

Synchronization

ACT! 2005-2006



The “Experts”???

- *Can there really be any experts in sync?*

- Clifford Roberts

- NextCRM

- (Sage, Best Software, Interact Commerce, Saleslogix, Symantec)

- Certified ACT! Fanatic
 - 9 yrs. - ACT! Support, Helpdesk, Product Manager, Marketing Manager, Quality Assurance Manager, Development Liaison , & Sales Systems Engineer



ACT! Synchronization Defined

- “The process of allowing multiple copies of the same data to exist in different places at the same time”
- “The process of tracking changes to the data in multiple places and transport of these changes from one database to another”



Sync - The Old Way

ACT! 3.0x

ACT! 4.0x

ACT! 5.0x

ACT! 6.0x



Sync - the Old way (3.x – 6.x)

□ How to Sync:

- E-mail
- Shared folder
- Modem – Modem
- Direct Database to Database

□ Sync Options:

- Send or Receive Only Options
- Private Data
- Field Definitions
- Collection Groups



Sync - the Old way (3.x – 6.x)

□ Problems

- Not 100% reliable
- Lost Packets
- Corruption
- Sync Histories (My Record)
- Deleted Records to Manage
- Evil Twins
- Transaction Log corruption
- More???



Sync - The New Way

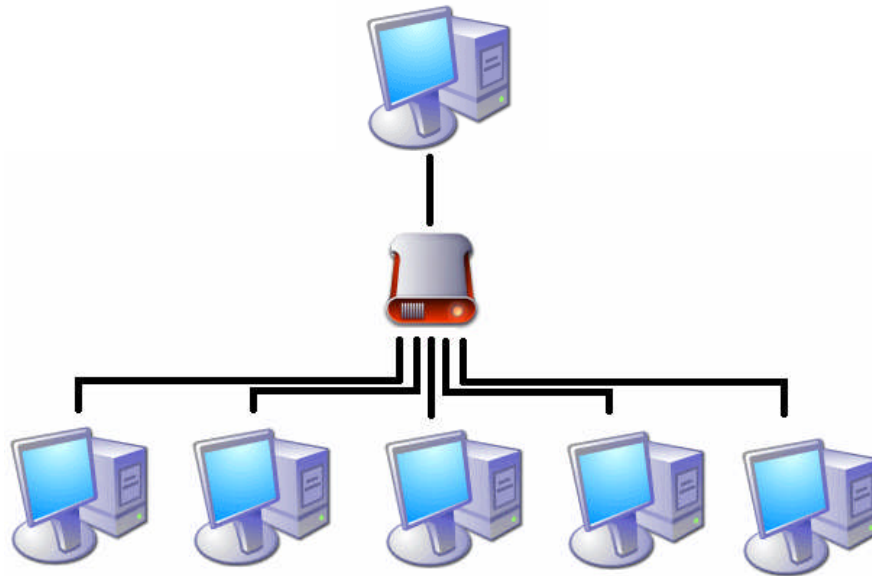
ACT! 2005-2006 Standard

ACT! 2005-2006 Premium



Sync - the new way (05-06)

- How to Sync:
 - Direct Database to Database (Publisher/Subscriber Model)



Sync - the new way (05-06)

□ What Data Syncs?

- User Tables
- Field Definitions (Schema from Main database to Remotes)
- Database settings and preferences
- All User records (and extended data)
- Group and Company records
- Query definitions, and extended data
- Custom activities, custom priorities, custom clearing types, events, activity series, opportunity processes



Sync - the new way (05-06)

- Optional items that Sync?
 - Database Supplemental Files, (layouts, reports, etc..)
 - Attachments to contacts (emails, .docs, .pdfs, .xls, etc..)

- Important Facts
 - Remote db is a “TRUE” subset of centralized db
 - Remote db ONLY has ability to initiate sync
 - Remote db can EXPIRE (still functions, no ability sync)



Sync – Why Change? (05-06)

- ❑ Reliability, Security, All Inclusive, Administrative Control
- ❑ Model that mirrors the workgroup experience
- ❑ Is a database to database process, not a user to user process
- ❑ Adheres to a publisher-subscriber model
- ❑ There is one central publisher & many remote subscribers
- ❑ All remote subscribers will be TRUE subsets of the main db
- ❑ There is no longer the concept of peer-to-peer sync
- ❑ There is no longer E-Mail, Shared Folder or Modem sync

New - Sync Methods

- Application Sync (Standard & Premium)
- Network Sync Service (Service, Premium)
- Internet Sync (MS IIS Service, <http://>, Premium)



Sync - Application Sync

□ Application Sync

- Requires ACT! to be running and Main database open, “listening” for incoming sync

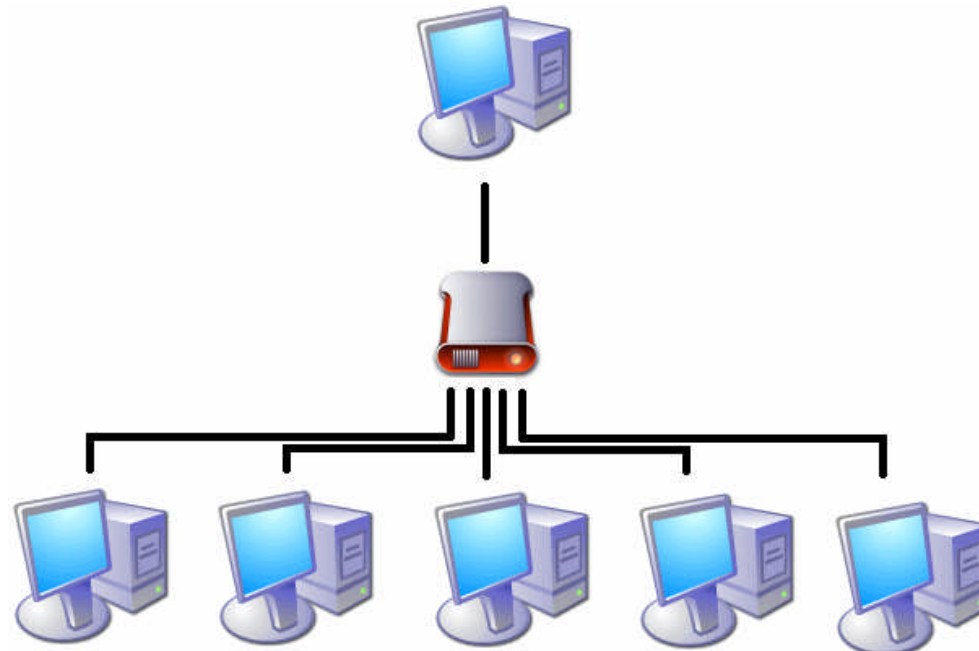
□ Downside:

- ACT! db has to be open
- Can only sync one parent database at a time
- Users have to be on the LAN
- Sync method for ACT! Standard (errors in Premium)



