Remote Access Options for ACT! and Act4Advisors

ACT! combined with the Act4Advisors add-on allows financial planners and investment advisors the fullest use of their ACT! software.

Advisors and their staff often demand immediate access to their data from anywhere at any time. The importance of remote availability of client and prospect data has been in greater demand since the internet and portable devices have made that access possible. Combine this ability with the newer technology and users can now work from just about anywhere while still being fully connected to their office and their data and applications.

The purpose of this white paper is to distinguish the various options to data portability for ACT!. Data portability allows 3 broad choices:

1. Full Application and Data Access
2. Limited Application and Data Access
3. Data Access only

Each of these access methods has its pros and cons. We will explore each of these methods to make it easier to decide which of them will work best for each Act4Advisors user.

Full Application and Data Access (FADA)

Having full access to the ACT! software and database gives the user complete access to data and the functionality of the ACT! and Act4Advisors applications. Remote access under this option includes *Database Synchronization* or *Remote Access*.

Database Synchronization:

ACT! includes a native feature allowing users to establish a database to database synchronization. "DB Syncing" will allow a main (publisher) database to send and receive changes from a remote (subscriber) database thus allowing both databases to exchange information. This method of FADA requires each user to install and use the ACT! and Act4Advisors programs on their native computers but each user would have access to a local database running on their own computer or on a local area network. As a result, each user will require separate ACT! and Act4Advisors licenses.

Sync Options

DB Sync options vary based on the version of ACT! being used. For example, both basic ACT! by Sage and ACT! Premium allow synchronization known as *Application Sync*. This means that both ACT! databases must be open and connected to the same network to establish the sync. This scenario is ideal for an advisor or an employee who will leave the office periodically and will need to work "offline" on their remote computer. When the user comes back to the office, they would connect to the network and "synchronize" with the publisher database.

Two other sync options are available only to ACT! Premium users. These two methods include *Network Sync Service* and *Internet Sync Service*.

Unlike the standard ACT! by Sage, ACT! Premium does not require that ACT! be open and running on the server. Instead, a sync server can have a "sync service" running allowing the main and remote databases to synchronize unattended.

Database synchronization described here requires technical knowledge regarding ACT!'s sync features as well as knowledge about TCP/IP and even IIS. Our normal recommendation for setting up sync is to utilize a qualified technical person who specializes in ACT! ACT! Certified Consultants are best equipped to setup and maintain synchronization.

Setup requirements:
Advanced

Cost of requirements:
Moderate to High

Remote Access:

Due to the fact that financial professionals retain sensitive personal data in their databases, it is not normally recommended that the database be stored on a traveling computer and moved regularly from one location to another (as described above). But, in some circumstances, this is the only choice.

Another possible method of FADA is to utilize ACT! via remote access software and the internet. Remote Access allows full access to either the ACT! application itself OR the entire remote computer's desktop.

Several methods of remote access are available including Microsoft Terminal Server, Citrix Metaframe or remote software services such as Gotomypc, Logmein or PCNow.

Terminal Server and Citrix Metaframe are server installed applications allowing multiple users to remotely control either an individual application or the entire desktop of the server it is installed on. The benefit of these allows multiple users access to one server computer simultaneously but these solutions can be costly to license and qualified IT professionals are normally needed to installed and implement.

The remote software services such as Gotomypc are inexpensive and can be easily implemented without any IT help. These programs allow the user to access their office or home computer remotely giving the user full access to their entire computer. The only downfall of these solutions is that the remote computer cannot be in use by another person while the remote session is active.

Setup requirements:
Low (for remote software services)
Advanced (for Terminal Server or Citrix Metaframe)

Cost of requirements:
Low (for remote software services)
High (for Terminal Server or Citrix Metaframe)

Limited Application and Data Access (LADA)

ACT! Premium for Web (APFW) is a separate offering from Sage Software. We consider it to be limited in regard to features compared to the ACT! desktop applications.

Unlike the synchronization method above, remote users of APFW do not have the database installed on their local computer or their local network. Full access to the allowed data is determined by the administrator and the host of the data has complete control. Remote users have access via Internet Explorer.

APFW installs locally on a desktop or server computer or it can alternately be hosted at a third party hosting company. The local APFW application has the same features as the regular ACT! Premium product but the database can be setup to be shared over the internet.

