

ACT!

by Sage



Using ACT! by Sage Premium for Workgroups 2007 (9.0)

in Microsoft® Terminal Server
or Citrix® MetaFrame® environments

sage
software

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Abstract

This White Paper focuses on the use of ACT! by Sage Premium for Workgroups 2007 (9.0) in a Microsoft® Terminal Server or Citrix® MetaFrame® environment. Please note that Citrix compatibility is available in both ACT! and ACT! Premium for Workgroups (EX or ST Editions). Set up for each is very similar and differs primarily around the feature set differences between the ACT! and ACT! Premium for Workgroups products. For the purpose of this White Paper we are using ACT! Premium for Workgroups as the example and when ACT! is used for brevity, it refers to ACT! Premium for Workgroups.

The paper explores the benefits of deploying ACT! Premium for Workgroups through Terminal Services, outlines deployment requirements and recommendations, and provides installation and performance tips. It is intended for IT Administrators who are considering deployment of ACT! using Microsoft Terminal Services, with or without Citrix.

This paper is designed to answer the question, "Does ACT! run on Citrix?" The answer is an emphatic YES, when properly installed, configured and deployed on servers with sufficient resources. With very few exceptions, the features of ACT! Premium for Workgroups are available on Citrix.

Features not supported: Integration with a fax is supported via normal fax integration on Windows® 2000 and 2003 (i.e., the fax looks like a printer). Integration with an automatic dialer is not supported.

Introduction

ACT! Premium for Workgroups is a robust, feature-rich solution that provides centralized contact and customer management. Powerful features include: fast access to all relevant notes, history, activities and opportunities associated for individual contacts, groups and companies. Additionally, ACT! integrates with and adds value to tools used every day such as Microsoft Office.

Many companies with remote employees use Terminal Services/Citrix to deploy applications and desire that ACT! be deployed in the same manner. By implementing ACT! centrally on one or more Microsoft Terminal Servers with Citrix¹, an organization can reap the benefits of centralized deployment and maintenance, as well as "anytime, anywhere" access. ACT! may be installed on Microsoft Terminal Servers with or without Citrix.

Although there are some small differences in deployment of ACT! if Citrix is used, the differences are the same as for any application deployed on a Terminal Server. In this paper, statements regarding the use of Citrix also apply to the use of Terminal Services without Citrix, unless a difference is explicitly stated.

Deployment Options

The following sections compare the traditional ACT! Premium for Workgroups desktop deployment and a simple deployment using Terminal Services/Citrix. Also outlined are the organizational benefits of deployment using Terminal Services/Citrix.

ACT! can be installed on Microsoft Terminal Servers with or without Citrix.

¹ Citrix and Terminal Services require specific configurations. Citrix supported using Presentation Server V3.0 and V4.0. Microsoft Terminal Services is an optional component of Windows 2000 Server and Windows Server 2003. Terminal Services allows for multiple, remote user logins using the Microsoft RDP protocol. Citrix installs over and builds on Terminal Services with additional functionality using the ICA protocol included with MetaFrame (now called Presentation Server). Basic Terminal Services and Citrix value add are not covered in this paper. For specific information on these products please see the Microsoft or Citrix Web sites.

Desktop Deployment of ACT! Premium for Workgroups

In a desktop deployment, ACT! (and any software that ACT! will integrate with, such as Microsoft Office), is installed locally onto each user's PC. The database is often centralized, typically using Microsoft® SQL Server™, allowing the group to share contact information. Each user has a personal login. This personal account allows individual e-mail and scheduling, and permits the software to track activity associated with a contact to the individual user.

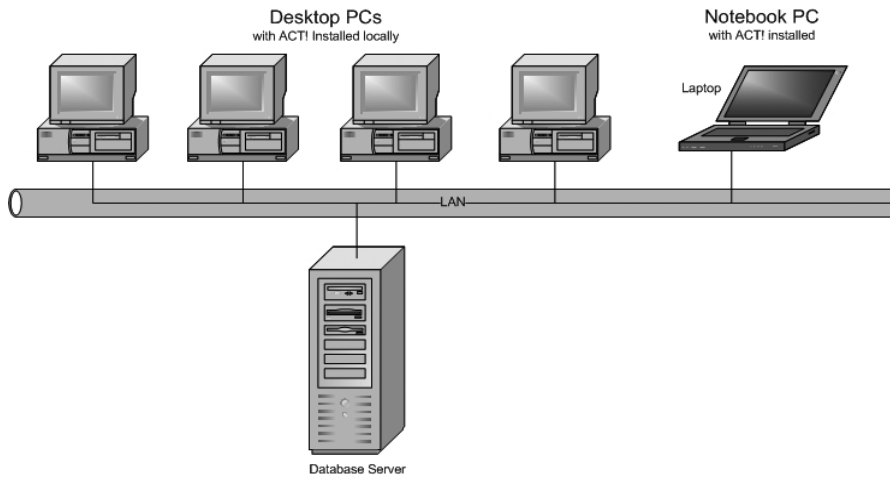


Figure 1 - Desktop Deployment without Terminal Services or Citrix

As with any installed application, each machine with ACT! needs to be individually and physically managed for installation, set-up and maintenance (other than that which can be handled through the database). This is manageable in small deployments, but becomes more challenging with larger user counts, greater computer variety and remote users. For remote users, the ACT! Premium for Workgroups database is often centralized with secure access through a VPN. Remote ACT! users can have the choice of real-time database access or periodic synchronization. To simplify remote deployments, provide administration flexibility and increase security, companies often look to deploy ACT! through Terminal Services/Citrix.

