

Getting ACT! on your phone

A comparison of various PDA links for ACT! by Sage

By Mike Lazarus
ACT! Evangelist
GL Computing
Australia
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<http://www.glcomputing.com.au/>
<http://blog.glcomputing.com.au/>
<http://twitter.com/GLComputing>
<http://au.linkedin.com/in/glcomputing>

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A comparison of various PDA links for ACT! by Sage

Mobility has been one of the great driving forces behind the use of ACT!. From the ability to sync to laptops (originally supported with ACT! 2.0 for DOS) to PDAs (since the HP95LX version in 1992) and even Web versions, people have found the need to provide access to remote users and to staff on the road to be an essential aspect to their management of customer relationships and of their staff.

I previously described many of the options for remote access of ACT! by Sage in the post:

[Supporting Remote Users with ACT! by Sage](#)

With the high uptake of "smart phones", there are now a wide variety of options available depending on your needs and I thought it would be useful to take a look at these and compare them.

The contents of this document are the result of over 60 separate installs in various configurations over a two month period.

Disclosure: I have been using Handheld Contact (on both Blackberry and iPhone) since switching from CompanionLink nearly ten years ago. I also support Handheld Contact resellers and users in Asia Pacific. However, I shall endeavour to provide an accurate an un-biased analysis of all the products.

The products included in this evaluation:

- [Handheld Contact - Professional and Basic](#)
- [123 Synchronizer](#)
- [CompanionLink Professional and Doublelook Enterprise](#)
- [ACT! Mobile Live - new from Sage](#)
- [ACT!Link for Palm OS and Pocket PC - free with ACT!](#)

Testing environment

- ACT! by Sage Premium 12.1.181.0 + Hot Fix 1 English (Australia)
- Windows XP Professional SP3 (with all updates) on domain
- Office 2007 SP2 (with all updates)
- Exchange 2003 6.5 SP2 (with all updates)
- Blackberry Pearl 8100 with OS 4.5.0.102 via BES
- iPhone 3GS 32GB with OS 3.1.3 via Exchange OWA
- HTC Touch Duel with Windows Mobile 6 Professional via ActiveSync 4.5
- All regional settings set to Australia, Sydney

The areas I will be evaluating include:

- Supported ACT! versions
- Supported phone operating systems
- Method of sync
 - USB
 - Wireless
 - Via other software such as Outlook, Exchange, Google Apps
- What ACT! data is supported
 - Contact fields - including:
 - number of fields
 - data types and formatting
 - pull downs
 - field level security
 - Activities
 - linking to correct contacts (or multiple contacts)
 - clearing activities
 - viewing and scheduling for other users
 - custom activities
 - Notes / Histories
 - viewing
 - creating on the road (including from emails, phone calls and SMS)
 - linking to multiple contacts
 - Sales Opportunities - viewing and creating
 - International issues - date and phone number formats
- Other functions
- Administration
 - Ease of setup and implementation
 - Ability to control what each user has access to
 - Data reliability
 - Security
- Support issues

Supported ACT! versions

- Handheld Contact - Professional
 - ACT! 2005 (7.0) - ACT! 2010 (12.1).
 - Standard, Premium and Web
 - Supports Terminal Services and hosted environments
- Handheld Contact - Basic
 - ACT! 2007 (9.0) - ACT! 2010 (12.1).
 - Standard, Premium and Web
 - Supports Terminal Services and hosted environments
- 123 Synchronizer
 - ACT! 2007 (9.0) - ACT! 2010 (12.1)
 - Standard, Premium or Web
 - Server sync requires an Exchange server. Also requires Outlook installed on an ACT! server and a login with access to all user's Outlook profiles which can be a security risk. Exchange installations require that Mapi be configured in Exchange.
 - No support for hosted ACT! solutions as most hosts don't like Outlook or separate MAPI drivers on server
- CompanionLink or Doublelook
 - ACT! 4.0 - ACT! 2010 (12.1)
 - Standard or Premium only via CompanionLink
 - Web, Terminal Services or hosted solutions possible via Doublelook - but a user to be logged into the system, which is not advisable on a server
- ACT! Mobile Live
 - Only ACT! 2010 (12.1)
 - Standard or Premium only
 - No support for Web, Terminal Services or hosted solutions
- ACT!Link for Palm and Pocket PC - free with ACT!
 - ACT! 3.0 - ACT! 2010 (12.1)
 - Only ACT! Standard or Premium
 - No support for Web, Terminal Services or hosted solutions
 - Palm Desktop interface has issues with 64-bit systems and Windows 7

