

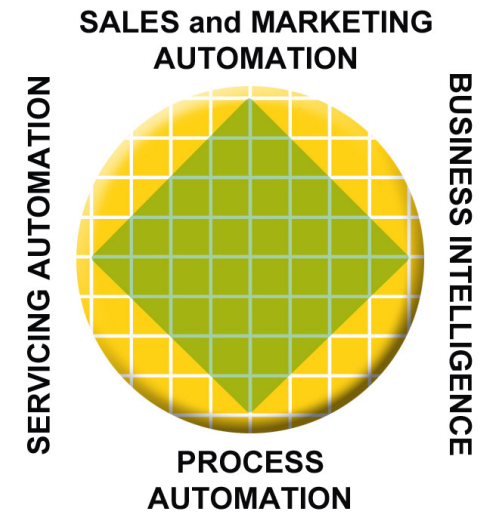
# CRM Comparison Guide

## Microsoft Dynamics CRM and Sage ACT! compared



**Microsoft Dynamics CRM** is a full featured Relationship Management system that works in Microsoft Outlook & includes many embedded MS Office features to create a familiar workspace for fast user acceptance. Also accessible via web browser & by mobile device.

- Includes dedicated sales, service / support & marketing automation tools. Fully flexible and can be tailored to meet most business requirements & processes including capability for tracking multiple relationship structures & different entities beyond contact & company management.
- Suitable for any sized organisation & especially those with multi-site implementations & teams that want to leverage more benefits from existing Microsoft applications including Sharepoint by integrating them with CRM.
- Can be deployed as a cloud based hosted service or installed as an on-premise application.

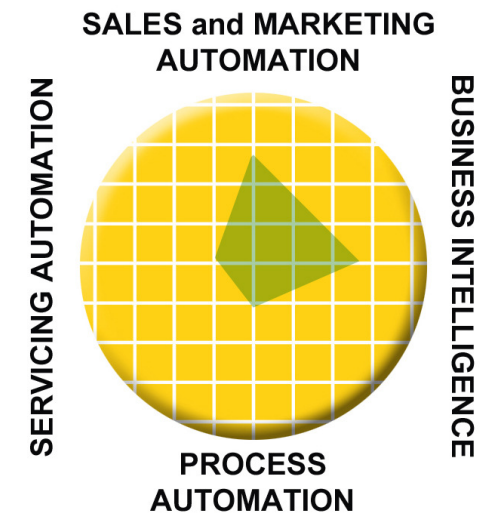


# Sage ACT!

The leading contact management system for over 20 years. An entry-level solution yet offering many of the tools seen in advanced products. Available in 2 editions:

- **ACT! Pro 2012:** entry level edition supports between 1-10 users sharing the same database
- **ACT! Premium 2012:** greater scalability for 1-100 users. Includes ACT! Premium for Web for dual access through a Windows installation &/or by a web browser

The Premium edition includes team based management, improved calendar / scheduling facilities & extended data security tools. ACT! is an easy to use, intuitive CRM system well suited to first time users & businesses planning to implement their first contact management system.