Sync - Application Sync

- Network users syncing to live & open ACT! db



Sync - Network Sync Service

□ Network Sync Service

- A Separate executable - runs as a Windows Service
- “Listens” automatically for incoming syncs
- Database may be open or closed, ACT! doesn’t have to be running
- Multiple databases are able to sync in parallel
- Data is encrypted 64-bit

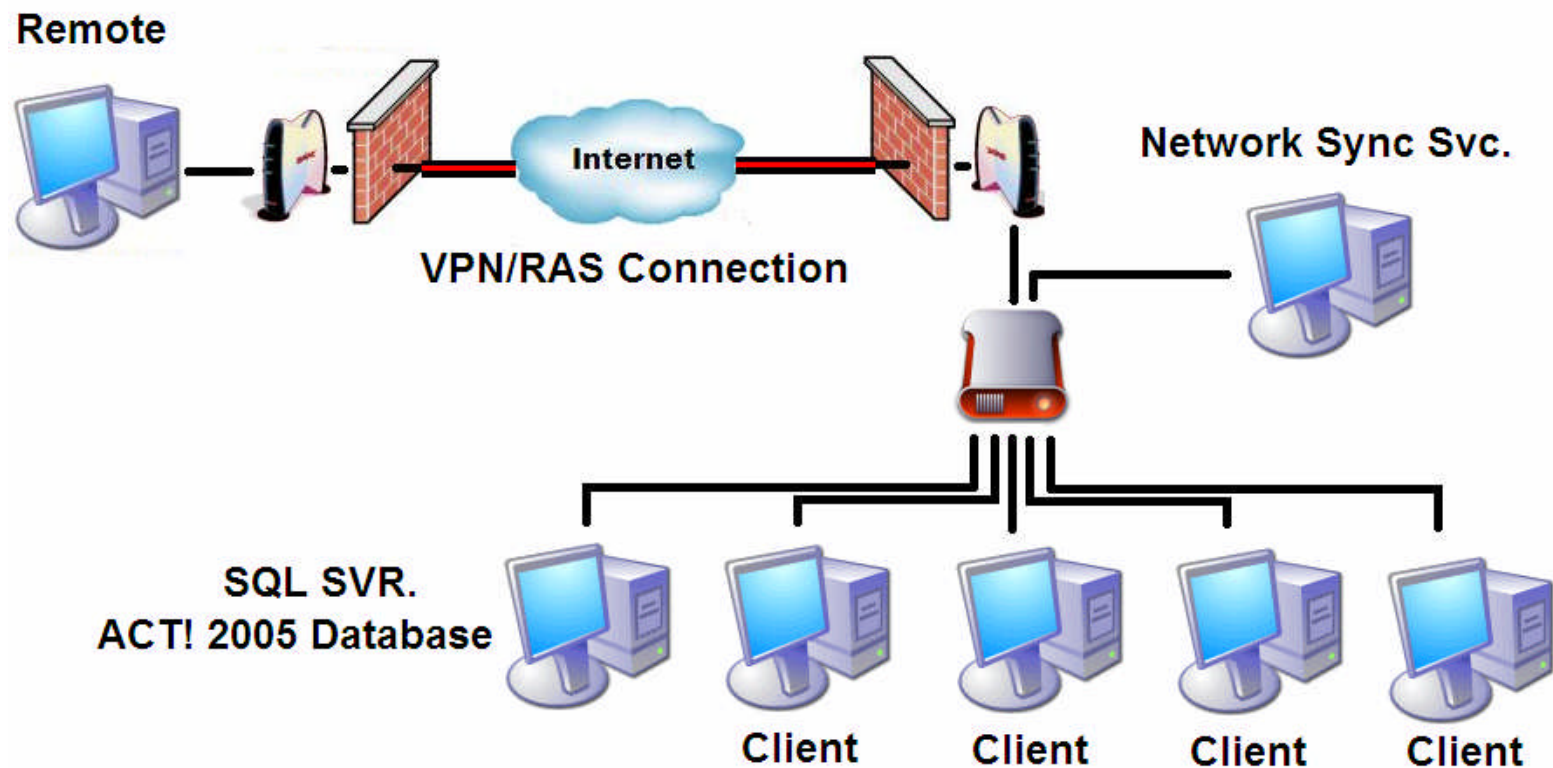
□ Downside

- Users have to have access to the LAN, WAN
- .NET required (server)
- VPN, RAS, Network connection required
- Folder permissions required



Sync - Network Sync Service

- Intranet to Network Sync Service to DB



Sync - Internet Sync

□ Internet Sync (Utilizes IIS Service)

- “Listens” automatically for incoming syncs
- Main database may be closed, ACT! doesn’t have to be running
- Multiple databases are able to sync in parallel
- Data is encrypted 64-bit

