

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.

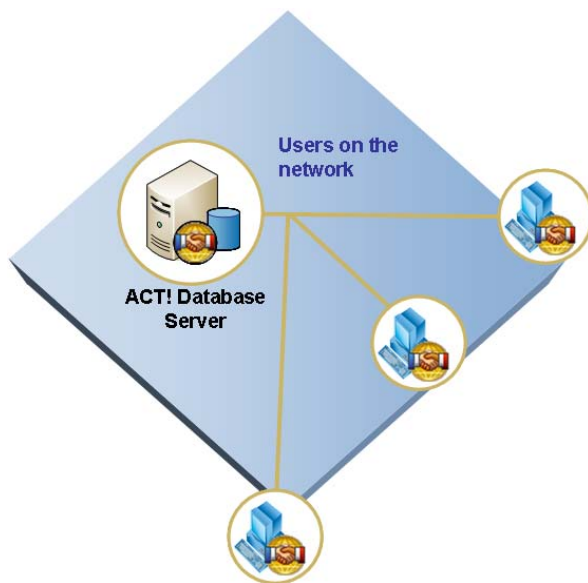


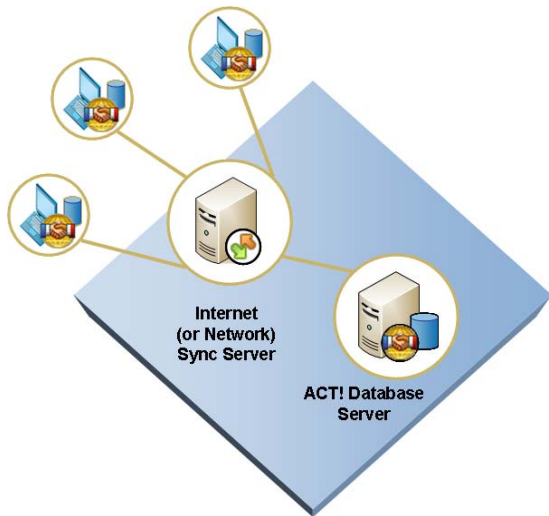
Figure 1: In this diagram you can see several networked clients accessing a shared database

*The first stage in installing Sage ACT! is deciding what method of access you will be using.*

## Sage ACT!

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

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.



*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.

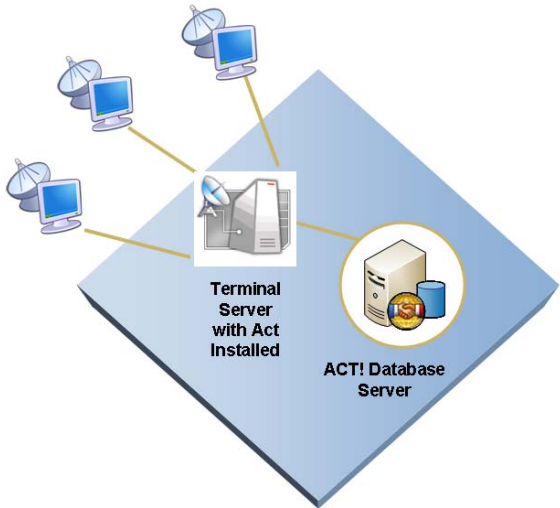


Figure 3: In this diagram you can see several clients connecting to a shared database via Terminal Services. Notice that the remote clients do not have Sage ACT! installed. You can host the database on the Terminal Server or a separate machine

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.