More CRM Planning Guides,  
Project Advice & Downloads





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<p><b>Key Strengths</b></p>	<ul style="list-style-type: none"> <li>• Specialist sales, marketing &amp; service automation tools</li> <li>• Unmatched integration between CRM and MS Outlook</li> <li>• Embeds proven MS Office features for consistent user experience</li> <li>• Advanced personalisation adapts to suit individual preferences &amp; roles</li> <li>• Real-time dashboards can be integrated into CRM views</li> <li>• Windows Workflows enforce consistency &amp; automate tasks</li> <li>• Integrates with back-office application to create a single contact data source</li> <li>• Virtually unlimited customisation &amp; development capability</li> <li>• Multi-currency &amp; multi-lingual</li> </ul>	<ul style="list-style-type: none"> <li>• Leading entry level application for over 20 years</li> <li>• Low cost of investment</li> <li>• Ease of use</li> <li>• Activity / calendar management</li> <li>• Sales Tracking</li> <li>• Mail / Email merging</li> </ul>
<p><b>Layout &amp; Ease of Use</b></p>	<ul style="list-style-type: none"> <li>• Fully accessible in MS Outlook</li> <li>• Menu ribbons use the same familiar structure as MS Office 2010</li> <li>• Web browser &amp; mobile access use a consistent intuitive user interface</li> <li>• Modular design enables the interface to be tailored for each user and team</li> <li>• Enables user to create bespoke CRM views</li> <li>• Pin favourite CRM records, resources &amp; views to the recent list</li> <li>• Change all terminology to reflect your business terms including activity, fields, record types &amp; processes</li> <li>• Real-time dashboards provide click-through analysis on all CRM data</li> </ul>	<ul style="list-style-type: none"> <li>• Create custom layouts and fields as required</li> <li>• Intuitive toolbar &amp; easy to navigate menus</li> <li>• Collapsible menu includes search box &amp; links to contextual ACT! functions</li> <li>• ACT! dashboards provide an overview of activities, sales opportunities &amp; contact data</li> <li>• Fields options include drop down lists, image fields, memo fields &amp; yes / no tick boxes</li> <li>• Welcome screen for new users with tips &amp; 'get started' advice</li> </ul>
<p><b>Networking</b></p>	<ul style="list-style-type: none"> <li>• Installed on a web server for multi-user / office access; or</li> <li>• Deployed to users from a cloud based hosted managed service</li> </ul>	<p>ACT! databases can be shared with teams of users. The software is multi-user enabled and network ready</p>
<p><b>User Numbers</b></p>	<p>Typically 1-5000+ users</p>	<p><b>ACT! Pro</b> : Up to 10 users  <b>ACT! Premium</b>: 1-100+ users</p>
<p><b>Contact Records</b></p>	<p>No upper limit of contacts</p>	<p>Approximate guide: <b>ACT! Premium</b>: up to 100,000 contacts (using Microsoft SQL Standard 2008), <b>ACT! Pro</b>: up to 40,000 contacts</p>



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<b>Remote Access</b>	<ul style="list-style-type: none"> <li>• Web and wireless technology enables access from mobile devices</li> <li>• Offline replication available.</li> </ul>	<ul style="list-style-type: none"> <li>• Inbuilt offline sync facility</li> <li>• Remote live access via VPN</li> <li>• ACT! Premium is supplied with Web software for ease of access sharing the same data</li> </ul>
<b>Mobile Integration</b>	<p>Client Access Licence include mobile access. Device CALs can be assigned to mobile device.</p>	<ul style="list-style-type: none"> <li>• Calendars can be synchronised with Outlook for mobile access</li> <li>• Add-on applications available for direct synchronise with mobile devices</li> </ul>
<b>Database Security</b>	<p>Uses Microsoft Active Directory for user authentication. Completely definable security profiling for individual users &amp; teams.</p>	<ul style="list-style-type: none"> <li>• 5 user security levels</li> <li>• ACT! Premium provides extended control over access permissions to contact records and specific fields</li> </ul>
<b>Contact / Company centric</b>	<ul style="list-style-type: none"> <li>• Stores data at Company, Contact &amp; Lead levels</li> <li>• Can readily be configured to manage other business entities e.g. projects, events, equipment &amp; more</li> </ul>	<p>Essentially contact centric but does enable individual contacts to be linked with company level records.</p>
<b>Multiple addresses</b>	<p>Unlimited multiple addresses</p>	<p>Unlimited secondary contacts per record with individual addresses. Company records can track divisional office addresses.</p>
<b>Calendar</b>	<ul style="list-style-type: none"> <li>• Native Outlook calendar and Microsoft Exchange integration</li> <li>• Service scheduling tools enable key resources to be booked</li> </ul>	<ul style="list-style-type: none"> <li>• Outlook-style daily, weekly, monthly &amp; working week views.</li> <li>• Personal calendars can be synchronised with Outlook or send ACT! activities in iCal format to keep everyone's calendar in sync.</li> </ul>
<b>Managing Sales</b>	<ul style="list-style-type: none"> <li>• Fully customisable sales module</li> <li>• Enables performance to be visualised using live drill-down sales dashboards</li> <li>• Measures progress against targets and sales goals for teams &amp; individuals</li> <li>• Inbuilt quotation generator and product catalogue</li> <li>• Sales process automation includes lead routing, queuing &amp; escalation to ensure prompt attention</li> <li>• Wizard driven scripts to prompt users to qualify &amp; progress opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunity module supports custom sales fields &amp; layouts, configurable products, price lists &amp; sales stages linked to probability</li> <li>• Graphical sales &amp; pipeline dashboards</li> <li>• Supports multi-product sales &amp; user fields</li> <li>• Basic quote template capability</li> <li>• Link individual opportunities with multiple contacts</li> <li>• Opportunity list views can be filtered, sorted &amp; exported to MS Excel</li> </ul>