Web users of the APFW interface enjoy many of the same features as the desktop version of ACT! but the user experience is more like a web based CRM system. Nuances such as waiting for screen refresh and limited word processing and emailing functions are the same as any web based app. Also, some ACT! features are not available such as Outlook calendar synchronization and very few third party add-ons are available.

Unlike other web based apps, APFW can still (optionally) synchronize to remote databases. This means that a remote sync computer would not need internet access if it is synchronizing with the ACT! desktop software.

APFW requires a knowledgeable IT or ACT! consultant to install and setup correctly. Server security requirements are higher for APFW and this increases the cost of the software up front. There are no ongoing fees unless the database is hosted by a third party company.

Setup requirements:
Advanced

Cost of requirements:
Moderate to High

Data Access Only (DAO)

In many circumstances, users will only require remote access to limited contact data in ACT! For example, a user might be on the road and need a phone number, address or last few notes or histories recorded.

With the Data Access Only model, a user can use either a PDA (such as a Palm, Windows Mobile Device or Blackberry) or they can have a backup copy of the ACT! database on their laptop.

Even though a copy of the database gives the user full access to the data, the user must be cautious to not create or change records since these records would not make it back into the main database.   This backup copy of the database would be used for reference only.

A PDA is a small, portable device allowing the user to lookup basic data that would be contained in ACT! such as names, addresses, phones, email, calendar, etc. Most PDAs used nowadays are also mobile phones giving the user a dual purpose for the device.

Data in ACT! can be synchronized directly to the PDA using ACT!'s build in feature or via third party software such as *CompanionLink* or *HandheldContact.* We recommend the later option since the ACT! synchronization feature to PDAs has some limitations.

CompanionLink is the most flexible syncing software since it includes both wired and wireless sync to most types of PDAs including those listed above and the new Apple iPhone. CompanionLink can sync via a cable or cradle or wirelessly via the internet with its optional subscription model. CompanionLink offers free telephone support and free upgrades with its software and its subscription offering.

HandheldContact (HHC) is another company offerings syncing between ACT! and Blackberry or Windows Mobile devices. Its service is exclusively web hosted and wireless. Syncing is done via the internet requiring special web services to be subscribed to on the PDA. A monthly fee is required since the data in your ACT! database is transmitted via the HHC servers directly to your PDA. HHC also includes upgrades and support as part of its subscription.

Setup requirements:
Moderate

Cost of requirements:
Low to Moderate

Question and Answers

I am an advisor with an assistant and we both want to be able to work from home occasionally. What do you recommend?

If each of you have a desktop computer at your office and a high speed internet connection, we recommend that you use Gotomypc. These programs allow you full access to your entire computer from any remote location. Gotomypc will even allow you to print and send and receive files remotely.

I am an advisor with a large staff. I am only in the office once a week and when I am not in the office, I do not have internet access on my laptop. I want full access to my data and plan on entering notes and new contacts regularly. What do you recommend?

Since you will not be in the office and not have access to the internet, we recommend that you use Application Sync or Network Service Sync. You would synchronize your database when you are connected to the network.

We have 4 locations and all have internet access. We each keep our own databases but some contacts need to be shared among the 4 locations. What is the recommendation?

In this scenario, you could choose 3 options:

1. Terminal Server/Citrix where ACT! is only installed on one server.
2. Database synchronization using either Internet Sync Service or Network Sync Service and ACT! is installed on all workstations and the server.
3. ACT! for Web installed on one server/

Consider the pros and cons of each of these in the discussions above.

I am an advisor who occasionally leaves the office for meetings. While I am away, I would like access to names, addresses, phones, emails and basic history. What is the recommendation?

Consider using a PDA and using either CompanionLink or HandheldContact. The PDA will give you access to basic data and can be synchronized to the main database.

I am an advisor who occasionally leaves the office but I would like full access to my ACT! database for archival and reference purposes only. What is the recommendation?

We recommend that you simply backup and restore the database to your laptop computer. Be care that the laptop is encrypted incase the laptop is lost or stolen.

I am a managing director of a multi-branch financial firm. I have oversight responsibilities for all of my branches and need to have access to each branches unique database. What do you recommend?

Consider using Gotomypc or Terminal Server installed on the server of each branch. This would give you access to the Act4Advisors database from any location.

Allied Financial Software, Inc. is software consulting firm focused on technology solutions specific to financial services companies. Specializing in CRM and client management applications since 1993, AFS has developed customizations for ACT!^{TM} by Sage and has become a Platinum level ACT! Certified Consulting organization.

Further information can be located at www.software4advisors.com

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