Supported Phone Operating Systems

- Handheld Contact - Professional
 - Blackberry (except Storm only supported with Basic Edition)
 - Windows Mobile Professional (Pocket PC or Palm Treo) - with Windows Mobile 5.0 and later
 - iPhone
- Handheld Contact - Basic
 - Blackberry (all models including Storm)
 - Windows Smartphone - with Windows Mobile 5.0 and later (Basic Edition only)
 - Windows Mobile Professional (Pocket PC or Palm Treo) - with Windows Mobile 5.0 and later
- 123 Synchronizer
 - Sync's via Outlook - so supports phones that sync to Outlook, Exchange or Google.
- CompanionLink or Doublelook
 - Blackberry
 - Windows Mobile
 - iPhone - wireless
 - PalmOS, PalmPre
 - Android
 - Other options via Outlook, Exchange or Google
- ACT! Mobile Live - from Sage
 - Only iPhone and Windows Mobile versions in beta at time of writing
 - Expected to support a wide variety of standard cell phones and smart phones via SyncML
- ACT!Link for Palm and Pocket PC
 - Varies according to ACT! version. For ACT! 2010:
Palm OS 3.5-5.4 with HotSync manager 3.5-4.1.0 or 7.0.2
Pocket PC 2000, 2002, 2003, 2005, 5.0, 6.0 with ActiveSync 3.5-4.5 or Device Centre 6.1
 - Palm not supported on Vista x64 or Windows 7 x32 or x64 due to lack of Palm hotsync support for these operating systems.

Method of Sync

Essentially there are three forms of sync:

1. Direct to the phone via USB
 2. Via a sync server on the internet
 3. Via some third-party product like Outlook, Exchange, Google, etc.
- Handheld Contact - Professional and Basic
 - Wireless only via HHC secure sync server
 - Console software can be installed on user machine or on server for central administration of multiple users - even with mix of different editions of HHC or phone types
 - Automated sync from PC and phone (automated on phone with Professional Edition only)
 - Basic syncs to standard phone apps, Professional uses its own application and database allowing for much more ACT!-like functionality than other products
 - 123 Synchronizer
 - Via Outlook then depends on how phone connects to Outlook/Exchange or via Google Outlook plugin.
 - Can automate sync with Outlook, but then needs additional server to sync wirelessly or automatically with phone like Exchange server (with BES for Blackberry), Google Outlook plugin or Handheld Contact for Outlook.
 - CompanionLink and Doublelook
 - USB or Wireless (optional subscription) for CompanionLink to phone
 - Via Exchange or direct to phone for Doublelook Enterprise
 - Wireless or via Outlook for iPhone
 - Via Google/Gmail for Android and others that sync to Google
 - Automatic option for wireless
 - Syncs only to standard phone apps (iPhone version uses separate app for activities)
 - ACT! Mobile Live
 - Wireless only via AML sync server
 - Requires local service installed on user's machine which must be left on to sync remotely
 - Automated sync from PC, manual from phone
 - Syncs only to standard phone apps (iPhone version doesn't support activities)
 - ACT!Link for Palm OS and Pocket PC
 - USB Cable via devices software (Hotsync or ActiveSync)
 - Requires each user to have local copy of ACT! to connect to
 - Unfortunately for Windows Mobile users, sometimes MS ActiveSync fails to recognise the device and a two-way sync will cause duplicates in ACT!. Therefore, this is only recommended for simple one-way send from ACT! set to overwrite data on the phone
 - Requires manual sync when user can connect to their PC
 - Syncs only to standard phone apps

What ACT! data is supported

- Handheld Contact Professional
 - Contacts and fields:
 - Up to 15,000 contacts on Windows Mobile, 3000 on other platforms
 - * The 3000 limit is being lifted in the next 1-2 months
 - Contacts with activities scheduled for the users are automatically added to the phone to ensure you have the necessary data.
 - 73 Fields - 23 standard and 50 customisable
 - Supports ACT! field types except for picture fields. Fields types are entered on the phone as they are in ACT! (Blackberry now, iPhone in next version)
 - Supports pull-downs for data integrity
 - Supports ACT! field security like preventing changes to Read Only fields
 - Activities
 - Because HHC Professional uses its own database, it can properly link activities to contacts in the database or even with multiple contacts using the same concepts as ACT! itself.
 - Cleared or modified activities correctly clear and create history linked to the correct contact (or multiple contacts)
 - Supports both the viewing and scheduling of activities for other ACT! users - administrator determines which users' activities are available on the phone
 - Supports all custom activities and treats them just like other ACT! activities
 - Notes / Histories
 - Notes and History can viewed on the phone except for attachments
 - They can be fully created on the phone, including items linked to multiple contacts
 - Emails and SMS created from HHC Pro are recorded and sync back to ACT! History
 - Sales Opportunities - Supports viewing Sales Ops via History
 - International issues - Properly supports international date formats and dialling rules, including roaming dialling by including the country code with all phone numbers and dropping leading zeros.
- Handheld Contact Basic
 - Contact fields:
 - Up to 15,000 contacts
 - Contacts with activities scheduled are automatically added to the phone
 - 32 Fields - Limited Mapping
 - Activities
 - Activities created in ACT! link to contacts, not those created on phone
 - Activities linked to multiple contacts show the Contacts on the phone
 - Custom activities show on the phone
 - Notes / Histories
 - HHC Basic does not support Notes/Histories
 - International issues - HHC Basic properly supports international date formats and dialling rules, including roaming dialling by including the country code with all phone numbers and dropping leading zeros. I did uncover an issue with international dates that HHC promise will be rectified quickly