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<b>Managing Marketing Campaigns</b>	<ul style="list-style-type: none"> <li>• Full marketing suite with campaign management, advanced opt-in/out management, telemarketing &amp; lead routing etc</li> <li>• Marketing reports &amp; dashboards for ROI measurement &amp; integration</li> <li>• Mail &amp; HTML e-mail campaigns</li> </ul>	<ul style="list-style-type: none"> <li>• Full mail-merge capabilities through Word &amp; HTML e-mail.</li> <li>• Swiftpage e-marketing software pre-installed (requires separate subscription to access)</li> </ul>
<b>Reports</b>	<ul style="list-style-type: none"> <li>• Multiple inbuilt reports</li> <li>• Role based contextual dashboards with drill down analysis</li> <li>• Can be developed using HTML, XML &amp; other web services</li> <li>• Utilizes MS SQL analysis services for predictive analytics</li> <li>• Online analytical processing</li> <li>• SharePoint integration enables reports to published outside CRM</li> </ul>	<ul style="list-style-type: none"> <li>• Over 40 customisable reports with inbuilt report writer, supporting graphs, scripting etc</li> <li>• Report selector includes option to select favourite ACT! reports</li> <li>• Configurable dashboard components covering activity, sales, contact and user data</li> <li>• Optional Crystal Reports compatibility available</li> </ul>
<b>Customer Service Support</b>	<ul style="list-style-type: none"> <li>• Complete contact &amp; case history</li> <li>• Service centric dashboard metrics</li> <li>• Full inbuilt case management with SLA monitoring &amp; case escalation,</li> <li>• Wizard driven call scripts help improve information gathering &amp; prompt users to progress issues</li> <li>• Knowledge Base and self service</li> <li>• Supports case queuing</li> </ul>	<p>Provides a complete view of the contact communications history, scheduled activities, and sales opportunities.</p> <p>Web tab enables more contact details to be gathered with direct links to matching names on social networking sites including LinkedIn &amp; Facebook.</p>
<b>Attaching Files</b>	<ul style="list-style-type: none"> <li>• Full file-attachment and remote user synchronisation facilities</li> <li>• Integrates with MS Sharepoint Server to store &amp; publish shared documents</li> </ul>	<ul style="list-style-type: none"> <li>• Full file-attachment and remote user synchronisation facilities</li> <li>• Includes document preview window</li> <li>• Supports document short-cuts</li> </ul>
<b>Activity Types</b>	<p>Fully customisable activity types with user definable fields etc. Activities can be linked to contacts, companies &amp; any other customised entities.</p>	<p>In built scheduling for telephone calls, meetings, to-do's and events or define bespoke custom activity types.</p>
<b>Telemarketing Support</b>	<p>Call campaign functionality including call queuing, data driven call scripts, call allocation and escalation rules.</p>	<p>Schedule call campaigns against a group of contacts.</p>



