Sage ACT! | White Paper

Keys to a Successful Deployment

Configure Sage ACT! to Best Fit Your Organization's Needs

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Introduction

Sage ACT! enables an organization to configure a contact and customer management solution based on the organization's needs, whether users require online, offline, or a combination of access methods.

The key to a successful Sage 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 Sage ACT!.

Choosing your Deployment Model

The first stage in installing Sage ACT! is deciding what method of access you will be using. Sage ACT! Pro allows you to setup single user databases and share them over the local network in real time, install on a Terminal Server for remote access, or setup synchronization for disconnected remote use. In addition, Sage ACT! Premium also offers you the ability to view your data over the internet using Internet Explorer® or Firefox®.

The simplest method of accessing your data is an unshared local database. This process is guided using the Getting Started Wizard that you'll see on the first time you launch the application. This will create a database for a single user on your computer.

For more complicated multi user or multi computer deployments, we need to discuss what options are available and how they can be used most efficiently.

Local Area Network Sharing - In this model you will install Sage ACT! on a database server, setup your shared database and provide end users a shortcut to the database. Each end user will need to install Sage ACT! on their computer. Benefits to this model are it is simple and secure and it provides real time access to the data.
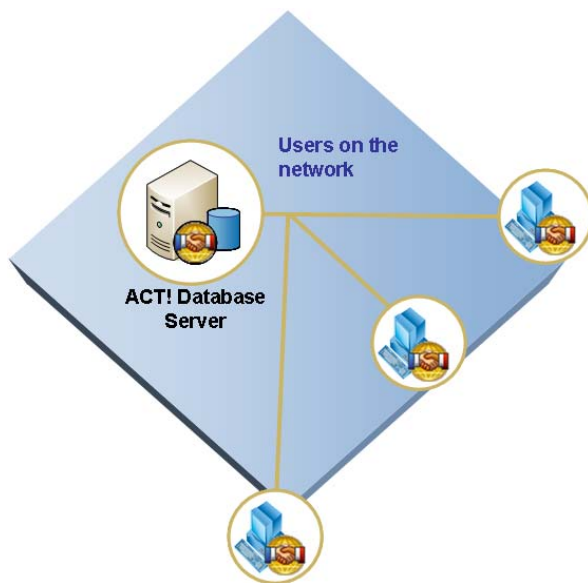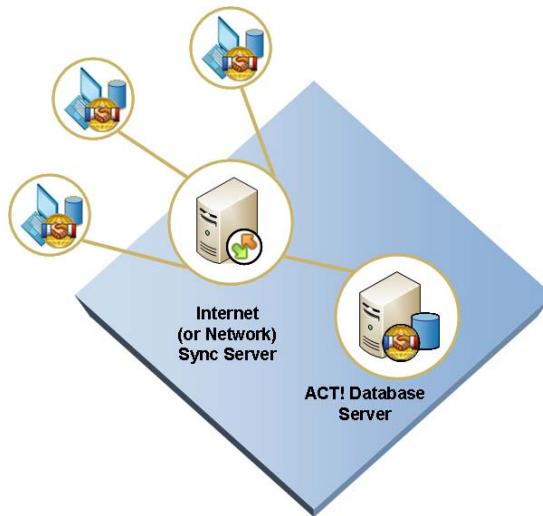
The first stage in installing Sage ACT! is deciding what method of access you will be using.

Figure 1: In this diagram you can see several networked clients accessing a shared database

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Synchronization - This model gives you a disconnected access to the data if you have a remote office or laptop that needs to access the data. You will setup the database on a host or publisher machine and create a remote database for any number of remote machines. On the publisher you run Sage ACT! Pro with application sync or Sage ACT! Premium with synchronization services. This can be the same as your database server or can be separated to another machine for additional security and/or performance. On the remote computer when able to connect to the publisher, initiate a sync and all changes will be transferred in both directions. Benefits to this model are access to the data when you are not connected to the network.

The synchronization model gives you access to the data if you have a remote user.

Figure 2: In this diagram you can see several remote databases syncing to a shared database. The internet or network sync service can be run on the database server or it's own machine

Terminal Services – This model takes advantage of Windows Server® technology and allows you to publish an installation on the server to be accessed by end users via remote desktop or Citrix®. In this deployment scenario, you would install Sage ACT! and any other shared applications on the server and provide end users with access to remote in. Benefits to this model are less client installs and a single location to install updates or make configuration changes.

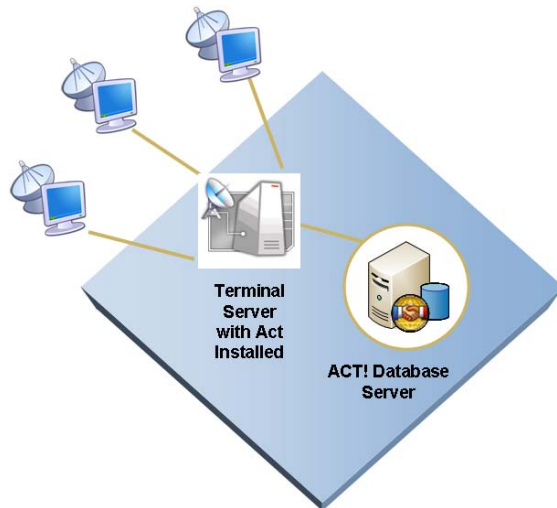Keys to a Successful Deployment

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Figure 3: In this diagram you can see several clients connecting to a shared database via Terminal Services. Notice that the remote clients do not have Sage ACT! installed. You can host the database on the Terminal Server or a separate machine

