



Microsoft Dynamics CRM, Sage ACT! and Goldmine Sage Comparison Guide

	Microsoft Dynamics CRM	Sage ACT!	FrontRange Goldmine
FUNCTIONAL OVERVIEW			
INTRODUCTION	<p>Microsoft Dynamics CRM is a full featured Relationship Management system accessible within Microsoft Outlook & works with familiar MS Office applications including Word & Excel for fast user adoption. Also accessible via web browser & mobile device.</p> <p>Includes dedicated sales, service / support & marketing automation tools.</p> <p>Fully flexible and can be tailored to meet most business requirements. This includes tracking multiple relationship structures and different entities besides people and companies.</p> <p>Suitable for any sized organization and especially those with multi-site implementations &/or businesses wanting to embed CRM with familiar Microsoft applications.</p> <p>Microsoft Dynamics CRM is an advanced product but can be used by beginners and advanced users alike.</p> <p>Can be deployed on-premise or hosted.</p>	<p>ACT! is the world's best selling CRM system. An entry-level solution yet offers many of the tools seen in advanced products.</p> <p>ACT! is available in 2 editions for small to medium sized organizations:</p> <p>ACT! 2009 (v11) – standard version supports between 1 – 10 users sharing the same database.</p> <p>ACT! Premium – greater scalability for 1-100 users. Includes ACT! Premium for Web software for dual access to ACT! through a Windows client installation &/or through a web browser.</p> <p>Also includes automated database administration / maintenance, improved calendar / scheduling facilities plus extended data security tools.</p> <p>ACT! is an easy to use, intuitive CRM system and is particularly well suited to first time users.</p>	<p>GoldMine Premium is a mid-market solution providing an extensive array of facilities and tools including indepth reporting capabilities and enables much greater control over user access.</p> <p>Designed for medium sized companies or departments within larger corporations.</p> <p>Includes powerful customer and sales management with wide integration capability and basic workflows.</p> <p>GoldMine is an advanced product which can exchange data with other internal data systems. GoldMine is best suited to competent computer users although customisation of the interface is possible for beginners.</p> <p>Compared with many rival systems, GoldMine Premium offers a flexible concurrent licensing model.</p>

KEY STRENGTHS	<ul style="list-style-type: none"> Includes sales, marketing & service automation tools Embedded within Microsoft Outlook, also accessible by web & mobile device A single source of customer data Interactive dashboards and reporting analytics Windows Workflows enforce consistency & automate tasks Back-office integration Scalability Adaptability and customization Multi-currency & multi-lingual 	<ul style="list-style-type: none"> Contact management Low cost of investment Ease of use Activity / calendar management Sales Tracking Mail / Email merging 	<ul style="list-style-type: none"> Contact management with sales force automation Integration capability Built-in reports, statistical analysis & Crystal reports Automated workflows Project management Concurrent licensing Customer service & support management Telemarketing call scripting
LAYOUT & EASE OF USE	<ul style="list-style-type: none"> Fully embedded within Outlook interface so there isn't a new interface for existing Outlook users to learn Web browser & mobile access also use the same Outlook style user interface Modular design enables the interface to be tailored for each user and team Change the terminology of the product (fields & menus) to reflect your business terms Fully interactive dashboards provide click-through analysis on CRM data 	<ul style="list-style-type: none"> The look and feel can be completely redesigned and features removed or hidden as required Each user has a personal contact record which is displayed upon starting ACT! Intuitive design of interface with separate screens for Contacts & Company records Customizable dashboard views provide graphical overview of activities and sales opportunities Fields options include drop down lists, image and memo fields plus yes / no tick boxes 	<ul style="list-style-type: none"> Of the 2 editions, the Corporate Edition has a more complex user interface. GoldMine Premium Edition offers a more modern look and feel. The applications are built in modules and each component can be enabled or disabled for all or some users. MyGoldMine provides a welcome page with basic dashboards including to-do lists, recent contacts and headline sales opportunities.
NETWORK	Available as an on-premise customer deployment or hosted	ACT! is multi-user enabled and network ready	All software is multi-user enabled and network ready
USERS	Typically 5-5000+ users	ACT! 2009: Maximum of 10 users ACT! Premium: 5-100+ users	Corporate / Premium Editions: Typically 1 – 250 users
CONTACT RECORDS	No upper limit of contacts	No defined limit but as rules of thumb: ACT! 2009: up to 30,000 contacts ACT! Premium: up to 100,000 contacts	No defined limit, but as a rules of thumb up to 500,000 contacts
MOBILE ACCESS	Web and wireless technology enable access from anywhere, including PDA's, mobile phones, internet cafés. Offline replication also available.	<ul style="list-style-type: none"> Built-in offline synchronization facility Remote live access via VPN connections ACT! Premium is supplied with Web software for ease of access sharing the same data 	<ul style="list-style-type: none"> Built-in GoldSync synchronization capability included Thin-client version available for web access
PDA INTEGRATION	Client Access License include mobile device access. Device CALs can be assigned to mobile device.	Includes Built-In 2-way synchronization to Palm OS and Pocket PC handheld devices	Built-in synchronization with Palm and Pocket PC devices