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<p><b>Searching/ Grouping contacts</b></p>	<ul style="list-style-type: none"> <li>• Perform basic searches to locate &amp; retrieve records</li> <li>• Record set navigation allows users to scroll through records or jump to an item from a list within any record view</li> <li>• Full list management &amp; query building capabilities</li> <li>• Frequently accessed CRM records can be pinned to the recently viewed list</li> <li>• Role based views can restrict contact views based on query rules</li> </ul>	<ul style="list-style-type: none"> <li>• Right click on any field to run a quick look-up search and refine the search with additional criteria</li> <li>• Perform queries using multiple criteria, edit and preview results before running the query</li> <li>• Finds matching entries using search terms in attached documents.</li> <li>• Store contacts in groups and apply membership rules for automated group management</li> </ul>
<p><b>Automated Processes</b></p>	<p>Windows Workflows can be linked with virtually any part of CRM. Enables workflows to be created that automate routine processes to send emails, escalate issues, route tasks &amp; create alerts to remove costly manual data entry</p>	<p>Basic Smart Tasks automatically schedule reminders based on query rules &amp; limited field triggers to prompt follow-up action. Smart Task can be structured in multiple steps &amp; integrated with Swiftpage e-marketing.</p>
<p><b>MS Word Integration</b></p>	<p>Native integration with Microsoft Word.</p>	<p>Create formatted templates using MS Word and personalise with contact detail. (ACT! Premium for Web restricted to ACT! word processor integration only).</p>
<p><b>MS Excel Integration</b></p>	<p>Native integration with Microsoft Excel enabling lists and reports to be output for detailed analysis &amp; enrichment in Excel.</p>	<p>Single click outputs to Excel from most list views with automatic formatting &amp; pivot table creation.</p>
<p><b>E-mail Capabilities</b></p>	<ul style="list-style-type: none"> <li>• Works with MS Exchange Server &amp; Outlook, though can be linked to non-MS-Exchange servers using native Outlook client integration</li> <li>• Can send one-off or bulk e-mails &amp; HTML email templates</li> <li>• Works with Windows Messaging</li> </ul>	<ul style="list-style-type: none"> <li>• Works with any POP3/SMTP compliant email system</li> <li>• Can send one-off or bulk e-mails &amp; HTML graphical email templates</li> <li>• ACT! e-marketing available (requires additional purchase)</li> </ul>
<p><b>Microsoft Outlook Integration</b></p>	<ul style="list-style-type: none"> <li>• Automatically tracks Outlook emails in CRM</li> <li>• Create new CRM contacts, leads &amp; opportunities from Outlook emails</li> <li>• Clear visibility of how each email is being tracked in CRM</li> <li>• Follow links to associated CRM records from individual emails</li> <li>• Customise CRM displays in Outlook with conditional formatting</li> <li>• Create user defined CRM views</li> <li>• Embed CRM dashboards in Outlook</li> </ul>	<ul style="list-style-type: none"> <li>• Send emails from ACT! via Outlook to keep a copy in sent items and apply to the ACT! contact history</li> <li>• Sync contacts between ACT! &amp; Outlook</li> <li>• Create ACT! records from new emails</li> <li>• Schedule ACT! activities from Outlook</li> <li>• File Outlook emails in ACT! automatically using Outlook Rules or attach en masse</li> </ul>