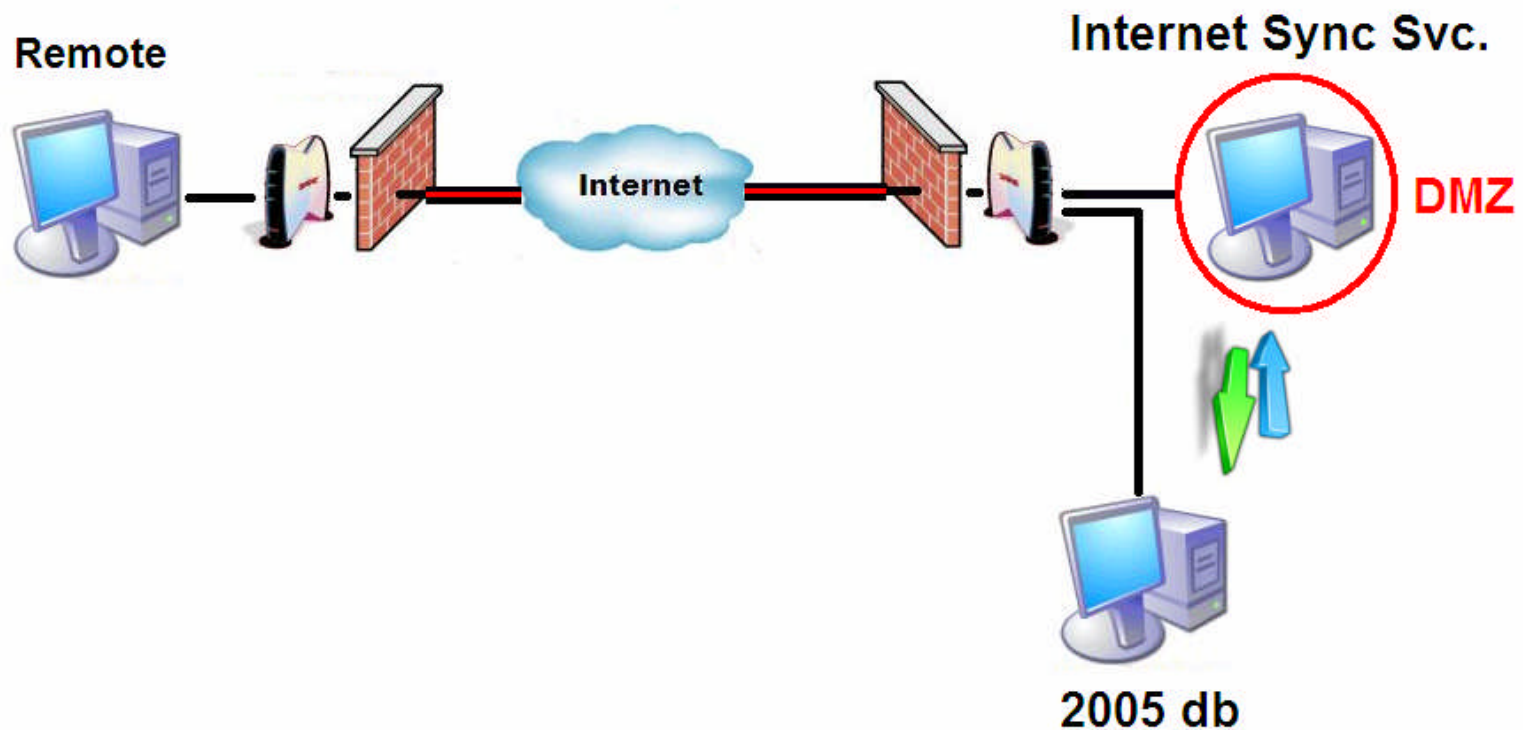
□ Downside

- Remotes have to have internet connection, http://
- IIS needs domain credentials for db location
- Can be difficult to configure based on IIS Server OS
- Folder permissions required - for attachment sync
- Port 80 access required, no SSL support



Sync - Internet Sync

- Internet to Internet Sync Service to DB



The “Sync Set”

- Defined by Administrator/Manager
 - Saved Queries - bases on **Contact Fields**
 - Includes **ALL Company and Group** records in db
 - Sync Set Includes...
 - All User records
 - Contact records meeting the criteria of the query
 - Includes records accessible by at least one of the intended remote users
 - Contact records individually added to Subscription List
 - History
 - Activities
 - Opportunities
 - Secondary contacts



The “Sync Set” – Optional Items

□ Database Supplemental Files

- Letter templates, report templates, layouts, and saved queries specifically “belonging” to the Main database

□ Attachments

- All files in the Attachments folder, regardless if you have access to the contact records or not
- Includes Document Tab items



The “Sync Set” – What’s not sync’d

- Personal Supplemental Files
 - Files stored in the traditional ‘Default Locations’ paths
 - Letter templates, report templates, layouts, etc which do not ‘belong’ to any specific database

- Settings and Preferences Stored Locally
 - Including settings for Navigation bars, Toolbars, Menus, and column customizations



Sync – Who can do what?

- Standard users and above can perform sync
- Admin/Managers
 - Modify sync set for remotes
 - Modify subscription list (add or remove)
 - Create, Recreate or Disable remote database
- Standard Users
 - Modify their own Subscription List (add or remove)
 - Modify their own Sync Schedule



Sync – “The secret”

- Sync based on 3 factors (in this order)
 - Contact Access/Limited Access
 - Subscription List
 - Sync Set (query)

- After creating remote user
 - Log into database as remote user, what can you see?
 - What you see is what can potentially be sync'd
 - Is it more data than what you anticipated?



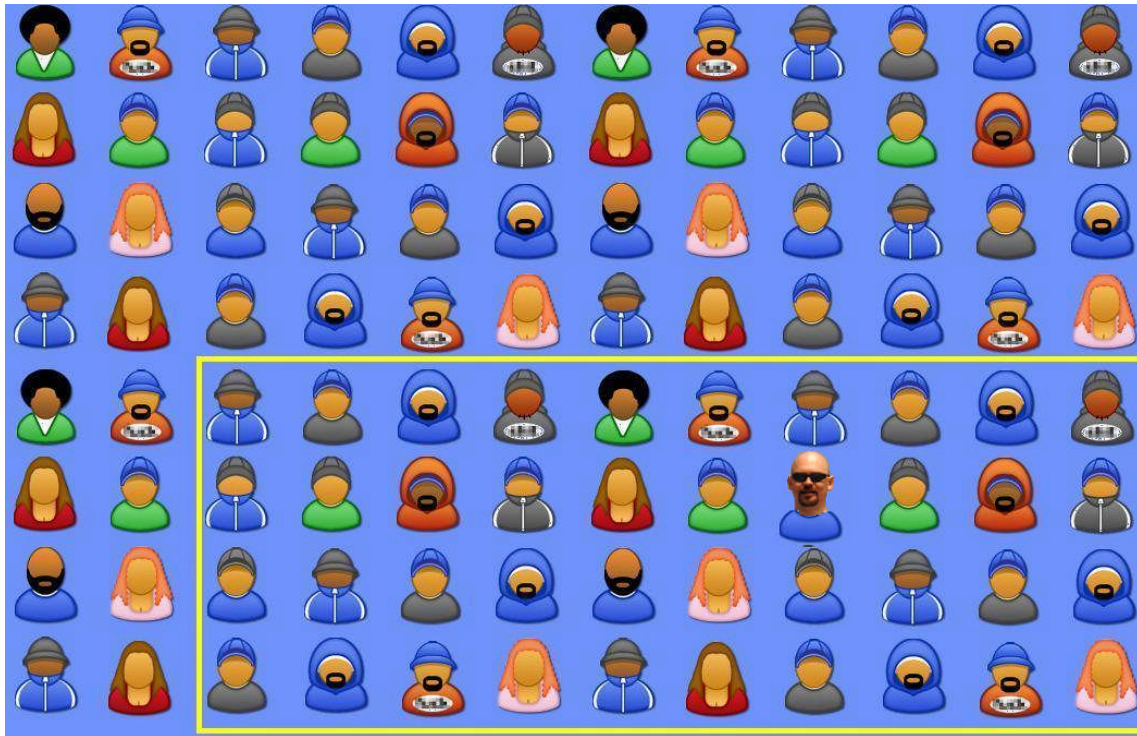
Sync – “The secret”