DATABASE SECURITY	Completely definable security profiling for individual users and teams.	<ul style="list-style-type: none"> 5 user security levels ACT! Premium provides extended control over access permissions to contact records and specific fields 	Advanced user-group security with configurable data access to record & field level
CONTACT/ COMPANY CENTERIC	Microsoft Dynamics CRM stores data at Company & Contact levels, but also has the ability to define any other record entities that you may require with all functionality cross-related.	Contact & Company centric structure capabilities. Contacts can be associated with company or divisional records.	Contact-centric structure with organizational structure capabilities and roll-up account reporting
MULTIPLE ADDRESSES	Unlimited multiple addresses	Unlimited secondary contacts per record with individual addresses. Company records can track divisional office addresses	Unlimited multiple contacts per records with individual addresses.
CALENDAR	<ul style="list-style-type: none"> Utilizes Outlook calendar and includes Microsoft Exchange integration Service scheduling tools enable key resources to be booked 	Outlook-style multi-user daily, weekly, monthly & customizable work week views. Personal calendars can be synchronized with Outlook.	Multi-user daily, weekly, monthly, yearly and peg-board views. Optional integration with Microsoft Outlook or Exchange Server.
MANAGING SALES	<ul style="list-style-type: none"> Fully customizable advanced Sales & Opportunity Manager with workflow processes to apply consistency, cut selling cycles and lower the cost of selling. Built-in on-line quotation generator and product catalogue. Quick sales campaign option available. Also links to marketing modules for Return on Investment analysis. Rich reporting & dashboard metrics including Excel export. Supports opportunity queuing 	<ul style="list-style-type: none"> Sales & Opportunity Manager supports configurable products, price lists and sales stages linked to probability. Graphical sales dashboards can be customized. Supports multi-product sales & user fields. Link opportunities with multiple contacts Opportunity list view can be filtered and sorted and exported to MS Excel with 1 click. 	<p>Advanced Sales & Opportunity Manager with configurable products, sales stages and user definable fields.</p> <p>Supports multi-product sales and ongoing billing, sales history and sales linked to multiple contacts.</p>
MANAGING MARKETING CAMPAIGNS	<ul style="list-style-type: none"> Includes full marketing suite with campaign management, advanced opt-in/out management, telemarketing and lead routing etc. Rich marketing reports, ROI analysis & integration Mail & HTML e-mail campaigns. 	Full mail-merge capabilities through Microsoft Word and HTML e-mail	Full mail-merge capabilities via Microsoft Word or HTML e-mail and campaign management for return-on-investment analysis.
REPORTS	<ul style="list-style-type: none"> Multiple built-in reports. Configurable dashboards with drill down analysis. Utilizes MS SQL analysis services for predictive analytics. Online analytical processing. MS Excel data export. MS SharePoint integration allows reports to be shared with external users. 	<ul style="list-style-type: none"> Around 40 customizable preconfigured reports, with powerful built-in report writer, supporting graphs, scripting etc. Activity and Sales Opportunity dashboard reporting. Optional Crystal Reports compatibility available. 	Comprehensive array of customizable pre-configured reports plus an option to run templates created using Crystal Reports.

