

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

*This article appeared in the October 2005 ACT! Extra Newsletter<sup>i</sup> and was written by Stacy Roach,<sup>ii</sup> ACT! Certified Consultant. It is the most concise and readable comparison between all versions of ACT! It has been edited by Synthesis, Inc. and reprinted with permission.*

ACT! 2005, which launched last year, was a significant upgrade as it represented a complete and total re-write of the ACT! application. **ACT! 2005 was written with an SQL back-end and is a Microsoft .Net application.**

We continue to see a lot of clients using older versions of ACT!, which we refer to as “**ACT! Classic.**” This includes ACT! 4.0, ACT! 5.0, ACT! 2000 and ACT 6.0. Let’s talk about reasons for upgrading from ACT! Classic as well as ACT! 2005 to the current version of ACT! 2006.

### **ACT! 2006 vs. ACT! 2006 Premium for Workgroups**

ACT! introduced two versions of the application with the launch of ACT! 2005, ACT! 2005 Standard and ACT! 2005 Premium for WorkGroups (**PFW**) and many users continue to be confused by the differences between the two products. Both are ACT!, and while they share a great deal of typical ACT! functionality, there are a few significant differences. Depending on your business needs, you may want to upgrade to the Premium for WorkGroups product, whether you are coming from ACT! Classic or ACT! 2005 Standard. We constantly discover many people purchased Standard when they really needed some of the functionality of Premium. **So, our recommendation is to review the differences closely and make your decision based on the functionality that best meets your business needs.**

**The biggest difference between Standard and Premium for WorkGroups is the number of users that ACT! will allow.** ACT! Standard will only support up to 10 named users in a database. Below, we’ll list some of the great new ACT! features; some of these are specific to the Premium for WorkGroups edition of ACT! and we’ll point them out accordingly.

### **System Requirements**

***New software is not designed for old computers and ACT! is no different. The new versions of ACT! (both ACT! 2005 and ACT! 2006) require beefier hardware to run effectively on the end user’s machines.***

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

The *minimum* required specifications from Sage Software include a **Pentium III, 500 MHz Processor with 512 MB of RAM** (memory) and a **minimum of 500 MB free space** on the hard drive.

*Independent testing tells us that while you might technically get the product to open on a machine with those specs, our recommended minimum specs for running the software in the real world look more like this:*

- **Pentium 4, 1.6 GHz (the faster the processor, the better)**
- **1 GB RAM**
- **1 GB of free space**

We understand that many small businesses use ACT! and acquiring new hardware to support your ACT! users might make you want to pull your hair out. But a quick scan of some major PC manufacturer's web sites showed that you can get a pretty hefty desktop machine with a fast processor and lots of RAM for less than \$1,000. And remember, absolutely everything you do on that machine, be it ACT!, e-mail, PowerPoint presentations, MS Word documents, etc., will be faster and more productive than on that old Pentium III, 256 MB RAM machine you have now.

### Top Reasons to Upgrade to ACT! 2006

**Lotus Notes Email Integration:** If you use some flavor of Outlook, you are probably asking yourself, why you need to be concerned with Notes Mail Integration. The answer is - you don't. But if you are an ACT! User that is in the 23% of companies that use Notes Mail as opposed to Outlook, you are cheering. ACT! 2006's new integration with Notes Mail is a big win for all those ACT! Classic users that were not able to upgrade to ACT! 2005, because that version lacked the critical integration with Notes Mail. So, if you are on Lotus Notes version 6.5, you can now use ACT! 2006 with the critical e-mail integration that ACT! Users need. After all, if you can't go to a contact and see all the history, including email communication, what is the point?

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

**Company Level Records:** ACT! 2005 introduced the concept of managing contacts that work for the same company at the organization, or Company level. This allows you to see all the contacts and their associated history, activity and opportunities at this Company level. You can also track information in fields that are applicable to Companies like Annual Revenue, Number of Employees, Address, and Phone information, rather than tracking that information on a Contact level.

ACT! 2006 improves this functionality by adding a hyper link from the Contact Detail View to the Company View, improving the navigation from a Contact to the associated Company.

**Dynamic Group Membership:** With ACT! Classic, you could create Group rules that would populate a group based on either a field or a saved query, but that occurred only when a user *manually* ran Group Rules in the database. My view is that anytime you rely on a user to manually perform a function, you will see incomplete results. In addition, the Group Rules function in ACT! Classic would *add* contacts to Groups, but would not *remove* them. This required a periodic and manual clearing of all contacts and re-running the Group Rules.