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<b>MS Exchange Integration</b>	Fully native integration with Microsoft Exchange	Can send/retrieve e-mails through Exchange
<b>Lotus Notes Integration</b>	Compatible with Lotus Notes 6.5, 7.0.2 & 8.0 email	Can be configured to send e-mails but by-passes Lotus Notes desktop. Third party calendar integration options available.
<b>Internet Connectivity</b>	<ul style="list-style-type: none"> <li>Fully accessible via Internet Explorer or mobile device. Multi-browser support from April / May 2012</li> <li>Enables offline access with sync updates</li> </ul>	<ul style="list-style-type: none"> <li>Premium edition includes web access</li> <li>Create links to contact websites</li> <li>Launch web-pages based on current record info (e.g. directions on Google Maps, contacts in LinkedIn)</li> </ul>
<b>Website Integration</b>	Can be integrated with virtually any database including client facing portals, online stores etc	Add-on software available captures new leads and enquires (requires separate purchase).
<b>Data Transfer</b>	<ul style="list-style-type: none"> <li>Import data from multiple sources</li> <li>Data conversions are undertaken using the underlying database administration tools</li> </ul>	Supports data import from MS Outlook, text delimited, MS Excel, CSV and dbf data files.
<b>Database Customisation</b>	<ul style="list-style-type: none"> <li>The entire structure of the product can be tailored to meet requirements</li> <li>Enables role based views to be applied to adapt layouts &amp; CRM modules in line with job functions</li> </ul>	<ul style="list-style-type: none"> <li>Customisable template interface</li> <li>Update colours, fonts and business logo's</li> <li>Customisable document and report templates</li> </ul>
<b>Field Definition</b>	Capacity to customise & add fields to virtually every part of the product.	<ul style="list-style-type: none"> <li>Flat-file structure. Add relational tables by programming</li> <li>Unlimited user-definable contact fields including text, numeric, date, tick-boxes &amp; image fields</li> </ul>
<b>Telephony Integration</b>	Optional CTI integration can be applied for inbound & outbound telephony automation, including pop-up functionality for inbound calls, forwarding of calls to other users and fast auto-dialling.	Limited inbuilt integration with some UK TAPI compliant systems using third party add-on applications (requires separate purchase).





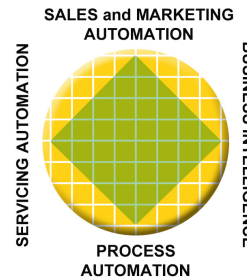
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<b>Accounting Integration</b>	Can be configured to integrate with most accounting systems.	Includes integration links with Sage 50 Accounts.
<b>Programming Options</b>	Using ASP .NET development techniques, the possibilities for integrating & developing with Microsoft CRM are infinite.	.NET application enabling development of plug-in modules, modification of table structure and Virtual Basic scripting in field definitions & report templates
<b>Integration with other databases</b>	<ul style="list-style-type: none"> <li>Inbuilt integration with MS SharePoint, SQL Reporting Services &amp; other Microsoft technologies</li> <li>Virtually any data source can be read live into Microsoft CRM to display query &amp; report on data using native functionality.</li> <li>Dynamically exchange data with most other systems through programming</li> </ul>	<p>Through programming it is possible to link ACT! with external ODBC databases.</p> <p>Optional add-on application can undertake overnight batch data import/export &amp; update of existing records (requires additional purchase).</p>
<b>Database Engine</b>	No database engine included. Requires Microsoft SQL Server (excludes Express edition).	<p><b>ACT! Pro</b> – Microsoft SQL 2008 Express</p> <p><b>ACT! Premium</b> - Microsoft SQL 2008 Express. Can also connect with SQL Standard 2008 (requires separate purchase).</p>
<b>On-Screen User Help</b>	<ul style="list-style-type: none"> <li>On-screen help.</li> <li>Online CRM resource centre includes training videos, tips &amp; blogs for shared best practice and advice</li> </ul>	<ul style="list-style-type: none"> <li>Application help available from Help Menu</li> <li>Welcome screen available for new ACT! users includes quick start tips</li> </ul>
<b>PC Req'ts</b>	On-Premise edition requires Windows Server 2003/2008, IIS 6.0 or 7.0, 2GB RAM or higher, 10/100Mbps network card. Cloud edition requires only Internet Explorer	Windows 7, Windows Vista, XP, Windows Server 2003/2008 with recommended 1GB RAM and 1GB hard disk space.
<b>Licensing structure</b>	Client Access, Device Access, Limited Access licences and external connectors are available. Separate server licence is required.	Licensed on a strictly named user basis.
<b>Client licence Costs (per user)</b>	<p><b>On-Premise:</b> Server licences start from around £1,800+VAT, Client Access Licences - from £760+VAT</p> <p><b>Hosted:</b> £29.50+VAT per user each month</p>	<p><b>ACT! Pro</b> - from around £190+VAT</p> <p><b>ACT! Premium</b> - from around £250+VAT</p>