- Entire ACT! 2005 Database



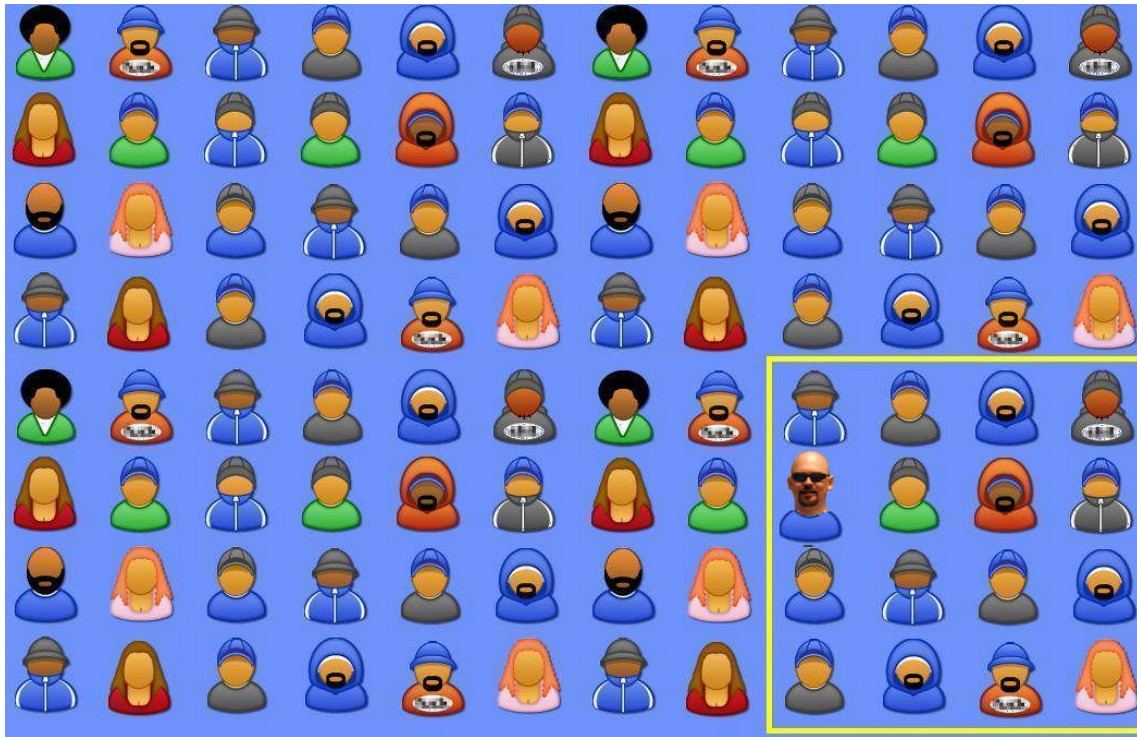
Sync – “The secret” – ACL

- Limited Access for user: Cliff Roberts



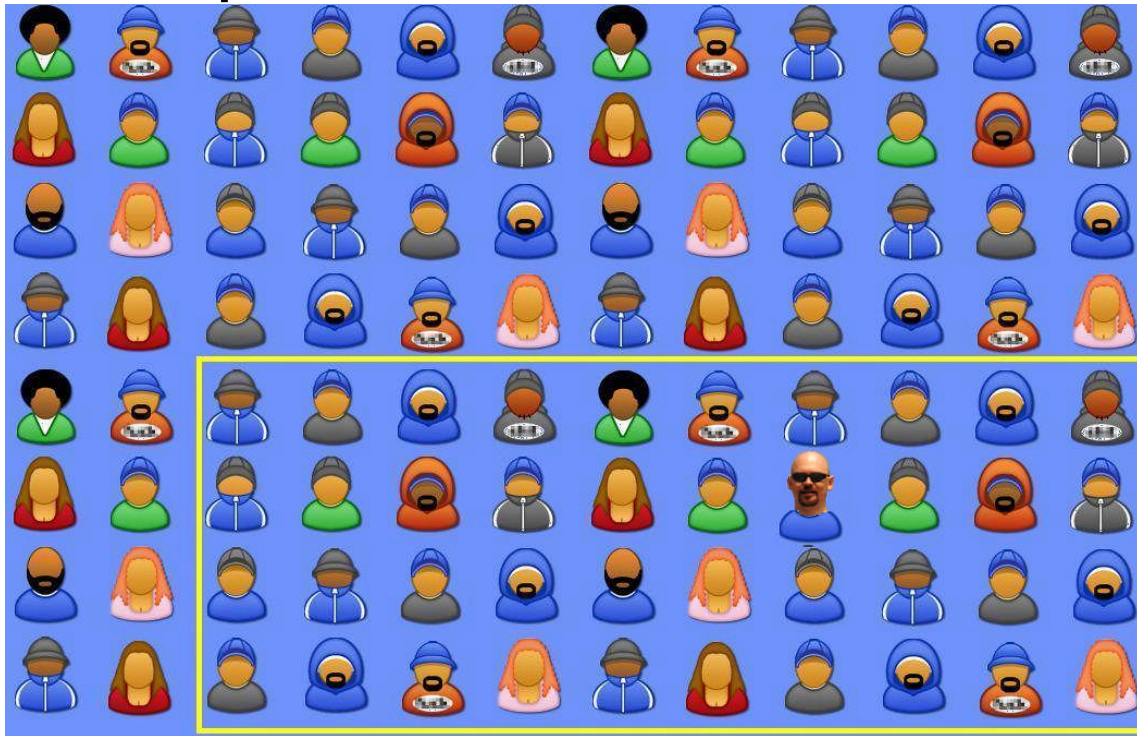
Sync – “The secret” - Query

- Sync Set (query) State = CA



Sync – “The secret” – Fishing

- ❑ Cliff can “Fish” from Subscription List for records
- ❑ Subscription List = Limited Access = Cliff Roberts



Sync – “The secret”

- The Steps to setup sync...



Sync – The Sync Set Query

- Query is based on **contact** fields.

Sync Set Criteria

File

Select Sync Set Criteria

Type: Contact Field Name: Operator: Value:

Add to list

(	Type	Field Name	Operator	Value	)	And/Or
	Contact	State	Not Equal To (!=)	OR		End

Move Up

Move Down

Remove

Remove All

Preview

Contact	Company	Phone	State
	CH Gourmet Gifts		
Ashley Allan	Tiny Town Productions	(480) 555-2451	AZ
Garcia Anderson	Searchlight Casting	(480) 555-3764	AZ
Thomas Andrews	Modern Electric Supply	(727) 555-4578	FL