With ACT! 2005, you could create a criteria based on the content of a Contact field or fields and this would *dynamically* link all contacts to that Group without any manual intervention from a user. For example, if you created a Group for Prospects, you could set the criteria for membership based on the ID/Status field. And if a Contact had the ID/Status of Prospect, that contact would automatically and dynamically be added to that Group. If the ID/Status of that Contact then changed to Client, then that contact would be automatically and dynamically removed from that Group.

The only downside to this great new feature was that the dynamic group membership was not displayed on the Group tab in the Contact Detail View. This meant that when you clicked on the Group tab for a particular Contact, you would only see the Groups that that Contact had been *manually* added to. ACT! 2006 has a new feature that allows you to see both manually added or "*static*" Group membership, as well as dynamic Group membership.

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

And speaking of Group Membership, in ACT! Classic you could easily add a Contact to Multiple Groups from the Group tab in the Contact Detail View, a feature that was sorely missing in ACT! 2005 and that was thankfully returned to the product with ACT! 2006.

**Sales Opportunity Tracking:** This is one of my favorite new features of ACT! 2005. The Opportunity View allows users to view the opportunities for all their contacts in a single window. The Opportunity View allows you to filter the opportunities in a variety of ways. For example, you might want to view the highest probability deals with the largest dollar volume. The new Sales Opportunity function also allowed users to include multiple products in a single opportunity and let you customize eight user fields to track additional data on a deal. Unfortunately, you could not set those user fields to anything other than text, nor could you manage a drop-down list for any of those fields.

ACT! 2006 PFW adds the ability to customize the type of information that goes into those fields; for example, you might want to designate that a field will hold a currency or date value. You can also make the eight opportunity fields mandatory, and use drop-down lists to ensure data accuracy.

**One-click Export to Excel:** Another of my favorite new features of ACT! 2005 has to be the one-click export to Excel. This is available to quickly export contacts by clicking on an icon in the Contact List View. Or, you can export Sales Opportunities to Excel which would also create Pivot Tables in Excel. This functionality allows for quickly and easily dumping Contacts and/or Opportunities into Excel where the data nerds in us all could do some further analysis and reporting. The only downside is that you could not remove that function for Standard Users. This meant that a Standard user could dump the entire database to Excel and take your valuable company asset – your contacts – out the door. With ACT! 2006 you have the ability to restrict that function by user.

**Custom User Permissions:** ACT! 2005 introduced 2 new levels of Users: Restricted and Manager. This allows companies to better manage which users could perform certain functions in the database. ACT! 2006 PFW takes it one step further by allowing the Administrator to customize what permissions a User has in several key areas, such as the Export to Excel Feature we discussed above. Other areas of custom permission settings include the ability for a User to delete Contacts, Companies, Groups, Opportunities and

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

Activities Series that he/she created; perform administrative tasks on remote databases; sync the ACT! database to a hand-held device, like a Palm; and perform accounting link tasks. As of this writing, only the accounting link for Peachtree is available. The links to Business Works and QuickBooks are scheduled to be released momentarily.

**Hierarchical Tree Views:** ACT! 2005 introduced the ability to have up to 15 levels of Sub-Groups. 15!!! Coming from the ACT! Classic world of 2 (yep, only 2) levels, the ability to have 15 levels was exciting. However, there was one small glitch. In the Group List view, if you were viewing both Groups and Sub-Groups, ACT! would sort that list alphabetically by the Group or Sub-Group name. And while you could go to a Group and see a list of all the Sub-Groups under that Group in the Sub-Groups Window, you could not see a true hierarchy of your Group structure, with all the Sub-Groups visible. ACT! 2006 re-introduced the Tree view of Groups so that you can click on a plus sign in front of a Group and see a list of all the Sub-Groups underneath and so on, through all 15 levels.

Much of the Company level functionality mimics Group functionality, so this Hierarchical Tree View also applies to Companies and Divisions. Our one complaint in this area is that the Company functions are still a sub-menu of the Group pull-down menu. We would really like to see a separate Company pull-down menu. Maybe in ACT! 2007...?

**Limited Contact Access:** ACT! 2005 PFW introduced the ability to limit the access to a Contact record by User or Teams. This meant that you could control which Users had access to which contacts. For example, if you could limit each Sales Representative to the contacts in his or her own territory, but give Managers in the company the ability to see all contacts in the database. Again, this was a great new piece of functionality with a small design flaw. You had to set the Access one contact at a time. This was mind-numbing work on a large database and prone to user error.

