Act! workspace
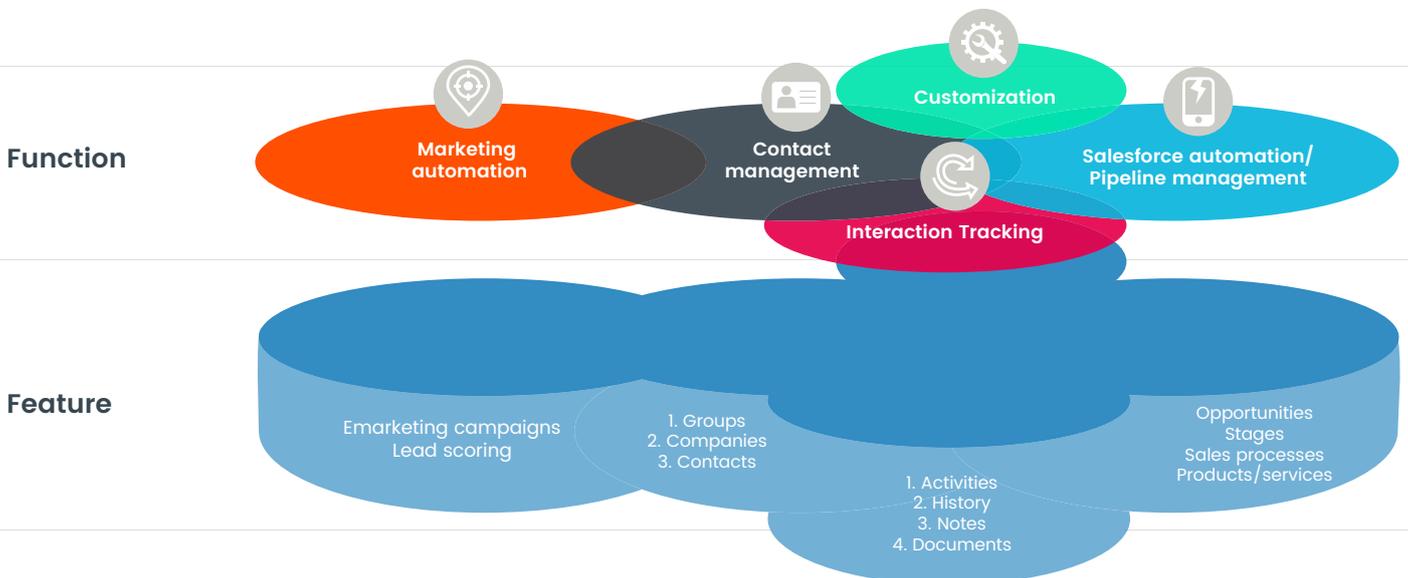
Creating an adaptable, everywhere, connected experience

Introduction

Customers are at the heart of any business and managing them is at the core of any customer relationship management (CRM) solution: keeping rich, organized contact details, tracking and prioritizing activities, driving demand, and managing sales opportunities. CRM solutions like Act! help businesses convert customers and improve customer retention to increase revenue, while decreasing sales and marketing costs.

Act! is designed and optimized for entrepreneurs, sales teams, and small and mid-sized businesses (SMBs), making it easy to use. It's also easy to tailor an Act! experience to fit unique business and industry needs, supporting both business-to-business (B2B) and business-to-consumer (B2C) environments.

For many businesses, using a single tool to manage customer relationships simplifies business processes, removes complicated integrations, and reduces IT costs. Act! includes powerful sales and marketing automation features, plus connections to hundreds of popular apps, that help businesses drive demand and convert leads to customers.

What follows is a logical data model with main business entities and their relationship in Act!. This key information fuels functionality in Act! and is the blueprint of the data in an efficient business today:

Function	Marketing automation	Contact management	Customization	Interaction Tracking	Salesforce automation/ Pipeline management
Feature	Emarketing campaigns Lead scoring	1. Groups 2. Companies 3. Contacts		1. Activities 2. History 3. Notes 4. Documents	Opportunities Stages Sales processes Products/services
Act! relationship	Create and send professional, mobile-friendly campaigns. Track and convert customers with lead scoring Call Lists.	1. Organize contacts in groups for business process segmentation, including customer acquisition or marketing automation. Group membership can be dynamic based on contact field values. 2. Track and manage the companies that contacts belong to. 3. Keep rich contact details for leads, prospects, and customers. Contacts can also have relationships to other contacts.		1. Schedule meetings and activities, and manage and automate tasks. 2. View a comprehensive feed of all interactions and changes to any information. 3. Track and search relevant unstructured information. 4. Track and search pertinent documents.	Define stages, sales processes, products and services, and track deals throughout the sales pipeline. Add custom fields to records, use custom lists, define behaviors and screens — all driven by metadata.