CUSTOMER SERVICE SUPPORT	<ul style="list-style-type: none"> Provides a complete contact history view from a single interface. Full built-in case management with escalation, SLA monitoring, Knowledge Base and self service. Supports case queuing 	Provides a complete view of the contact communications history, scheduled activities, and sales opportunities.	<ul style="list-style-type: none"> Complete contact history view. Corporate Edition can be integrated with FrontRange HEAT Service & Support software. Premium Edition includes dedicated case management for service support.
ATTACHING FILES	<ul style="list-style-type: none"> Full file attachment facility. Integrates with MS SharePoint Server to store & share documents. 	Full file-attachment and remote user synchronization facilities. Document short-cuts can also be added.	Full file-attachment and remote user synchronization facilities.
ACTIVITY TYPES	Fully customizable activity types with user definable fields etc. Activities can be linked to contacts, companies & any other entities defined.	Scheduling for telephone calls, meetings, to-do's, and events or define bespoke custom activity types.	Scheduling for telephone calls, next action, meetings, to-do's, events and literature requests.
SEARCHING/ GROUPING CONTACTS	<ul style="list-style-type: none"> Perform easy searches for locating & retrieving records. Full list management & query building capabilities. 	<ul style="list-style-type: none"> Right click on any field to run a quick look-up search and refine the search with additional criteria. Perform queries using multiple criteria, edit and preview results before running the query. Store contacts in groups and apply membership rules for automated group management. 	<ul style="list-style-type: none"> Easy double-click search on commonly used fields. Advanced Queries are more complex to configure than ACT! but can be easily activated. Dynamic contact filters and basic contact groupings.
TELE-MARKETING SUPPORT	Call campaign functionality including call queuing, call allocation, call outcome status and escalation.	Schedule call campaigns against a group of contacts.	Schedule a call campaign against a group of contacts and use built-in telemarketing scripts with branching logic controls.
AUTOMATED PROCESSES	Windows Workflows can be linked with virtually any part of Microsoft CRM. On-screen displays clearly show the next logical stage(s) in the workflow to enforce consistency and to reduce processing time.	Activity series allows easy scheduling of a series of tasks for multiple users around an anchor date.	Full multi-user workflow capabilities with triggered events to automate repetitive tasks, set up internal procedures, produce automated emails & documents
MS WORD INTEGRATION	Native integration with Microsoft Word.	Create formatted templates using MS Word and personalize with contact detail. (ACT! Premium for Web restricted to ACT! Word Proc. integration only).	Create formatted templates using Microsoft Word and personalize with contact detail.
MS EXCEL INTEGRATION	Native integration with Microsoft Excel enabling lists and reports to be output for detailed analysis in Excel.	Single click outputs to Excel from most list views with automatic formatting & pivot table creation.	Direct outputs to Excel from most list views.
INTERNET CONNECTIVITY	<ul style="list-style-type: none"> Fully accessible via web browser or mobile device Supports offline access with sync updates 	Create hot-links to client websites. Launch web-pages based on current record info (e.g. map views, weather reports).	Hot-links to client websites. Launch web -pages based on current record info (eg map views, weather reports), and display web pages within GoldMine.

E-MAIL CAPABILITIES	<ul style="list-style-type: none"> Designed to work with any POP3/SMTP e-mail server Can send one-off or bulk e-mails & HTML graphical email templates Works with Windows Messaging 	<ul style="list-style-type: none"> Designed to work with existing email client software, or direct connection with POP3/SMTP server Can send one-off or bulk e-mails & HTML graphical email templates 	<ul style="list-style-type: none"> Designed to work as own e-mail system although can work with existing e-mail client software or direct connection with POP3/SMTP server Send one-off or bulk e-mails & HTML graphical email templates
MICROSOFT OUTLOOK INTEGRATION	Microsoft Outlook CRM is fully embedded within Outlook so all email communications are automatically captured	<ul style="list-style-type: none"> Send emails from ACT! via Outlook to keep a copy in sent items and apply to the ACT! contact history File Outlook emails in ACT! automatically using Outlook Rules or attach en masse. Create new ACT! records from emails received Schedule ACT! activities from Outlook 	Built-in Outlook integration connecting Goldmine and Outlook for a complete email history
MICROSOFT EXCHANGE INTEGRATION	Fully native integration with Microsoft Exchange	Can send/receive e-mails through Microsoft Exchange	Extended Integration Services available to connect Exchange Server and GoldMine Server for 2-way calendar synchronization between GoldMine and Exchange users
LOTUS NOTES INTEGRATION	Available with configuration or add-on utility	Compatible with Lotus Notes 6.5 email	Can be configured to send e-mails but by-passes Lotus Notes desktop. Third party calendar integration options available.
DATABASE CUSTOMIZATION	<ul style="list-style-type: none"> Look and feel of Microsoft CRM is fixed, however, the entire structure of the product can be tailored to meet requirements Ability to insert web-feeds into screens, display report data etc 	<ul style="list-style-type: none"> Fully customizable screen-template interface Update colors, fonts and business logo's Customizable document and report templates 	Configurable screen-template interface, with basic modifications. Customize document & report templates. Customizable Record Types allows separate field profiles to be configured for each type of contact. (e.g. prospects, customers, suppliers etc.) Premium Edition offers extra screen layout flexibility.
DATA TRANSFER	<p>Users can import data from Excel.</p> <p>Data conversions are undertaken using the underlying database administration tools.</p> <p>Comprehensive cleansing, de-duplication & filtering tools.</p>	Supports data import from MS Outlook, text delimited, CSV and dbf data files.	Data import from Outlook, text delimited, dbf and xml data.
FIELD DEFINITION OPTIONS	Capacity to customize & add fields to virtually every part of the product	<ul style="list-style-type: none"> Flat-file structure. Add relational tables by programming. Unlimited user-definable contact fields including text, numeric, date, tick-boxes & image fields. Virtual Basic Script support for conditional updating. 	Flat-file field structure with predefined relational data elements and up to 233 user-definable contact data fields including text, numeric & date. Scripting support for conditional updating.
WEBSITE INTEGRATION	Web Self-Service facility allows capture of new leads & enquiries plus enables client to log-in, update their records, make service requests & see case statuses.	Additional software available to capture new leads and enquiries.	Built-in web-import facility for capturing new leads & repeat enquiries.