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<b>Licence Maintenance</b>	On-premise licence prices include software assurance maintenance for 3 years. Hosted CRM ensures the latest build is available.	No mandatory licence maintenance agreement. New licences typically include annual phone support.
<b>Upgrading</b>	CRM upgrades are freely available to software assurance holders & cloud subscribers. 2 scheduled CRM releases each year.	New versions released annually. Upgrade discounts available for existing customers with supported versions of ACT!
<b>Deployment methods</b>	<ul style="list-style-type: none"> <li>• On-Premise</li> <li>• Microsoft Dynamics CRM Online managed hosting from Microsoft</li> <li>• Preact Partner Hosted Support</li> </ul>	On-Premise though hybrid option available for ACT! Premium from £15+VAT per user each month (in addition to the cost of ACT! licences)
<b>Owned by</b>	Microsoft Corporation Corporate HQ - Washington US <i>Development Team</i> - Mainly US based	Sage CRM Solutions Corporate HQ – Newcastle UK <i>Development Team</i> – UK, Ireland & USA
<b>Age of Software</b>	First release in 2003. Used by over 30,000 businesses with over 2m users in 80+ countries	First release in 1986 currently approximately 2.7m users in 25 countries.
<b>Summary</b>	<p><b>Highly customisable CRM that is fully accessible within Outlook &amp; includes many proven MS Office productivity features.</b></p> <p>Leverages existing Microsoft technologies by integrating with applications including Sharepoint &amp; Exchange.</p> <p>Dynamics CRM adapts in line with business processes &amp; user preferences for a full suite system that connects multiple teams and locations within an organisation.</p>	<p><b>Entry-level contact management software that is a highly popular package for small to medium sized businesses.</b></p> <p>By including sales management tools, interactive dashboards &amp; marketing features, ACT! is a highly versatile, &amp; scalable solution that offers a low cost of entry.</p>



## **ABOUT PRACT**

Preact is an independent Customer Relationship Management (CRM) consultancy working with businesses in the private sector as well as charities and educational organisations.

As multiple award winning CRM architects, we've been helping businesses achieve results their CRM strategy since 1993. Our experienced team combine strong consultative skills with professional implementation methodology and a commitment to customer service excellence.

By working with Microsoft Dynamics CRM and Sage ACT! we offer vendor-neutral advice to help businesses select the most effective solution for their unique requirements and help organisations achieve greater success from their existing CRM system.

## **OUR APPROACH**

We work with all sized businesses in numerous industries with CRM deployments varying from 1-200 or more users. We take a product agnostic approach to pre-sales to help you choose a CRM solution that will meet your immediate requirements and support continued business growth. Our consultants will discuss your plans in detail and help you test our recommendations before you commit.

We're committed to an on-going evaluation of our performance so we actively seek client feedback to ensure we're delivering on our brand promise of exceeding customer expectations. We were proud to receive the 2011 Sage Circle of Excellence award in recognition of the quality of our service based on independent feedback

All of our implementation team hold the highest accreditations, including Microsoft CRM Implementation, Customisation and Developer Certifications, Microsoft Surestep Project Management, Prince2 accreditations and Scribe Certification ensuring that every requirement is expertly managed at each stage. Our status as a Microsoft Gold Competency partner for CRM demonstrates our commitment to quality standards and our ethos for supporting CRM clients and delivering new projects.

We offer a full range of pre-sales, technical consultancy, development, training and support services to cover every step of your CRM project.

Our CRM projects have included implementations for John Lewis Plc, Toshiba Air Conditioning, East Berkshire College, Scottish & Southern Energy, Cranfield University & Europe's largest ACT! implementation for Oxford Instruments Plc.