ACT! 2006 PFW allows you to set the contact access for a whole bunch of contacts at once. For example, you can now perform a Lookup of all Contacts in a particular Territory and change the contact access to a specific User and/or Team for that entire lookup. You can also now perform a Lookup of Contacts by their assigned access, as well as Lookup which Users or Teams have been granted Access to Contacts. This makes managing the Contact Access feature much easier.

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

**Database Synchronization:** ACT! 2005 came with a whole new, reliable and scalable sync function. The new sync function is easy to setup and maintain. However, there were a few pesky design issues that were corrected in ACT! 2006.

ACT! 2005 made use of a Remote Database Expiration. The idea was that if a remote user did not synchronize within a certain timeframe, the Remote Database could no longer sync with the Main database. While theoretically a good idea, the upper limit was 90 days, and if a user just forgot to sync before the expiration, then that remote database could never sync again. This left that remote database and all the data in it, orphaned. With ACT! 2006 PFW, you can now set the Expiration as high as 365 days and even after a remote database expires, you can still send one last sync to the main database. You can also set a remote database to synchronize automatically to further reduce the chance that a remote database will expire.

Another major design flaw with ACT! 2005 Synchronization was with attachments. Now, don't get me wrong; I think the design and development teams were going in the right direction with attachment sync but they just didn't hit the mark the first time out. In the ACT! Classic sync model, the only thing to sync was the data itself. Supplemental files such as attachments, templates, layouts, queries, reports, labels, and envelopes were not included as part of the synchronization process. This meant that if you updated any of those items on the main database, the remote sync user would not get them through the synchronization process.

With ACT! 2005, those supplemental files were included as part of what we call the "Data Store." This meant that anything and everything in the attachments, backup, layouts, queries, reports or templates folders, would sync out to all remote users. So far, so good. The issue with attachments was that although you could limit which **contacts** were sent to a remote sync user through the sync set, **all** attachments for **all** contacts in the database would sync. This had two potentially negative impacts. One, users could view attachments for contacts that they did not have access to, and two, the syncing of attachments for a large database could take a really, really long time. With ACT! 2006, attachments will only sync to a remote database for those contacts defined in the sync set for that database.

## ACT! Classic (6.0 or older) vs ACT! 2005, 2006 Standard & Premium Workgroup Version

---

**ACT! 2006 Premium for WorkGroups Administration Functions:** ACT! 2006 PFW continues down the path first forged by ACT! 2005 PFW to better support ACT! users in larger organizations and workgroups. First, the ability for ACT! to support up to (and in some cases well over) 50 concurrent users means that ACT! is edging up from the small business, 5-10 user space it has dominated for so many years. ACT! will continue to serve that market segment well with its ACT! 2006 Standard product, but the Premium for WorkGroups product family is really designed to meet the needs of larger organizations.

**Silent Install:** In most organizations that have dedicated IT staff, the IT folks closely “manage the application environments” for their users. This means that users do not always have sufficient permissions to install software, and can mean that IT controls application installation remotely. While ACT! 2006 PFW still requires Administrative level permissions on the machine to install the program, a user with Non-Administrative level permissions can now run the application on their workstation after an Administrator installs ACT!.

With the launch of ACT! 2006 PFW, the IT staff can set up ACT! using what is known as a “Silent Install.” Silent installations run without any user input and with no indication to the user that an installation is occurring.

**ACT! Scheduler:** With ACT! 2006 PFW, you can use the ACT! Scheduler to setup an automated backup of your ACT! databases, including Remote Sync databases. This insures that your ACT! database, and all of the associated supplemental files, including Attachments, Backups, Layouts, Queries, Reports and Templates, will be backed up regularly without having to rely on an administrative user to manually backup the database. We would also recommend that those backups be backed up to a remote or off-site facility as well.

