT! contacts via email matching to avoid duplicate contact entries. A subset of Sage ACT! contacts can be selected to allow for synchronization to Outlook. An Administrator or manager user of Sage ACT! can create and control the availability of different Sage ACT! contact synchronization sets to Sage ACT! users. This allows for administrative control of contact records available for synchronization with Outlook.

When synchronizing with Outlook contacts 3rd party synchronization tools may cause duplicate contact record creation. It is recommended that you do not use 3rd party contact synchronization tools between Sage ACT! and Outlook while using this feature.

When configured, users can create and change contacts from either Sage ACT! or Outlook and synchronization will automatically update contacts in both applications. As a security measure, in the event a contact is deleted from Outlook the synchronization feature does not delete the contact from Sage ACT!.

The synchronization feature can be scheduled to run as a background process at the frequency desired by the user. While synchronizing both Sage ACT! and Outlook can be accessed as normal. Neither Sage ACT! nor Outlook need be open for a scheduled synchronization to occur.

Note: For convenience contact and calendar synchronization features use the same user defined schedule, however users are able to choose either contact or calendar synchronization (or both), the features are enabled/disabled separately per user configuration.

Sage ACT! and Microsoft Outlook Integration Examples

Receiving vCard Files in Outlook

Some contacts include their contact information in vCard format (.vcf file) in emails. By opening a .vcf file in Outlook you have the option of saving that information as a contact in Outlook. With Sage ACT! Outlook contact synchronization, adding that contact to Outlook will automatically create a corresponding contact in Sage ACT! and keep in sync updates made to that contact in either system.

Mixed Sage ACT! / Microsoft Outlook MS Exchange Work Environment

In some organizations Microsoft Exchange and Microsoft Outlook are used to manage employee calendars. Employees using Sage ACT! in these organizations can continue to use Sage ACT! calendars to manage time. Using Sage ACT! and Outlook calendar synchronization a user may select to synchronize only Sage ACT! activity types that block availability in their Outlook calendar (e.g. Meetings, Appointments, and Vacations). This allows other employees in the organization to request time from Outlook that may be allocated in Sage ACT! to activities with more fluid time constraints.

Gmail via Outlook and Sage ACT! Integration

Outlook can be configured to be the mail client for many different public mail accounts including Google's Gmail. Once users setup Outlook to use Gmail, users can enjoy Outlook integration with Sage ACT! as previously described, though additional Google components may be necessary to integrate Outlook and other Google application features (e.g. contacts sync) .

Sage ACT! Integration with Microsoft Word

Word Integration Overview

Microsoft Word is very popular for document creation and editing. While Sage ACT! has built in word processing capabilities, Sage ACT! Office integration allows users to use Word to create documents from within Sage ACT!. Creating documents directly from Sage ACT! allows users to have contextual awareness of contact information as well as access to historical interactions as a reference while creating these documents.

Using Word, documents can also be attached to Sage ACT! to associate documents with contacts. Word documents can be dragged and dropped on the documents tab of a contact record in Sage ACT!, or can be attached via an Attach to Sage ACT! menu item added to Word.

Menu locations for this feature in Sage ACT! differ in different versions of Word due to features changes in Microsoft Office.

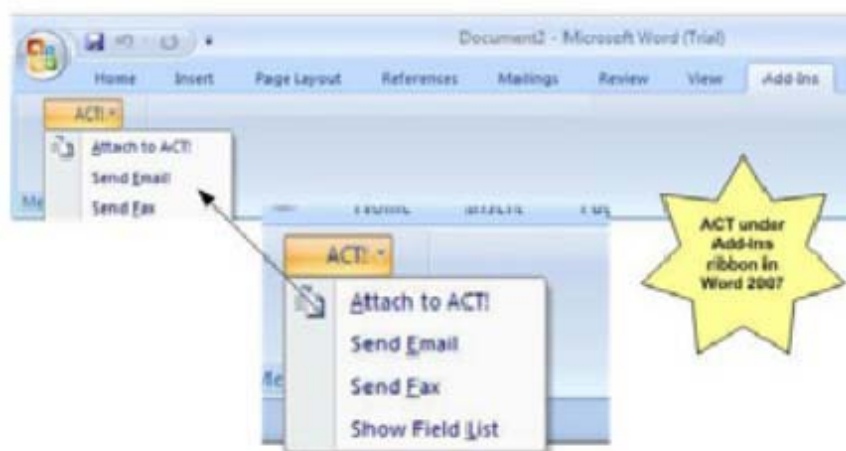*Figure 3: This is how the Sage ACT! menu appears in Word versions prior to 2007.*

Figure 4: This shows the Sage ACT! Menu behavior in Word 2007 and Word 2010 (32 bit edition).

For frequently used content, users can create a template to make document creation easier. When documents are created for a contact using one of these saved templates, it is recorded as history item for that contact. This provides a complete history of all interactions with each client.   A template can include standard contact information, but also other data associated with contacts, like product detail and last meeting held. In fact, data in any Sage ACT! field can be incorporated into Word templates. By creating standard templates with embedded data, and making them available to users, organizations can more easily enforce standard contact communication processes.

Sage ACT! Integration with Microsoft Excel

Excel Integration Overview

Sage ACT! has an excellent integration with Excel that enables a user to export data from any contact, company, group, opportunity or task list in Sage ACT! to Excel, with just one click. The columns in an Excel spreadsheet will match the columns (or fields) shown in the Sage ACT! list. When exporting data from the opportunity list view in Sage ACT! a pivot table and a pivot chart is included in the export to provide data summary and information visualization.