Web Access – Sage ACT! Premium also offers access to your data directly over the internet using Windows Server technology. You can access this from any machine that has Internet Explorer or Firefox installed. To set this up, you need to enable the Microsoft® web server (IIS) service and install Sage ACT! Premium (access via web) on the host machine and send a web site link to any end user you want to access the database. Benefits to this model include low costs of deployment and maintenance and wide range of supported client machines.
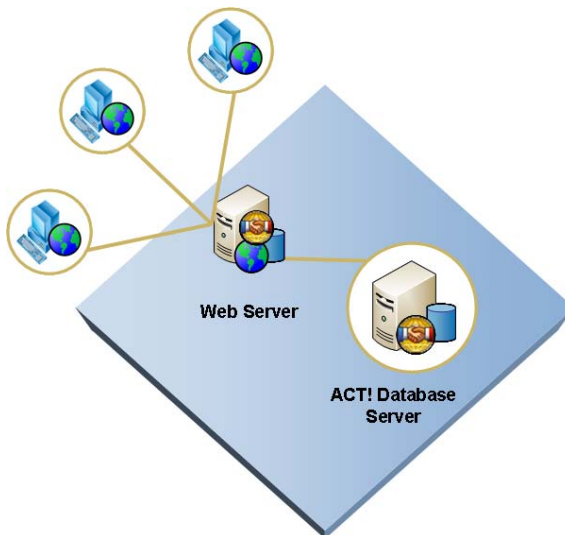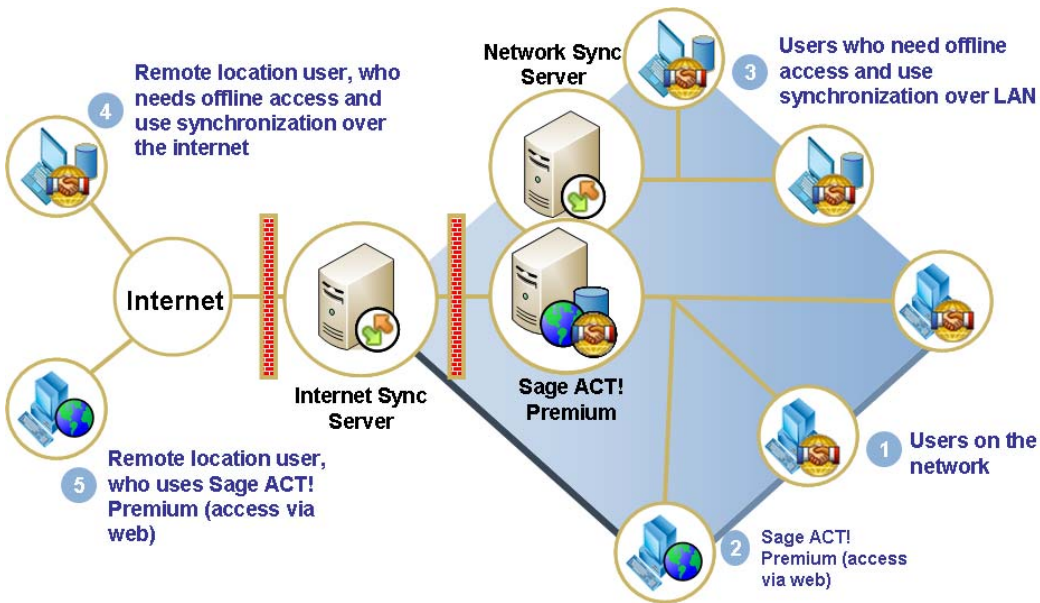

Figure 4: In this diagram clients are accessing Sage ACT! Premium (access via web)

A successful deployment may consist of several of these models. For example, you can setup synchronization and publish a remote database using Sage ACT! Premium (access via web). This will give a remote office access to the database while only installing Sage ACT! on one machine. Or you could install Sage ACT! Premium (access via web) on your synchronization server for an additional method of access.

Ensure your machines meet the minimum requirements before you install Sage ACT!.

Figure 5: This is a complicated deployment combining several types of access. If you have any questions regarding which deployment model would best suit your needs please contact our Sales or Technical Support teams and we'll be sure to put you on the right track. Before you start is the best time to plan your deployment

Prerequisites

Now that you've decided which method you would like to use, the next step is ensuring your machines meet the minimum requirements. Minimum requirements can be found online at http://www.act.com/2011/system/.

Sage ACT! installs several Microsoft components. As a best practice, we recommend that you apply all Windows® Updates on each machine before installing Sage ACT!. Many Windows updates require a reboot. Make sure any pending reboot has been performed before starting.

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Conclusion

In order to ensure you set up a contact and customer management solution based on your organization's needs, it is important to consider the various options discussed in this paper. First determine whether users require online, offline, or a combination of access methods before choosing your deployment model

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