Make it yours quickly

No two businesses are the same. CRM solutions should be flexible and easily tailored to suit business and industry needs, not the other way around. Act! provides powerful record and screen customizations, so businesses can capture the right information for contacts, opportunities, companies, and groups, plus drive the right processes. And with simplicity in mind, customizations can be easily implemented. If more advanced capabilities like industry-specific capabilities are needed, Act! has a wide market of add-on solutions (http://www.actaddons.com). If custom IT integration is needed, Act! boasts a large channel of highly-trained Act! Certified Consultants[1] experienced in helping customers with integration, plus setup, customization, and training (http://partners.act.com/search).

When planning initial implementation, it's important to understand the types of customizations to consider:

1 In-product configuration. Powerful customizations can be done in Act!, including:

- Custom database fields, lists, and behaviors to support information.
- Custom screens and tabs to optimize flow and productivity.
- Custom activity types, opportunity processes and stages, products and services, and other data to accelerate processes and suit business needs.
- Custom reports and dashboards to provide business insight.

2 Third-party customizations:

- Third-party add-ons for industry-specific or horizontal capabilities to complete a solution.

3 Custom IT integration:

- Easily develop custom functionality or integrations implemented via the Act! API.
- Develop custom user interface or visual elements via SDK for unique solutions and optimal usability.

Short implementation time is a benefit especially fitting for SMBs, along with low operational cost.

❝ When implementing a CRM solution, the amount of time it takes to customize, install, and configure matters. Time spent on implementation is time that otherwise could be spent on what makes your business successful. Compared to other, less nimble CRM solutions, Act! can be up and running very quickly. Even an out-of-the-virtual-box install of Act! can solve many business needs. Rather than spending weeks or months on customization and implementation time, with Act! you're looking at days. One of the best things about Act! is how extremely user-friendly the solution is. From creating new fields to managing users, everything in Act! is built in a way that a non-technical person can navigate their way through. An Act! solution can be as complex, or as simple as you need. Act! has what many other solutions don't, an interface that allows the user to create a robust solution on their own. There is a community of experts here to help, and for a truly custom experience we recommend working with an Act! Certified Consultant[1]." —**Michelle Scott, experienced CRM system consultant, President of 3Leaf CRM**