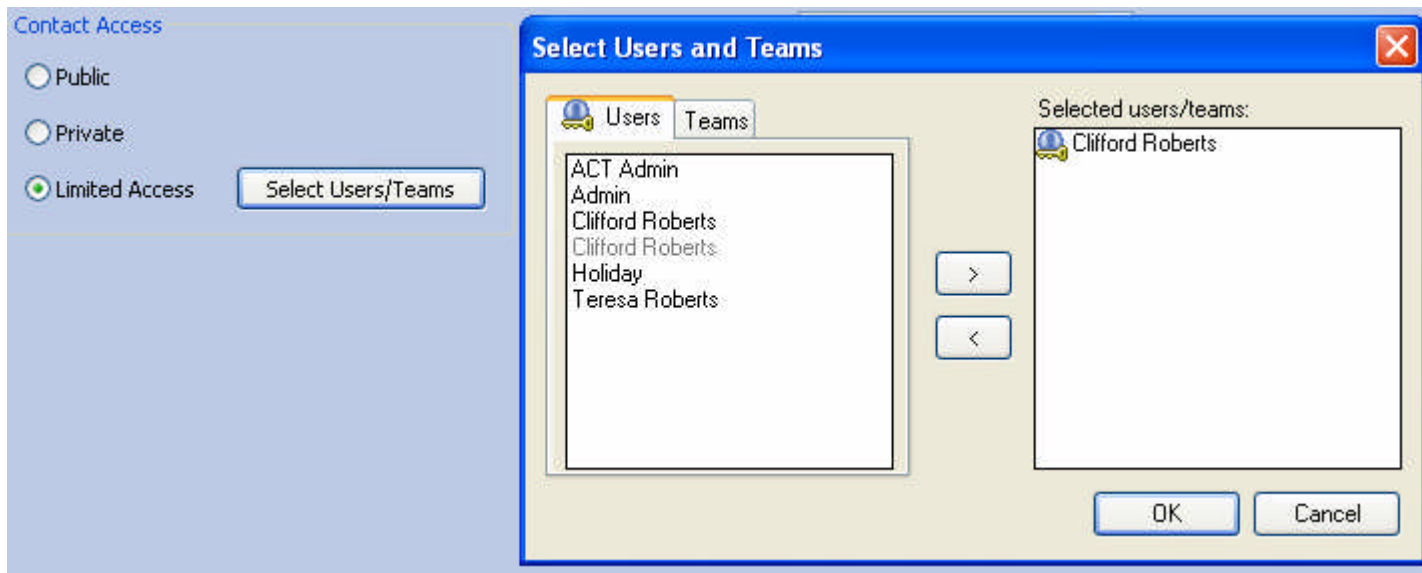
Total: 66

OK Cancel

005

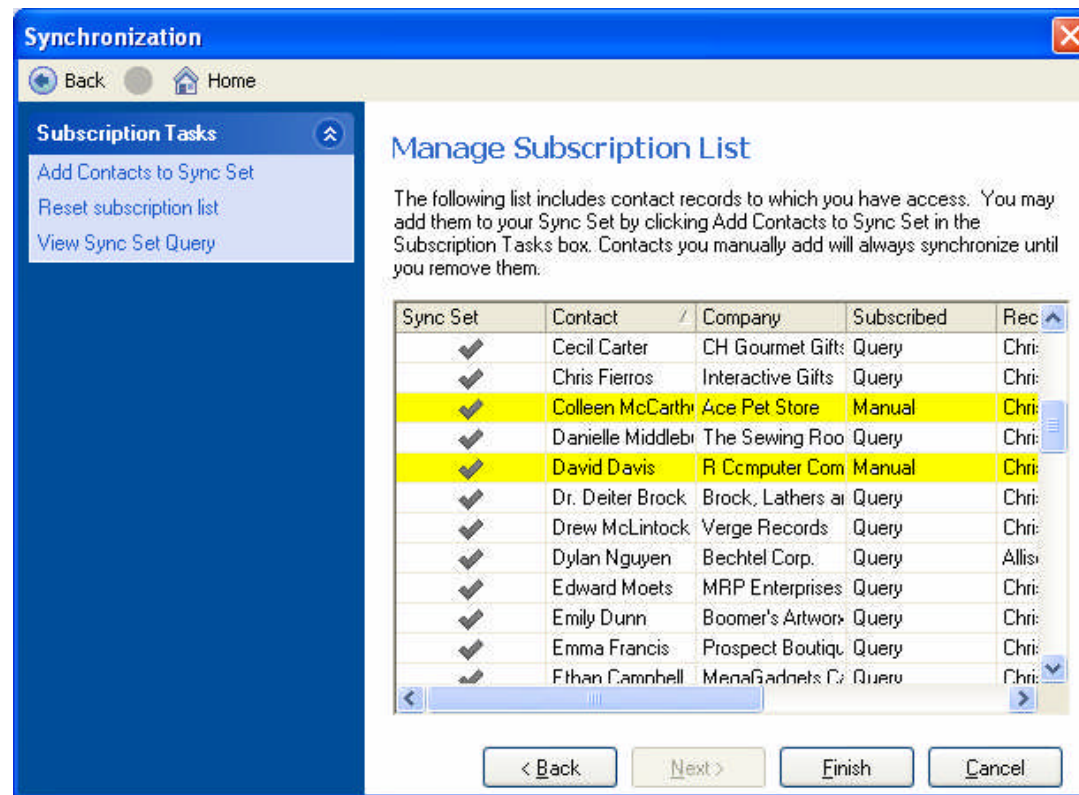
Sync – Contact Access - ACL

- Public & Limited Access – “Contact Info” Tab
 - Where do you set what your user has access to?



Sync – Subscription List

- Display/Select contacts inside/outside Sync Set



The screenshot shows a 'Synchronization' window with a 'Subscription Tasks' sidebar and a 'Manage Subscription List' main area. The sidebar includes options: 'Add Contacts to Sync Set', 'Reset subscription list', and 'View Sync Set Query'. The main area contains a table of contacts with columns for Sync Set, Contact, Company, Subscribed, and Rec. Two rows are highlighted in yellow: Colleen McCarthy (Ace Pet Store, Manual) and David Davis (R Ccomputer Com, Manual). At the bottom are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

Sync Set	Contact	Company	Subscribed	Rec
✓	Cecil Carter	CH Gourmet Gifts	Query	Chri
✓	Chris Fierros	Interactive Gifts	Query	Chri
✓	Colleen McCarthy	Ace Pet Store	Manual	Chri
✓	Danielle Middlebr	The Sewing Roo	Query	Chri
✓	David Davis	R Ccomputer Com	Manual	Chri
✓	Dr. Deiter Brock	Brock, Lathers ai	Query	Chri
✓	Drew McLintock	Verge Records	Query	Chri
✓	Dylan Nguyen	Bechtel Corp.	Query	Allis
✓	Edward Moets	MRP Enterprises	Query	Chri
✓	Emily Dunn	Boomer's Artwor	Query	Chri
✓	Emma Francis	Prospect Boutiq	Query	Chri
✓	Fihan Campbell	MenaGadnets C	Query	Chri