- 123 Synchronizer
 - Contacts and fields:
 - Number of contacts is limited by the RAM on the phone
 - No limit to number of fields, but data entered manually in Contact Notes on phone
 - Field types are not formally supported.
 - Pull-downs are not available
 - Field security is not supported on the phone.
 - Group Synchronization allows for groups only to be synched with phone and advanced group options allows for 1-to-1 matching.
 - Allows multi-group synchronization to multiple Outlook/Exchange folders via custom users.
 - Activities
 - Activities show links to the contacts but Contacts only have partial links to activities via Outlook's native links (via the Activities tab in Outlook).
 - Cleared activities correctly clear and create history linked to the correct contact (or multiple contacts). Some modifications also sync correctly with ACT!, but relies on the user manually entering data correctly
 - Supports viewing activities for other ACT! users?
 - Creating new activities don't check for appropriate data to link to contacts in ACT!
 - Allows clearing of ACT! Activities and creation of contact history from phone via predetermined keyword.
 - Allows creation of contact notes from the activities.
 - Notes / Histories
 - Notes and History can viewed on the phone except for attachments
 - New Notes/history can be created on the phone, but requires manual data entry to be correct.
 - Emails, SMS and phone calls from phone do not automatically create History to sync back to ACT!
 - Sales Opportunities - Supports viewing and editing of Sales Ops via the phone task list
 - International issues - Can properly support international date formats and dialling rules. Can support including roaming dialling by including the country code with all phone numbers and dropping leading zeros but this is not the default and took a while to find.
 - Other.
 - Server Configuration allows for multiple ACT! Databases to be synched to multiple Outlook/Exchange folders from one location.
 - Custom user capability (server only) enables users to create unlimited synchronization filters and options.

- CompanionLink and Doublelook
 - Contacts and fields:
 - Number of contacts variable according to phone
 - Field numbers vary according to the phone and sync method.
 - Field types are not formally supported.
 - Additional fields get stored in the Notes section, which removes any chance for formatting, standards or data entry rules. User fields are just numbered with no indication to the user which ACT! field they belong to
 - Pull-downs are not available
 - Field security is not supported on the phone. While it doesn't update ACT!, there is no indication that it was tried and/or failed.
 - I found a range of ways with syncing both ways that will cause mass-duplication of contact records, both on the phone and in the ACT! database.
 - Activities
 - Activities show links to the contacts (although this gets messy if you try to change the links), but Contacts have no link to activities.
 - Cleared activities correctly clear and create history linked to the correct contact (or multiple contacts). Some modifications also sync correctly with ACT!, but relies on the user manually entering data correctly
 - Supports viewing activities for other ACT! users
 - Creating new activities don't check for appropriate data to link to contacts in ACT!
 - Notes / Histories
 - Notes and History can viewed on the phone except for attachments
 - New Notes/history can be created on the phone, but requires manual data entry to be correct.
 - Emails, SMS and phone calls from phone do not automatically create History to sync back to ACT!
 - Sales Opportunities - Supports viewing and editing of Sales Ops via the phone task list
 - International issues - Can properly support international date formats and dialling rules. Can support including roaming dialling by including the country code with all phone numbers and dropping leading zeros but this is not the default and took a while to find.