**Citrix and Terminal Services Support:** Many companies, in an effort to reduce IT support costs, are increasingly using Terminal Services or Citrix solutions in their IT environment. When a user runs an application on a Citrix or Windows Terminal Server, the application is installed only on the server and all of the application execution takes place on the server. Only the keyboard, mouse and display information are transmitted over the network. Using Citrix or Terminal Services, companies can make sure that all

**ACT! Classic (6.0 or older) vs ACT! 2005, 2006  
Standard & Premium Workgroup Version**

Users are on the most current versions of an application because the software is installed only once on a server, rather than on every workstation throughout the organization. This model reduces the costs and challenges of updating user machines, especially for remotely located workstations or branch offices. **ACT! 2006 is the first version of ACT! to be officially supported in a Citrix or Terminal Services environment.**

**The charts below are a comparison of the features & functionality of ACT! Classic, ACT! 2005 and ACT! 2006, both Standard and Premium. These features fall broadly into two categories: End User Functionality or Administration and Security.**

*Figure 1. This chart is a comparison of the features & functionality of ACT! Classic, ACT! 2005 and ACT! 2006, both Standard and Premium. These features fall the Administration and Security category.*

Features & Functionality	ACT! Classic	ACT! 2005 Standard	ACT! 2005 PFW	ACT! 2006 Standard	ACT! 2006 PFW
<b>Administration &amp; Security</b>					
Support 1-10 Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Support 11-50 Concurrent Users			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Support Larger WorkGroups & Teams			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
5 Levels of User Permissions		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Custom User Permissions					<input checked="" type="checkbox"/>
Ability to Create & Manage Teams of Users			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Ability to Run ACT! with Non-Administrator User Privileges on the Machine	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
Limit Contact Access Based on Users and Teams			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Manage Contact Access for Groups or Lookup Results (versus one Contact at a Time)					<input checked="" type="checkbox"/>
Lookup Contacts Based on which Users and/or Teams have Access to those Contacts					<input checked="" type="checkbox"/>
Enhanced Database Synchronization		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automated Database Synchronization					<input checked="" type="checkbox"/>
Remote Sync Database Expiration up to 365 days	N/A			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Synchronize Attachments		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Synchronization of Attachments Based on Sync Set				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Allow Remote Users To Perform Selective Administrative Functions				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automated Database Backup					<input checked="" type="checkbox"/>
Citrix or Terminal Services Support	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silent Installation & Activation					<input checked="" type="checkbox"/>

**ACT! Classic (6.0 or older) vs ACT! 2005, 2006  
Standard & Premium Workgroup Version**

**Figure 2.** This chart is a comparison of the features & functionality of ACT! Classic, ACT! 2005 and ACT! 2006, both Standard and Premium. These features fall the End User Functionality category.

Features & Functionality	ACT! Classic	ACT! 2005 Standard	ACT! 2005 PFW	ACT! 2006 Standard	ACT! 2006 PFW
<b>End User Functionality</b>					
One-Click Export to Excel of Contacts and Opportunities for Data Analysis		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Separate Notes/History Tab for Clearer History Tracking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Use of Field Criteria to Dynamically Assign Contacts to Groups & Companies		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Static and Dynamic Group Associations in Contact Detail View	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Groups and SubGroups in a Hierarchical Tree View	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage up to 15 Levels of SubGroups		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add/Remove Contacts to Multiple Groups from the Group tab on the Contact Detail View	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Contacts at the Company Level		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View Companies and Divisions in a Hierarchical Tree View				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Company Association Hyper Link from Contact Detail View to Company Record				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Integration with Outlook 2000/2002/2003, Outlook Express 5.5/6.0, Eudora 5.2/6.0 and Internet Mail SMTP/POP3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Lotus Notes Email Integration	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Enhanced Sales Opportunity View and Tracking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customizable Opportunity fields					<input checked="" type="checkbox"/>
Easily Edit the User Assigned to a Previously Scheduled Activities	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Display Phone Numbers on Printed Calendars	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customized Activity Types		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Resources such as Conference Rooms and Equipment for Scheduling			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Picture, Memo and Check-Box Fields		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Send Meeting Invitations to Other ACT! Users			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Import Other ACT! Databases of the Same Version, Preserving Record Manager Associations	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Synthesis Note:** You **LOSE** in the 2005 & 2006 version the ability to do HTML emails without a 3rd party application plus you lose the ability to create macros, modify drop down menus, edit and create reports. Many of your reports and templates will not upgrade to the 2005/2006 version.

<sup>i</sup> ©2005 Buzz Publishing | PO Box 828 | Roswell GA 30077-9844 | Toll Free 888-422-9267 | outside the US 770-518-0309 | FAX 770-992-9549

<sup>ii</sup> Stacy Roach is an ACT! Certified Consultant and ACT! Premier Trainer with Power of 3 Consulting, Inc. (866) 362-4263 (serving the San Francisco and Bay area)