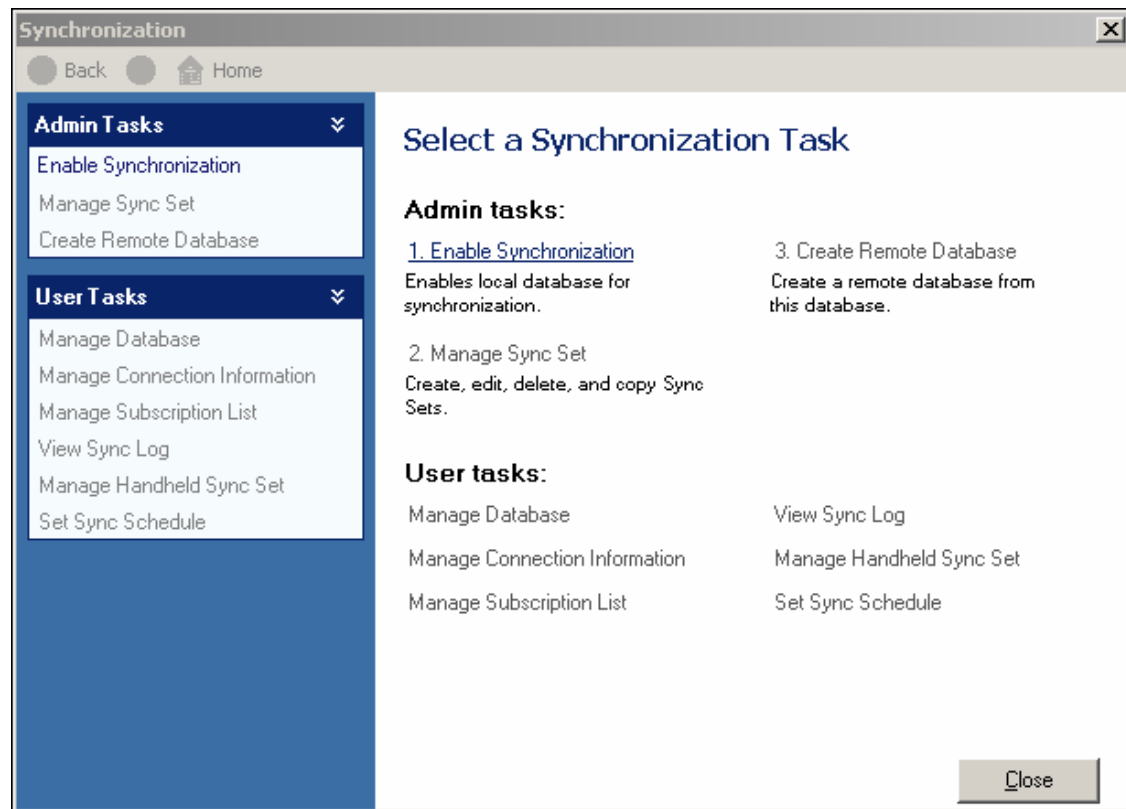
Sync – 3 Easy Steps?