Your business in concert

Today, many organizations use multiple online tools or apps to run their businesses—business productivity, marketing and social media, eCommerce, back-office and financial, and customer service tools. The number of apps is growing and customers are adopting new apps to solve business needs, often in a self-service manner.
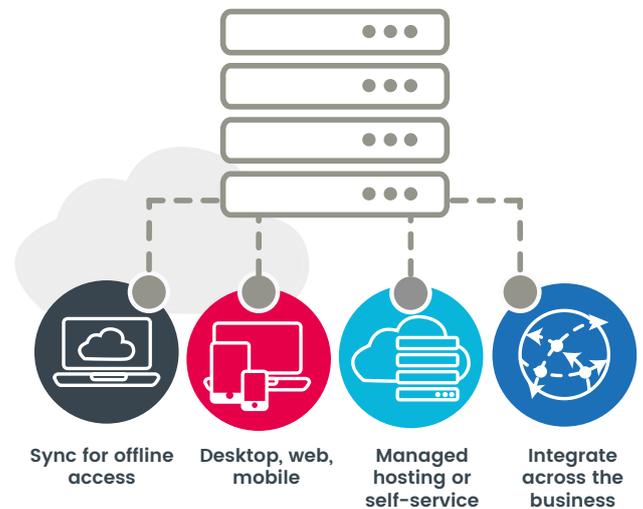
CRM is at the heart, often feeding data to and getting data from other parts of the business. Act! Connect is a hub to seamlessly connect or integrate across the business, keeping the CRM solution the centerpiece of the business, without the need for more complicated and costly infrastructure. Act! Connect is a spring board to apps that automate workflows to and from hundreds of apps, connect and integrate leading eCommerce solutions and social media, and embed an experience right in Microsoft® Outlook® for enhanced productivity. All can be enabled with no additional installation beyond the Act! API.
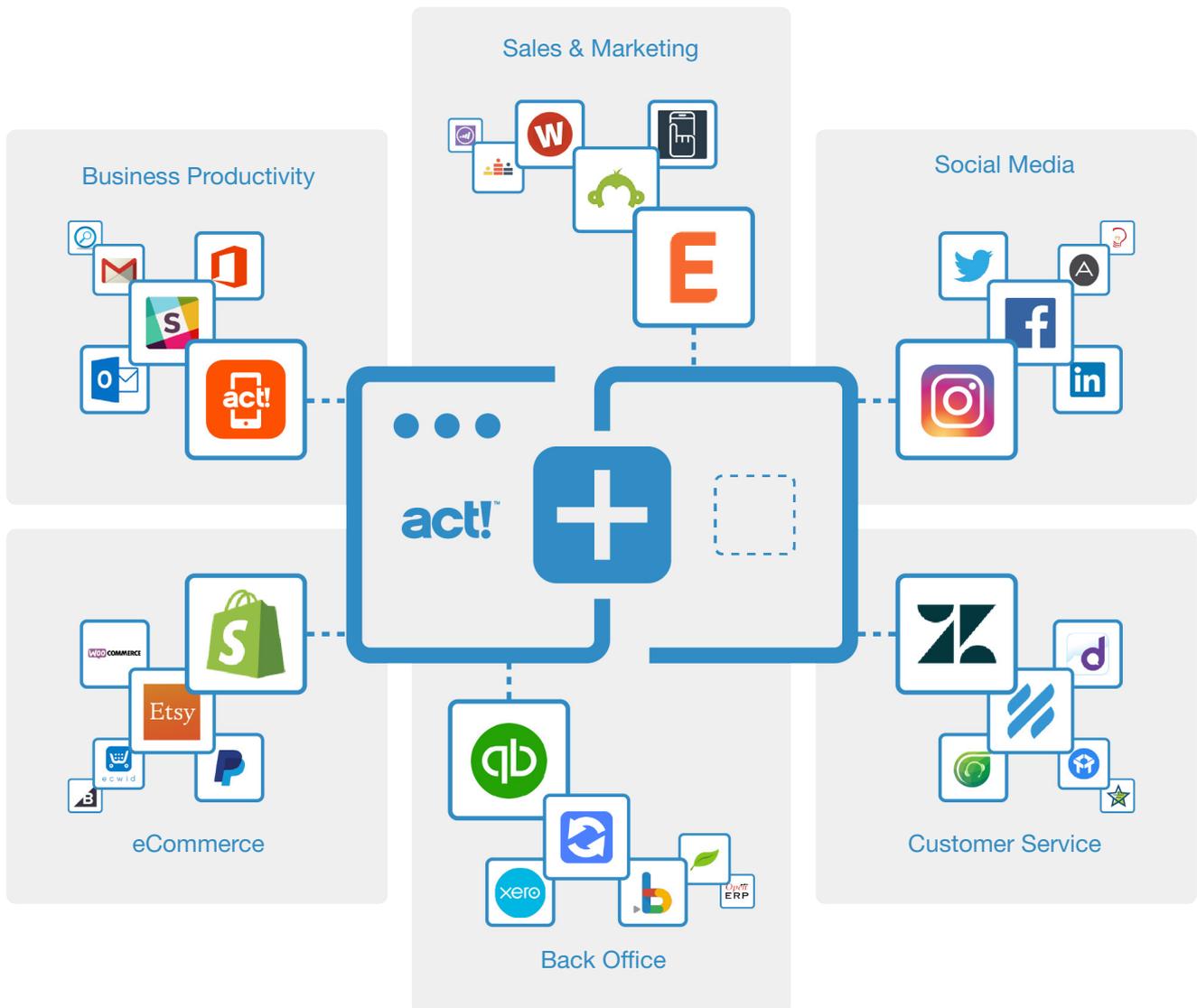
Mobility can be an enabler in a modern business. Act! Companion, a native mobile experience on iPhone®, iPad®, and Android™, pushes mobile notifications for upcoming activities and other pertinent events right to the device and makes it easy to capture interactions on the go.