Sage ACT! data is also available for mapping into Excel spreadsheets, by linking fields in this manner updates to data items in Sage ACT! can be automatically refreshed in Excel.

Like Word any Excel document can also be attached to a contact record in Sage ACT! by simply dragging and dropping the document to the documents tab of a contact record in Sage ACT! or via an attach to Sage ACT! menu item added to Excel.

Mapping Sage ACT! Fields into Excel

Users can link cells in an Excel spreadsheet to fields in Sage ACT! by first adding the spreadsheet to the Sage ACT! Documents tab[2]. Users can maps cells in the Excel spreadsheet to Sage ACT! Contact, Group, or Company fields. This uses the object linking and embedding (OLE) integration of Excel and Sage ACT!. If data in a field in Sage ACT! changes, the Excel file will be updated automatically when the spreadsheet is opened.

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

This spreadsheet can be of any length and integrated with any number of Sage ACT! fields. The advantage of this integration is that whenever a field changes in Sage ACT!, the data in the Excel spreadsheets refreshes with one click.

Pivot Tables and Pivot Chart in Excel with Sage ACT! Opportunities Export

When exporting data from the opportunity list, Sage ACT! creates two additional spreadsheets within the workbook. One spreadsheet is a pivot table, and the other is a pivot chart. These pivot tables allow for drilling down into the data exported from Sage ACT!.

What is a pivot table?

A pivot table creates a summary of data from many records, which can easily be manipulated and sorted based on different criteria. Pivot tables are an excellent tool for dissecting information. Pivot table reports are interactive tables that let you work with information so you can see how the data fits together. By comparing data, users can identify patterns, trends, and relationships. Simple clicks are all that is required to move or "pivot" the rows and columns of data from one view to another. Pivot tables let users organize and summarize data in a hurry. In addition, users can drag the buttons to a new position to quickly rearrange the data. Pivot tables can be used to analyze sales opportunities recorded in Sage ACT!.

Pivot tables and Pivot charts are features in Excel. Sage ACT! exports from opportunity list views to Excel which automatically creates these items on export.

Figure 5: Opportunity pivot tables can be used to analyze sales opportunities recorded in Sage ACT!

Pivot Charts

The same data that is created in a pivot table can be used to create pivot charts. Using simple keystrokes, users can produce excellent charts for presentations and reports. The following Figure shows a 3D pie chart of opportunities by record manager from Sage ACT!.
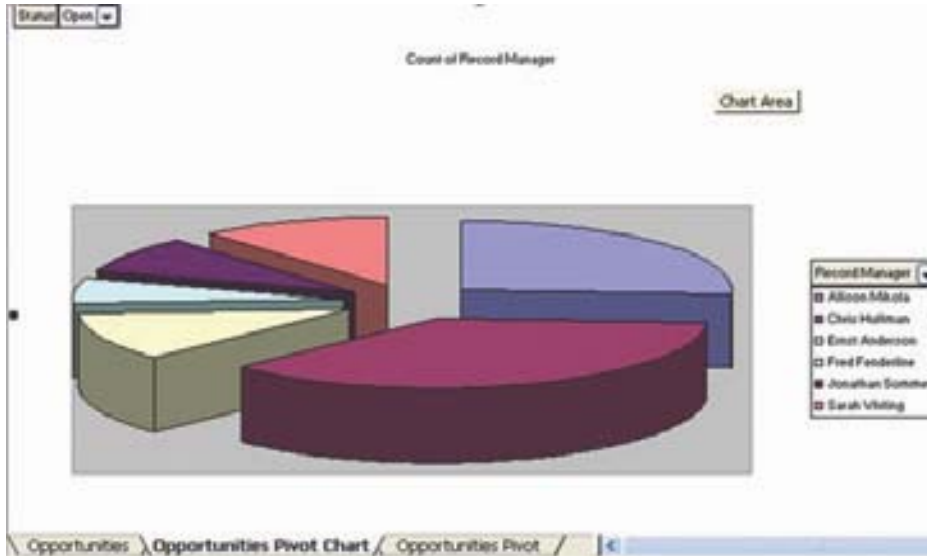

Figure 6: Opportunities pivot charts can be created easily for use in presentations and reports.

Importing Data into Sage ACT! from Excel

Sage ACT! allows data import from a variety of sources including Excel files. New to Sage ACT! 2011, when importing to Sage ACT! from Excel files you are able to map columns from Excel to fields you want created in Sage ACT!. In this manner you can create new Sage ACT! fields "on the fly" during your import to capture your data in Sage ACT!.

Note: All newly created fields in Sage ACT! are created using character data type. Users should make sure their data is accurate and properly formatted prior to import—data may need manipulation to correct problem areas prior to import.

Conclusion

Working "smarter not harder" achieves a lot more than just saving time. Increased efficiency means increased productivity. Leveraging Sage ACT! integration with Microsoft Office applications not only ensures that users and managers can keep all the interactions with their prospects and customers in one place, but enables them to do it efficiently and effectively. Whether scheduling meetings and to-dos, generating letters and emails, attaching web pages to a contact record, or analyzing opportunities, users can spend more time focusing on advancing their business and less time on administrative tasks.

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About Sage ACT!
Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place.

Important Note: Review Sage ACT! system requirements at www.act.com/2011systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. **Compatibility:** Visit www.actsolutions.com or contact your add-on product provider to help determine compatibility.