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Simple Deployment using Terminal Services/Citrix

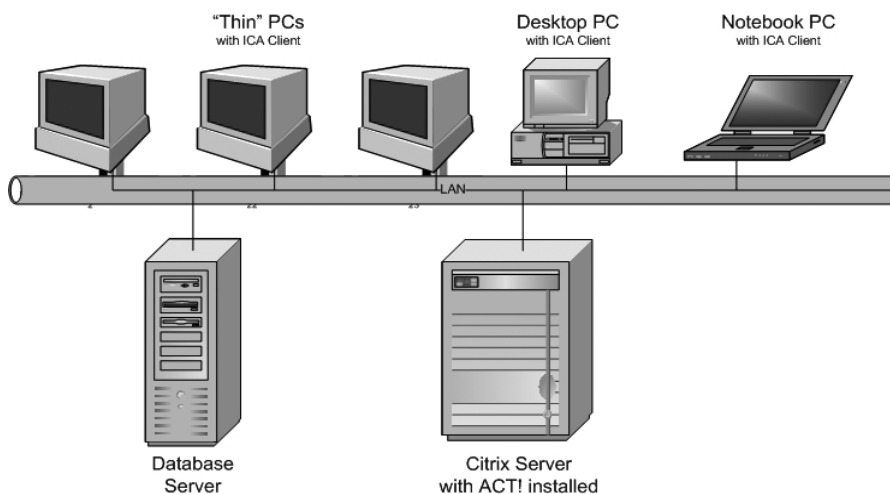


Figure 2 - Simple Citrix² Deployment

In this deployment, ACT! (and software it integrates with) is installed once – on the Citrix Server³. The only software needed on the end user's computer is a Citrix ICA client and, optionally, a Web browser⁴.

The administrator performs additional setup activities on the Citrix Server for each user of ACT!; this is faster than installing and configuring each PC. All maintenance activity is also centralized – so the administrator no longer has to visit the users' desks. Tools that come with Citrix, such as session shadowing, allow the administrator to view and/or take control of a user session. This dramatically increases both user and administrator productivity.

ACT! Premium for Workgroups Licensing on Terminal Servers/Citrix

Although only one copy of ACT! is installed, each user connecting to ACT! needs a valid license count in ACT!. Therefore, the serial number installed and activated in ACT! must have sufficient licenses to accommodate all users accessing ACT! via Citrix.

Benefits of Deploying ACT! Premium for Workgroups Using Terminal Services/Citrix

Deploying ACT! using Terminal Services/Citrix has advantages for both users and administrators.

User Benefits:

- No need to install, configure or manage ACT! on their computer. All set-up and administration is performed by others.
- In addition to Windows PCs, ACT! can be available from a range of computers including Macintosh®, Linux PCs, thin clients, etc.
- Anytime, anywhere access to ACT!.
- Due to low bandwidth requirements, ACT! users may experience improved performance on less capable hardware. The same is true for remote users on a high latency WAN.

Administration Benefits:

- Central installation and maintenance of the ACT! application and database.
- ACT! deployed as part of a published desktop or published application (Citrix).
- Easily "shadow" ACT! users for troubleshooting and/or training.
- Enhanced ACT! security using SSL and strong authentication methods.
- Better ACT! performance from a range of different machines, network topologies and network latency.
- ACT! deployment and administration consistent with other applications.