Works the way you do

Every business has unique IT environments and different levels of IT maturity (some none), and these can change over time as the business grows. Act! is unique in its ability to match and adapt to a business's IT requirements through its flexibility of client access and deployment options. Act! Premium includes a native Windows® experience, a web experience, and a native mobile experience. Act! also supports synchronization of databases, to power offline workforce through a native Windows® experience or support geographically distributed teams who need to roll up information to a centralized database. Act! can be deployed on-premises for convenience or compliance, hosted by Swiftpage, or available in hybrid environments—on-premises and Cloud.

Sync for offline access   **Desktop, web, mobile**   **Managed hosting or self-service**   **Integrate across the business**

Deployment

Fundamentally, Act! consists of a few run-time components, including the application and the Act! API, synchronization and search services, and the underlying database: a Microsoft® SQL Server instance. Each can be distributed individually across servers to scale appropriately or all can be deployed easily onto one PC via simple installation process. Act! also supports a silent install process for larger deployments, where an administrator can set up recorded installation process for subsequent installations on different machines without user intervention.

Local deployment

Act! as a whole can be deployed to a single PC or laptop. Businesses often use this deployment approach to provide Act! as a sales productivity tool with maximum user flexibility, data ownership, and distributed access to information. In this 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. The user also has complete control over Act! application settings and database.

A variation on this approach is to install Act! on end-user machines, but apply corporate-defined customizations (database fields, layouts, add-ons, etc.). In this scenario, the Act! end-user may or may not receive administrative rights to the database, depending on the level of control desired.

Workgroup deployment

In a workgroup deployment, a centralized database serves different front-end Act! client applications or Act! web server(s). In this scenario, the workgroup has shared access to common Act! data, while the business has administrative control over the database and customizations, security (access level, feature level, record level, and field level), and team management (often for the purpose of sales territory alignment). The database service running on a centralized server typically ensures high availability of the Act! data to support the distributed workforce, as well as backup and disaster recovery processes of key Act! data, and centralized corporate integrations to other solutions or tools.

In a larger workgroup or corporate environment, management or IT may choose the flexibility, security, and fast roll-out of a web-based solution. In this scenario, Act! Premium and the database are installed on centrally managed servers where users can connect via a web browser. This method makes setup straightforward, since there is no installation and configuration of software on the end-user's PC or laptop.

Act! in the Cloud

Businesses can elect for managed hosting, where the Act! web experience, and all related services, can be fully managed by Swiftpage using Cloud platform technology. Act! in the Cloud is a popular option for businesses that don't want the burden of IT costs or management.

Synchronization

Users can share data by using a central database and the workgroup can continue to work while disconnected from the network the main database is on, or to enable distributed teams, by using synchronization.

Remote user sync

Synchronization can be utilized to support individuals who have partial connectivity to a centralized database, such as laptop users on-the-go that are part of a larger workgroup. The remote database can contain a subset of the primary database, or all of the data, depending on the needs of remote user.

Remote site sync

Synchronization can be used to optimize distributed sites. A workgroup can share a database that is local to their network and synchronize that database with the main, remote database and network. This is common for geographically dispersed sites, where one or many autonomous workforce and network exists, but the roll-up of data to a central database is desired for cross-business reporting, integration, or other requirements.

Hybrid deployment & sync

Deployment patterns can be combined according to business needs. For example, a business may choose to let Swiftpage manage their web deployment via Act! Premium in the Cloud, but also deploy Act! Premium desktop clients on-premises and synchronize with the Cloud database.

Act! Connect Link

Act! Connect lets external apps, automation, and integrations easily connect with Act!. This is fueled by the Act! API, which is normally hosted on a web server along with Act!. However, often in an Act! Windows® desktop deployment, there is no web server, nor is this easy to administer and secure. Act! Connect Link gives customers a self-service solution and the power of Act! Connect in such an environment. Act! Connect provides a secure URL for any Act! connections and establishes a secured tunnel between those connections, which can communicate with a locally hosted API, without the need for a secured web server.