1. Enable Synchronization
2. Mange Sync Set
3. Create Remote Database



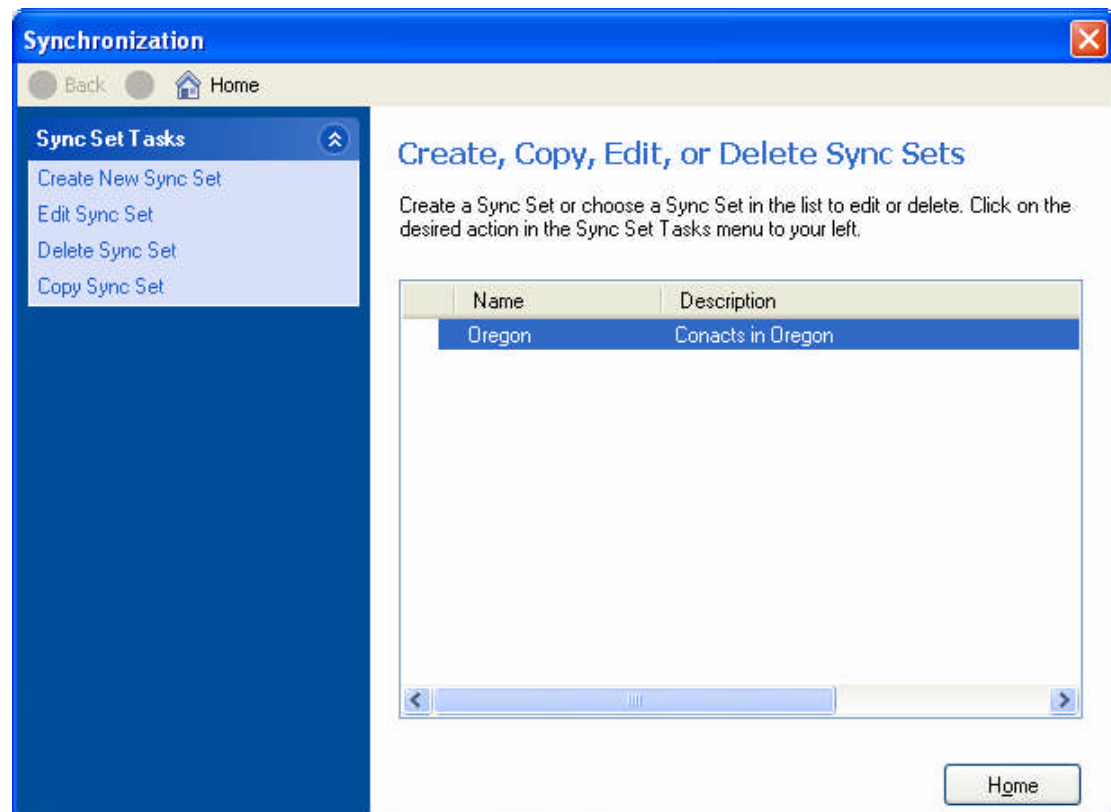
Sync – The Wizard

□ Enable Sync – Tools Synchronization Panel



Sync – Manage a Sync Set

□ Create a new Sync Set



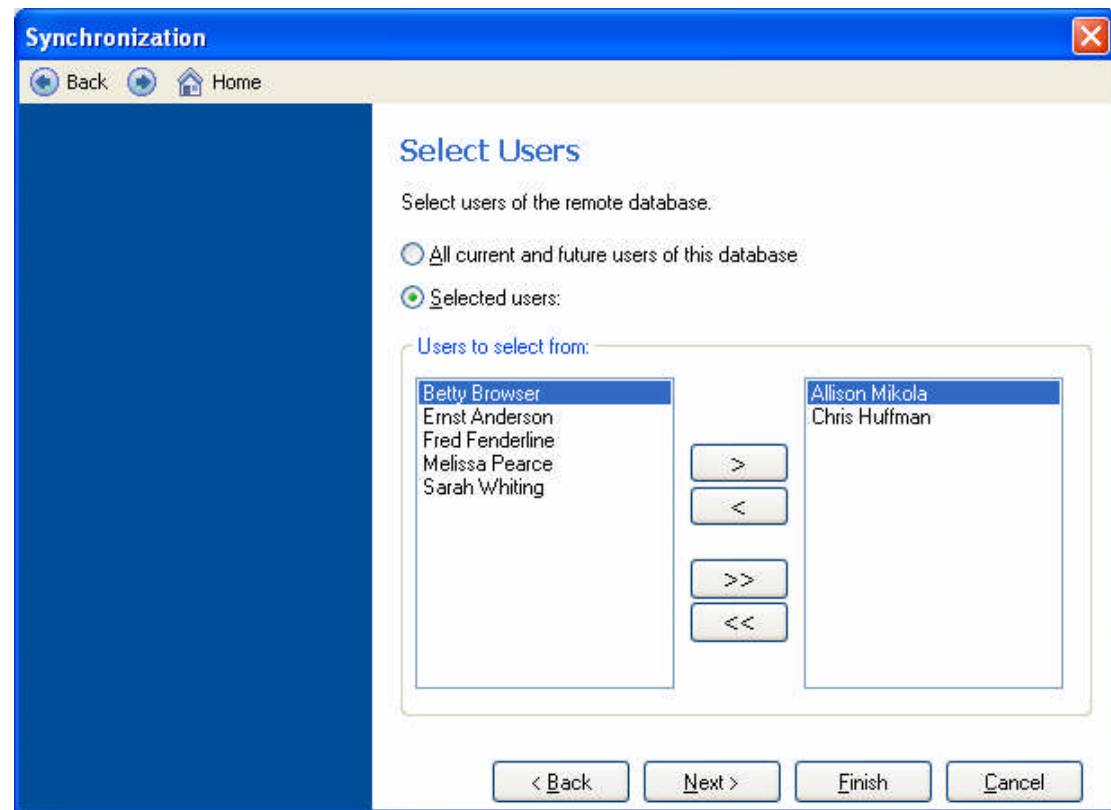
The screenshot shows a window titled "Synchronization" with a blue header and a close button (X) in the top right corner. Below the header are "Back" and "Home" navigation buttons. A "Sync Set Tasks" menu is open on the left, listing "Create New Sync Set", "Edit Sync Set", "Delete Sync Set", and "Copy Sync Set". The main content area is titled "Create, Copy, Edit, or Delete Sync Sets" and contains a table with the following data:

Name	Description
Oregon	Contacts in Oregon

Below the table is a scroll bar. At the bottom right of the window is a "Home" button.

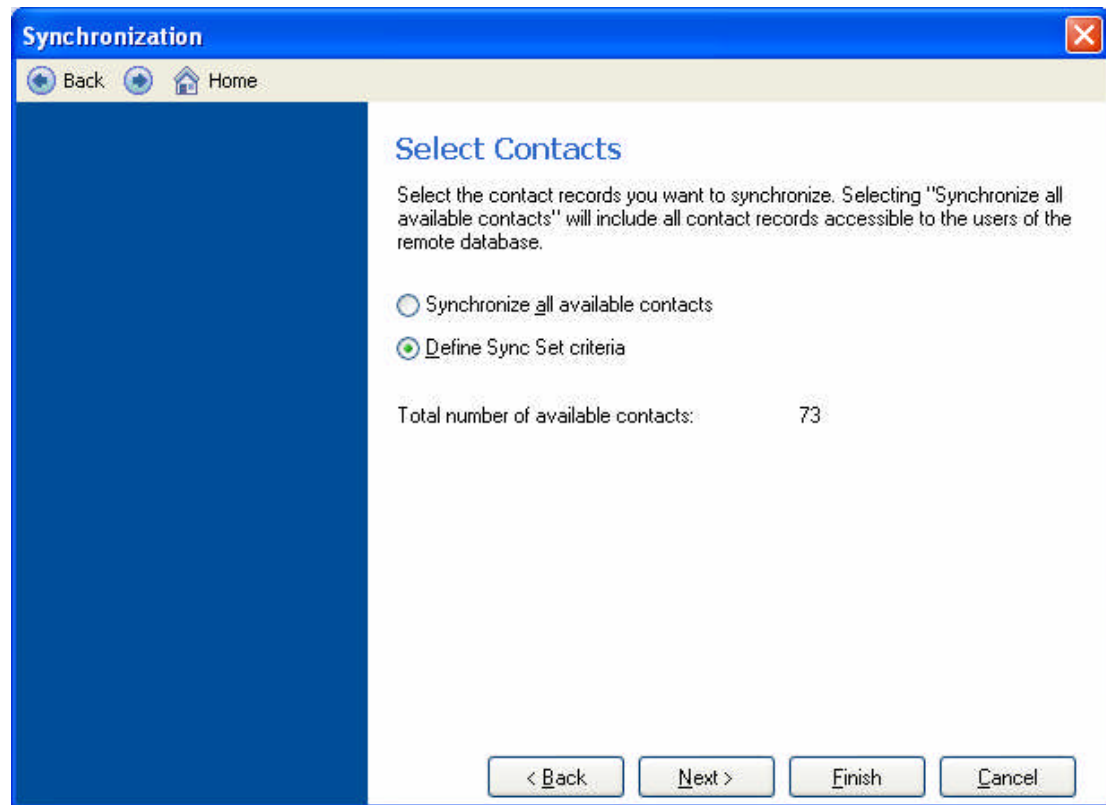
Sync – Select Sync Set - Users

- Select your users for the Sync Set



Sync – Send All Data or Query?

□ Summary of Sync Set and/or Build a Query



The screenshot shows a 'Synchronization' dialog box with a blue title bar and a navigation bar containing 'Back' and 'Home' buttons. The main content area is titled 'Select Contacts' and includes the following text: 'Select the contact records you want to synchronize. Selecting "Synchronize all available contacts" will include all contact records accessible to the users of the remote database.' Below this text are two radio button options: 'Synchronize all available contacts' (unselected) and 'Define Sync Set criteria' (selected). A status line indicates 'Total number of available contacts: 73'. At the bottom of the dialog are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Sync – Build Your Sync Query

- Create “Contact Field” Query – State = ?

File

Select Sync Set Criteria

Type: Contact Field Name: Operator: Value:

