CASE STUDY
ACT! Plug-in

The Client

New York based company, Sage, represents some of the best brand names on the market today. Sage offers a wide range of proprietary products and services, including *Keep It Simple – Make it Smart* ™. This concept leverages leading edge technology to customize business solutions by creating add-ons (or plug-ins) that enhance the power of existing programs, such as ACT!

The Challenge

Sage needed custom control functions incorporated within the ACT! 2008 framework (10.0v) that could be easily utilized by corporate entities to track funds, as well as relationships between prospects/investors and fund managers.

Solutions

We created a user-friendly plug-in with a practical interface. Information filters down to the associated ACT contacts of the company entities. A key feature includes the advent of the "Fund" records. On the Database level, "Fund" stores in its own table. This allows fund records to be flexible between money managers and associated investors/clients. There are also some dynamic report views that can be easily exported to Excel.

There are six key custom tables with associated grid and dialog views. The grid view is the master view, which includes an investor and fund tab

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.

We also created a contact/company tab view, in which case they 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.

Features Included

ACT database storage: (store the following records

- Clients—ACT company and contact records
- Investors—ACT company and contact records
- Money Managers: Both an ACT Company records and Contact records

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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.

ACT custom entities include:

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

Statistics

The complete ACT! Add-ons consist of 5 separate modules.

- Fund
- Forecasting
- Marketing
- Transaction
- Investment Summary

Architecture

Technology

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

Third Party Tools

- KryptonToolkit 2.8.5
- DX Toolkit 8.2.2

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