

Converting to Act! 2006?

Converting from an Act! version 3.x – 6.x (includes 2000 & 2004) to Act! version 8.x (2006) is not as simple as prior conversions. Version 7 (2005) was the first major re-write of the Act! Software code since Act for Windows (version 2.0) introduced in the early 1990's, Act! 2006 is written in Microsoft .Net for an SQL Database. Act! 2006 offers more power, scalability and features than previous versions. Prior to conversion, many questions need to be answered including but not limited to:

Which Act! 2006? Act! is now a multi-tiered product offering Act! by Sage 2006, Act! by Sage Premium for Work Groups 2006, Act! by Sage Premium for the Web 2006, and the first vertical market product, Act! by Sage Premium for Real Estate. Which is right for your company? Guessing wrong will cost time and money.

Hardware/Software specs – Act! 2006 is demanding of system resources. It will not run on some of the older systems currently running older versions of Act! Attention needs to be given to both the workstations and the server to ensure a smooth conversion.

For the first time Act offers not just Contact and Group records, but Contact, Group, and Company. How will your company benefit from the change and more importantly, how will you set them up?

Act! 2006 offers unlimited, Secondary Contacts with their own linked email addresses, that can be promoted to Contact status. How will your current Alternate Contacts convert?

Are you dependant on any Act 3rd party Add-Ons or Enhancements? Will they still work with Act! 2006?

Are there new Act Add-Ons or Enhancements that will help you accomplish more with your Act! data?

Do you have existing customization of layouts, reports, templates? Will they convert?

Do you use Groups or saved queries? Will they convert? Will they work the same way?

There are several new field types in Act! 2006; can you benefit from any of them?

Do you have remote users that currently synchronize with your master? Synchronization is drastically changed in Act! 2006.

Have you avoided synchronization to remotes users or your PDA because you could not get it to work with your current version? Synchronization is greatly improved in Act! 2006.

Have you avoided using Act! to track opportunities due to the limitations of this features in versions 5 & 6?

Do you have any corrupt data, illegal characters in fields, or duplicate data that keep your data from converting correctly?

Have you attempted to customize your database by renaming “un-needed” fields with less than satisfactory results?

Who will train your users to ensure they get the value out of the new software you expect?

These are only a few of the issues that must be resolved prior to conversion and some of the reasons that you may need the services of an Act! Certified Consultant

An Act! Certified Consultant (ACC) and Act! Premier Trainer (APT) from ActSource can help ensure a smooth conversion to Act! 2006. To arrange a no obligation meeting with an ACC call 952-226-5498 or send email to jfry@ActSource.com.