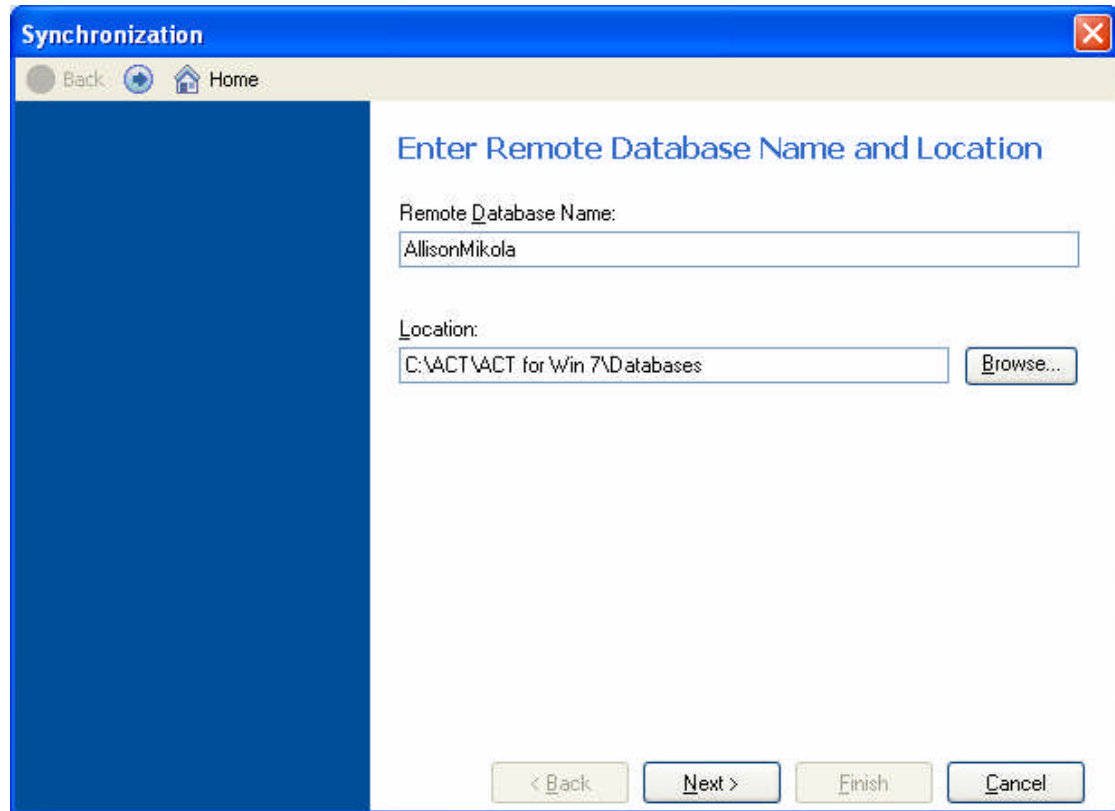
(	Type	Field Name	Operator	Value	)	And/Or
	Contact	State	Not Equal To (!=)	OR		End

Total: 0

Buttons: Add to list, Move Up, Move Down, Remove, Remove All, Preview, OK, Cancel

Sync – Remote db Creation

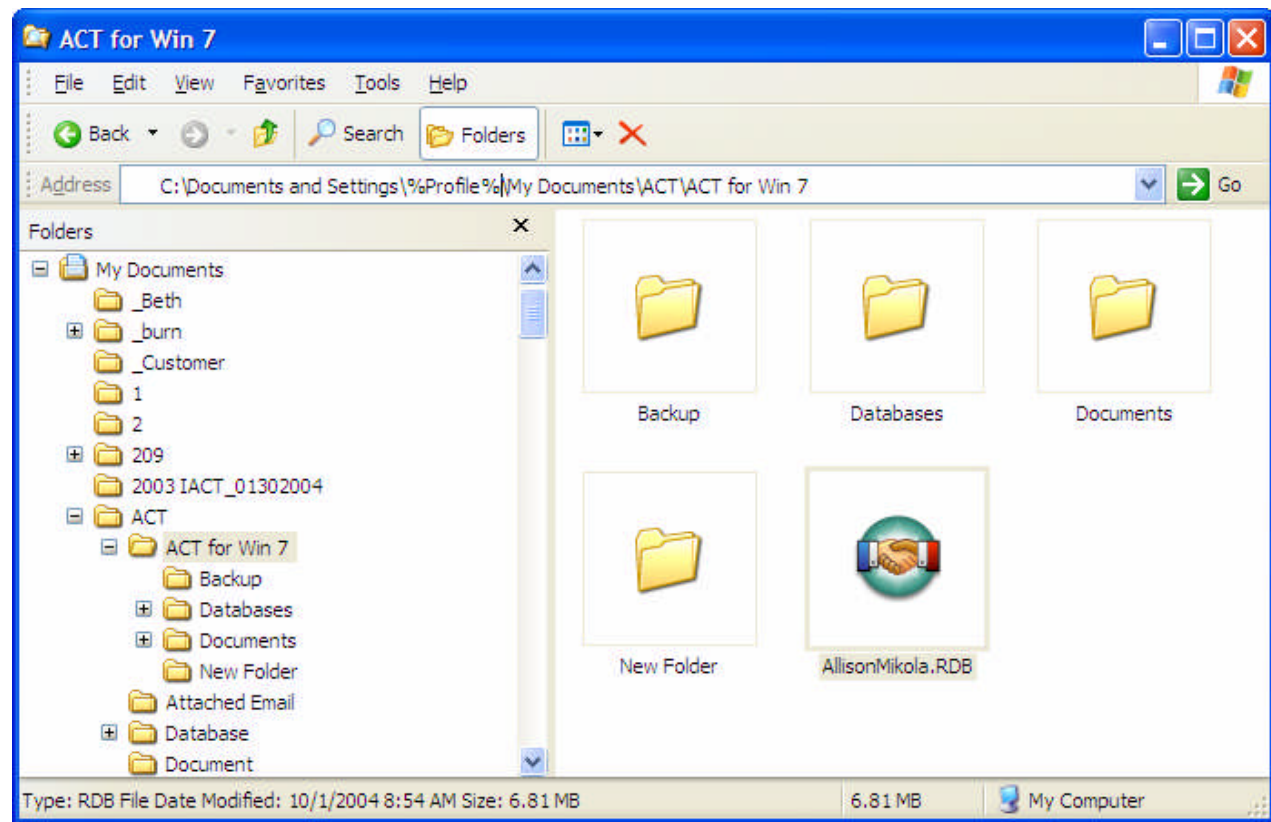
- Specify Remote Name & Location



The screenshot shows a 'Synchronization' dialog box with a blue title bar and a navigation pane on the left. The main area is titled 'Enter Remote Database Name and Location'. It contains two text input fields: 'Remote Database Name' with the value 'AllisonMikola' and 'Location' with the value 'C:\ACT\ACT for Win 7\Databases'. A 'Browse...' button is next to the location field. At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

Sync – The .RDB File

Remote Database – Deploy to Remote User



Sync – Remote user sync

- ❑ Remote users restore the Remote Database
- ❑ Sync settings are embedded in Remote from Parent
- ❑ Remote users configure nothing – just use ACT!
- ❑ Sync can be scheduled in remote
- ❑ Sync can be executed manually as well
- ❑ Only requirement is internet or LAN/VPN access
- ❑ Sync is self healing if connection is lost



Sync Summary

- ❑ One Parent Database
- ❑ Many children databases
- ❑ Children sync to Sync Service (network or internet)
- ❑ Sync Service forwards connection to SQL DB live
- ❑ Sync = Bi-directional data exchange of “Deltas”
- ❑ Sync is initiated from remote only!
- ❑ Remotes can expire – so they cant sync

Sync - Questions

- Please call or email me if you have additional questions.
- Clifford Roberts
- Clifford.Roberts@NextCRM.net
- 602-281-4491