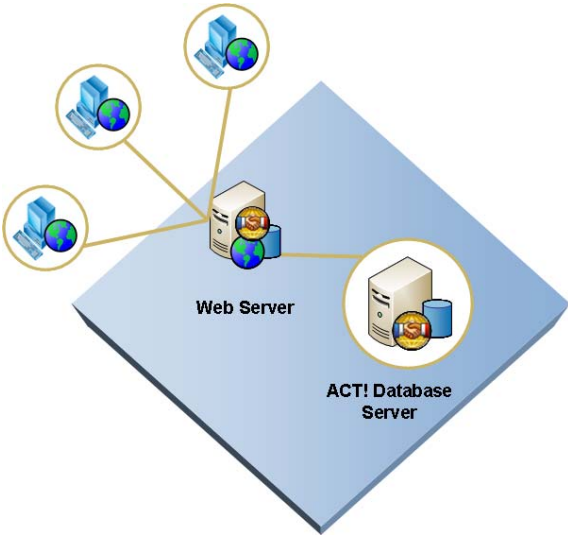
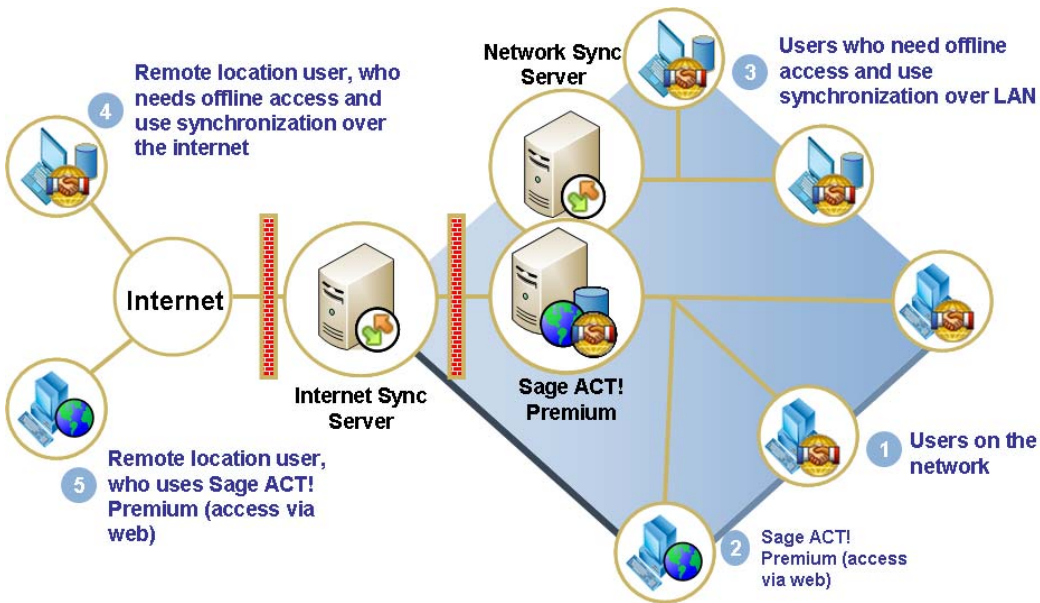


Figure 4: In this diagram clients are accessing Sage ACT! Premium (access via web)

## Sage ACT!

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

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.



*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.

### Start the Install

For the majority of installs, you will be using the Typical Install option. If you want to change default location and whether SQL Server® is installed, you can do this through the Custom Install dialog. Additional resources on installing Sage ACT! can be found here:

#### How to Install Sage ACT! Pro 2011

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=26728](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26728)

## How to Install Sage ACT! Premium 2011

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=26729](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26729)

## How to Install Sage ACT! Premium 2011 (access via web)

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=26730](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26730)

If deploying more than 10 installs, consider using our silent installation technology. This process records an installation and preferences so that you can play it back and install without any user intervention. This is shown to save at least five minutes per machine and can cover post install tasks like activation and default database selection. For more information regarding silent installation, click [here](#).

## How to Perform a Silent Installation of Sage ACT! Premium 2011

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=26837](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26837)

## Post Install Tasks

After the installation has been completed, you can remove any downloaded installation files to recover space. By default, they are extracted to c:\ACT\_Premium\_2011 or c:\ACT\_Pro\_2011. Setup any remaining preferences like email clients, word processors, and menu and toolbar customizations. For sharing a database across the network, make sure you can open the database. For more information regarding sharing a database, see the following KB article.

## How to Share a Database Across the Network

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=13878](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=13878)

For synchronization, you'll need to install any synchronization services and create and restore a remote database. Test to make sure that synchronization is successful once the remote has been restored. See our KB article on [setting up sync](#).

## Synchronization for Sage ACT!

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=14114](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=14114)

For Terminal Services, make sure you can access the installation via remote desktop as the Windows user who installed Sage ACT! and then again as a different Windows user. For more information on Terminal services, see the following KB article.

## Using Sage ACT! With Citrix or Terminal Server

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=15275](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=15275)

For web access, you will want to test the web site both using local host and over the network or internet. Once access has been confirmed, you may want to install client side Outlook® or Word Integration. For more information regarding Sage ACT! Premium (access via web) installations, see our Administrator's Guide.

### **Sage ACT! Premium 2011 Web Administrator's Guide**

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=26795](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=26795)

You may want to move your database or supplemental files from one machine to another in the process of setting up your database. Information regarding moving a database

### **How to Move a Database**

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=19818](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=19818)

Information regarding moving a supplemental file.

### **How to Copy Your Layouts, Templates, Reports, And Queries**

[http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std\\_adp.php?p\\_faqid=14019](http://kb.sagesoftwareonline.com/cgi-bin/sagesoftwareonline.cfg/php/enduser/std_adp.php?p_faqid=14019)

## **Troubleshooting**

Install problems can be difficult to diagnose. In many cases, these are caused when installing Microsoft prerequisites. As always, use the Knowledgebase at <http://kb.sagesoftwareonline.com> or contact our technical support for assistance.

## **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. If you need additional information or assistance with your installation questions, please contact Sage ACT! technical support.

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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](http://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](http://www.actsolutions.com) or contact your add-on product provider to help determine compatibility.



Sage ACT!