Note - During testing of this product the following issues were found:

- There were a number of ways we found that would cause mass-duplication within the ACT! database. This is a major issue and so I recommend using it only to sync in one direction (from ACT! to the phone) or, if you need to sync both ways, make sure you have regular and tested backups
- The lack of a service ability and the requirement to be logged for the wireless syncing or the DoubleLook sync to Exchange is a significant security risk and I don't recommend using any product in this way

- ACT! Mobile Live
 - Contacts and Fields
 - ACT! Mobile live is one of two products (along with Handheld Contact) to use a proper Windows service. Unfortunately it's a single user sync defeating much of the benefit.
 - Sage documentation has suggested keeping the number of contacts under 1000, making this the lowest number of all products tested. That being said, I was unable to get a successful sync with over 500 contacts several times. It is also by far the slowest product to sync and the portal itself is very slow.
 - There is no option to map fields or add custom fields and limits you to a basic set
 - No support for pull-downs
 - No support for ACT!'s field level security
 - When I used a smaller database in order to test basic functionality, I found it would create duplicates within the ACT! database in certain configurations
 - Activities
 - There is no activity support if using an iPhone
 - For those that support activities, they have a number of issues (see International below for some more)
 - Timeless activities become "full-day"
 - Notes / Histories
 - Says that it can send up to 20 Notes and 20 Histories (you can select the types).
 - It stores the Notes/Histories in the Contact Notes... sending so much data causes all sorts of errors on the phone.
 - Sales Opportunities - Not available
 - International issues
 - International dialling doesn't properly work
 - Portal doesn't support international date formats
 - Portal time calculations makes various errors, especially during changes in daylight savings

Note - During testing of this product the following issues were found:

- There were a number of ways we found that would cause duplication within the ACT! database.
- Linking of activities is very poor
- International support has problems, including for US users who might call overseas

- ACT! Link for Palm and PocketPC
 - Contacts and fields:
 - No contact limit (depending on the phone)
 - Basic fields with some mapping
 - Activities
 - Not linked to contacts
 - Notes / Histories

Note - During testing of this product the following issues were found:

- There were a number of ways we found that would cause mass-duplication within the ACT! database.
- Linking of activities is very poor
- International support is very poor
- Changes to ACT! read/only fields will still write the data to the field.

Conclusions

After doing far more testing than I had planned for this document, my recommendation for the best product is [Handheld Contact Professional](#) for the following reasons:

- It is by far the easiest and fastest product to setup and implement and it's just as easy for a single user setup on a local PC as for a 100+ user setup on a network using a computer dedicated to Handheld Contact
- It is the easiest product to administer and maintain without technical skills
- It provides the most "ACT!-like" experience on the phones it supports
- It is a fully integrated application with Contacts, Activities and Notes/Histories in the one interface
- Using its own application means that recording of emails, sms and call history can be automatically tracked and synced back to ACT!
- It is one of only three products I couldn't cause to duplicate data in the ACT! database - the others being Handheld Contact Basic and 123 Synchronizer
- It is one of only two products that operate using a Windows service, which I think is important for network security. The other being ACT! Mobile Live

* A useful point to note for the future: Handheld Contact is working to incorporate the full Sales Opportunity tables as well as those of [Accounts Master!](#) towards the end of this year. That will mean Handheld Contact Professional users will be able to view the sales history with their customers, but also to be able to create invoices from the road. Accounts Master! will integrate many accounting/ERP systems into ACT! and Handheld Contact.

Its only negatives are that it's limited to specific devices (Blackberry, iPhone, Windows Mobile Professional) and that the amount of data it requires means that on Blackberry there is a lower contact limit

My 2nd choice was, to be honest, a surprise to me. I hadn't played with [123 Synchronizer](#) before and was surprised how solid it appeared. If you are using devices that are not supported by Handheld Contact Professional or if your business wants their ACT! data to synchronise with Outlook/Exchange, then this is the way to go.

- It is the only product other than Handheld Contact where I didn't manage to cause to duplicate data in the ACT! database
- While it didn't run as a service, it does have the option to be called from a command line and run without requiring a user account to be logged into Windows.

The only negatives I found are that it can be quite complex to set up in some configurations - I recommend using an ACT! Consultant - but check that they have done implementations of this product first. Also that it relies on Outlook/Exchange and possibly another product if you want wireless - while this would suit most users, you should check this before selecting it.

If you are running ACT! versions prior to Sage or using a device not supported by Handheld Contact and also not using Outlook, then [Companionlink](#) is the choice. Doublelook really needs to have the option to run as a service to be really considered.

The free links should really be treated as a one-way option (from ACT! to the phone). The ability to cause problems in ACT! going both ways makes this a poor choice

Regarding [ACT! Mobile Live](#), having supported ACT! since 1987, it really pains me to say I would not advise users to consider this as a realistic option under any circumstances. It has been 20 months since Sage first publically announced the beta of this product. They would be doing a favour to their users and VARs if they either started from scratch or dropped it and purchased one of the other products.