Act! Connect Link delivers the power of the Act! Connect integration platform to Act! Premium desktop users with no complicated setup—simply install and go.
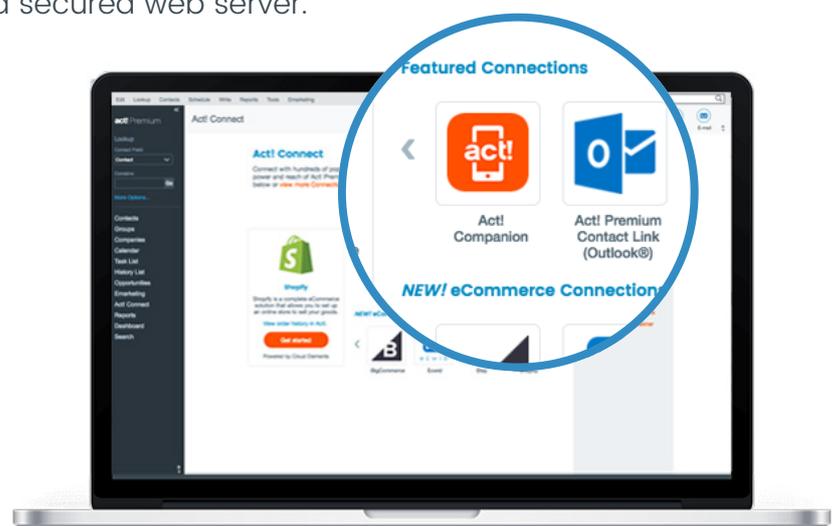
APIs & customizations

Businesses requiring custom development to integrate Act! deeply into the business or to extend Act! for a truly custom solution, will be pleased to know Act! is comprised of industry-standard development technology, used by IT in small businesses and large enterprises alike.

An API standard

The Act! API makes building Act! integrations a seamless experience. Because the Act! API is JSON-based REST API, it's simple and easy to use. Additionally, the Act! API supports open standards, like OData, for powerful querying, and the OpenAPI Specification (Swagger) 2.0, to easily generate code or connect to other platforms, or try the API right in the documentation.

Swagger is an open standard (https://openapis.org/specification), which aims for developers to understand the capabilities of an API by simply looking at its definition. And as an open description, it means it's vendor-neutral, portable, and quickly becoming the defacto standard for all APIs, Cloud providers, and low/no code application platforms.

A unified & advanced development experience

Next to a standard REST API, documentation is the single-most enabling factor for quick adoption and developer productivity. API documentation across the portfolio is accessible through a unified point of entry: http://developer.act.com. API documentation across the portfolio supports Swagger UI, including detailed inline parameters and status codes, samples, and a sandbox for trying the API live inline with the documentation.

SDK

Act! has a history of being built on its own development kit, empowering massive capabilities in customizations and ISV solutions, including a wide range of add-ons (http://www.actaddons.com). The Act! SDK provides the capability to develop plug-ins, which enhance and extend Act! visually and behaviorally. This includes horizontal or vertical customizations and custom controls, which can enhance customizable screens or dashboards in Act!.

Act! Insight

SMBs need key insights to successfully run and grow their businesses. And not just rear-view information, but trending and future-looking information to help guide the business. Act! Insight provides just that, right in Act! across web, desktop, and mobile clients. Key insights include business health metrics, marketing and sales effectiveness, while sales insights include forecasts. All of these have contextual filtering and personalization. For advanced insights, custom insights can be created with custom queries. Traditional dashboards and reports are also housed in Act! to provide a comprehensive view of information, including an advanced report designer and customizable dashboards.

While Act! has advanced in-product insight and reporting, some organizations use external reporting tools and applications as a standard or need external BI or mash-up reporting capabilities. The Act! Object Linking & Embedding Database (OLE DB) Provider can be used to generate custom reports with third-party reporting tools. And unlike direct database connectivity, which is also possible, the Act! OLE DB Provider gives access to logical views of data with friendly terminology, as well as incorporating Act! Security, eliminating the necessity to deal with physical database complexity.

act!

Join over six million users in 100+ countries to create your adaptable, everywhere, and connected workspace today.

About Act!

Act! makes it easy to build relationships that last with quick, organized access to highly personalized customer details. Because every business runs differently, you have the freedom to tailor an Act! experience to your business and industry needs—your adaptable, everywhere, connected workspace. Finally, a flexible CRM solution that's uniquely yours.

Call **866-873-2006**
Visit **act.com**
Contact your Act! Certified Consultant[1]

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