TELEPHONY INTEGRATION	Optional CTI integration can be applied for inbound & outbound telephony automation, including pop-up functionality for inbound calls, forwarding of calls to other users and fast autodialing.	Limited inbuilt integration with some UK TAPI compliant systems.	Limited inbuilt integration with some UK TAPI compliant systems. Optional integration software available for most UK digital phone systems.
ACCOUNTING INTEGRATION	Integrate with other applications in the Microsoft Dynamics suite. Can be configured to integrate with Sage Accounting software.	Includes integration links with Sage Instant Accounts and Sage 50 Accounts.	Optional integration with Sage 50 Accounts and Sage 200.
INTEGRATION WITH OTHER DATABASE APPLICATIONS	<ul style="list-style-type: none"> Built-in integration with MS SharePoint, SQL Reporting Services & other Microsoft technologies. Virtually any database type can be read live into Microsoft CRM for displaying external data on screen, plus use with query builder, report writer etc. Dynamically exchange data with most other systems through programming. 	<p>Through programming it is possible to link ACT! with external ODBC databases.</p> <p>Inaport, an optional add-on application can undertake overnight batch data import/export & update of existing records.</p>	<p>Optional modules allow GoldMine to batch import and export to/from other systems.</p> <p>Views can be created to display live data feeds from other systems.</p>
PROGRAMMING OPTIONS	Using ASP .NET development techniques, the possibilities for integrating & developing with Microsoft CRM are infinite.	.NET application enabling development of plug-in modules, modification of table structure and Virtual Basic scripting in field definitions & report templates	Software Development Kit available. INI scripting support for field updating & control.
DATABASE ENGINE	No database engine included. Requires Microsoft SQL Server.	<p>ACT! 2009 – Microsoft SQL 2005 Express</p> <p>ACT! Premium - Microsoft SQL 2005 Express. Can connect with SQL Standard if CAL already held.</p> <p>Alternatively, ACT! Premium ST edition includes SQL Std & SQL Express.</p>	<p>MS-SQL (open database)</p> <p>All SQL server & client access licenses included</p>
ON-SCREEN USER HELP	<ul style="list-style-type: none"> On-screen help. Online CRM resource centre includes training videos, tips & blogs for shared best practice and advice 	Application help available from Help Menu.	Application help available from Help Menu.
SYSTEM REQUIREMENTS	Windows Server 2003/2008, IIS 6.0 or 7.0, 2GB RAM or higher, 10/100Mbps network card	Windows Vista, XP, Windows Server 2003/2008 with recommended 1GB RAM and 1GB hard disk space.	<p>Premium: Windows Vista or XP with recommended 1GB RAM and 150MB hard disk space available.</p> <p>Corporate: Windows 2000 or XP with recommended 256MB and 150MB hard disk space available.</p>
LICENSE STRUCTURE	Client Access, Device Access, Limited Access licenses and external connectors are available. Separate server license is required.	Licensed on a strictly named user basis.	Concurrent licensing for network users with dedicated licenses for remote users.