Case Study
Of
ACT! By Sage

About the Client

Our client based in New York, USA, the company is pioneered *Keep It Simple – Make it Smart* ™ this concept by creating custom solution and add-ons (plug-ins) to existing programs that took advantage of leading-edge technology and meet the unique requirements of their clients.

The company offers a wide range of services and proprietary products while representing some of the best brand names on the market today.

The company mainly dealing an ACT product (The company add-on's are designed to increase the power of ACT! through automation of simple and complex tasks while maintaining optimum user-friendliness.)

Now, the Company collaborates with MetaOption to work on ACT! Add-ons Technology. Basically ACT! is a SAGE product. Sage India offers a range of end to end business management solutions, including Sage Accpac ERP, ACT! By Sage, Sage CRM and Sage SalesLogix etc.

Requirement

To incorporate custom control functions within ACT 2008 framework (10.0v) for managing prospect/investor relationships with fund Managers. We have to create a (ACT) "Company" based system that is enabling the tracking of both Managers and Institutional investors from a corporate entity level. The information is filtering down to the associated ACT contacts of these Company entities. A
key feature to be developed the advent of the "Fund" records. On the Database level, "Fund" is storing in their own table. These allow fund records to be flexible associated to both the Money Managers and the investors/clients who are associated with them. There are also some dynamic reports views that can be easily exported to Excel sheet.

Our Solution

Features Included

The ACT database storing following records:

- Clients: Both an ACT Company records and Contact records
- Investor: Both an ACT Company records and Contact records
- Money Managers: Both an ACT Company records and Contact records

Note: The ACT Contact and Company tables are generic (off the shelf) tables – we are not developing these tables for them. We have a couple custom attributes that we are creating within an ACT UI.

The lists of ACT Custom Entities are:

1. TblForcasting
2. TblManagerMarketing
3. TblFundMarketing
4. TblFundDetails
5. TbleFundRelationship
6. TblTransactionDetails
7. TblNewsletterRelationships

MetaOption provided solution with flowing features:

Act! By Sage software plug-ins that we have integrated with ACT! Existing program to track/create funds and the Prospect/Investor and relationship with them.

There are 6 key custom tables plus associated grid view & dialog view. The grid views are master view of ACT! Added plug-ins part, in which case they are linked to an icon on the left navigation bar and embedded into the full ACT application screen like any other ACT view.

Other parts where integrated of Contact/Company Tab views, in which case they are appear on the lower tab of contact/company screen and they are dynamically filtered to the current contact/company as the user navigates from one record to next in ACT record.

The Master views

Following view are developed by MetaOption are:
Investor Tab: There is one screen with 4 tabs and
Fund Tab: There is one screen showing Funds.

Statistics

The complete ACT! Add-ons are consisting in 5 separate modules

1. Fund (To ability to create new Fund, edit & delete)
2. Forecasting (To ability to create new Forecasting, edit & delete)
3. Marketing (To ability to create new Marketing, edit & delete)
4. Transaction (To ability to create new Transaction, edit & delete) and
5. Investment summary (To ability to view as summary of fund, manager & investor wise total transaction amount).

Architecture – Technology

- VB.Net 2005, ACT Database
- COM + Interoperability
- 3-tier architecture
- Operating system windows XP and latter version

Third party tools are used

- KryptonToolkit 2.8.5
- DX Toolkit 8.2.2

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