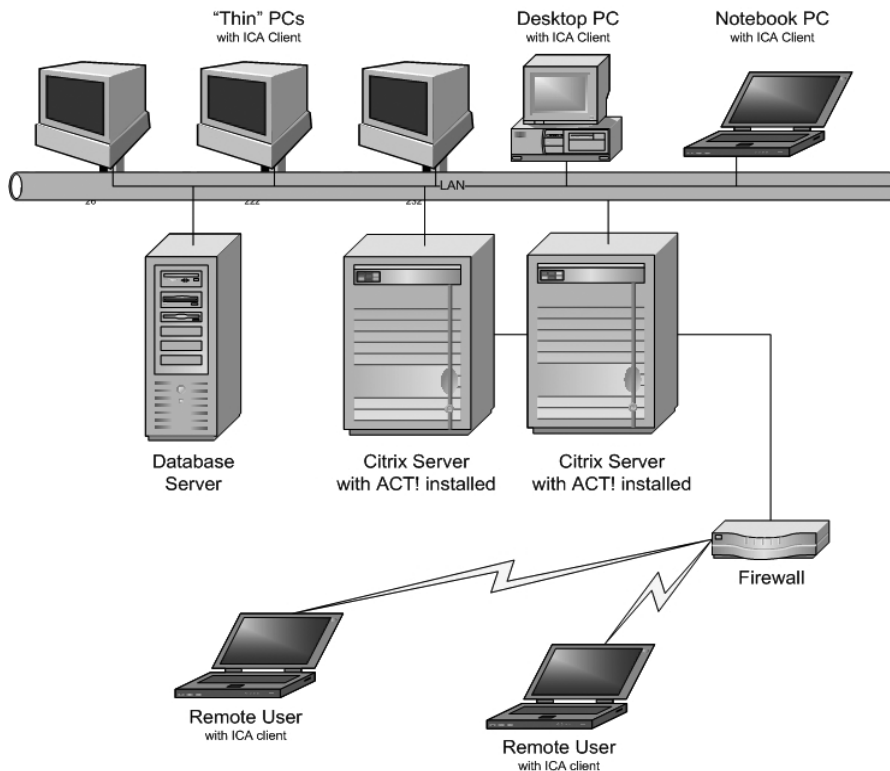
Using Terminal Services/Citrix, ACT! can be made available on computers other than Windows PCs, including thin clients, Macintosh, Linux PCs, or any device with an RDP or ICA client. Users also benefit from increased ACT! access since deploying ACT! on the Terminal Server allows user access from any computer. This includes computers elsewhere in the building or outside the office. ACT! users can work from home on their personal PCs, on the road in a hotel, or at an Internet café, etc., without having to install software.

Using Terminal Services/Citrix, ACT! can be made available on computers other than Windows PCs, including thin clients, Macintosh, Linux PCs, or any device with an RDP or ICA client.

³ The SQL Database may be installed on the Citrix Terminal Server.

⁴ If native Terminal Services is used without Citrix, then the Microsoft Remote Desktop Connection Client is needed. This is part of Windows XP, but can be downloaded for older operating systems.

When deployed using Terminal Services and/or Citrix, the memory and CPU requirements on individual user desktops and notebooks are significantly reduced. On the Terminal Server, each user is running a copy of ACT!. While the Terminal Server will be a more robust computer than a typical desktop PC, as more users are added, the ability for a single server to sustain desired performance is eroded. As user counts increase, multiple servers may be deployed, as is shown in Figure 3. Adding additional servers and leveraging built-in load balancing make it easy to add additional users and/or enhance performance levels. Please note that due to the resource requirements of a robust application like ACT!, administrators should carefully monitor the number of users per Terminal Server and adjust to match performance requirements.



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Figure 3 - Multiple Citrix Servers and Remote Access

Load Balancing

While individual users may be assigned to specific servers, it is more common to use a load balancer. For ACT!, DNS round-robin load balancing (such as Windows Network Load Balancer, which often is used in a Web farm) is sufficient. Citrix also has a load balancer that can be used to monitor the number of concurrent sessions and optimally assign user connections. This is often superior to DNS because it is more intelligent in how it determines which server to access. When users might be assigned to different servers by a load balancer, Roaming Profiles are typically used so that user-specific settings⁵ follow the user, no matter which server they are connected to.

Note: Load balancing and roaming profiles are not covered further in this paper because there is nothing specific about deploying ACT! with these components present that is different than for any other application. However, they are an important part of deployment considerations.

⁵ For example, this includes the user's "My Documents" folder, application shortcuts, and registry settings affecting user-specific application customizations.

Secure Remote Access

Secure remote access to ACT! data is a critical requirement for the user, administrator and company. There are several options to choose from. A Virtual Private Network (VPN) access solution for the remote users is one option. Typically, the VPN device exists in a DMZ, between the outside and inside firewalls. Citrix offers two additional options: the Citrix Secure Gateway (CSG) and the Citrix Access Gateway (CAG).

- CSG is software added to a Microsoft-based server placed within the DMZ. Remote users access the CSG via a Web browser using Secured Sockets Layer (SSL). Once users authenticate within the DMZ, they are granted access to the Citrix Servers inside the firewall.
- CAG is dedicated hardware that acts as a hardened SSL/VPN appliance for use in the DMZ. This provides a more secure access solution.

Though not shown in the deployment illustrations, these products are transparent from within ACT! and are recommended for their security benefits.

Customers without VPN access via Citrix may use an existing VPN (Cisco® or others) for remote access through the firewall. Directly exposing the Microsoft Terminal Server RDP (port 3389) or Citrix ICA (port 1494 or 2598) ports to the outside world is not recommended because of the likelihood of attacks against them. Some enterprises that expose RDP or ICA protocols directly (rather than through SSL) renumber these ports, but port scanners can still find them. More information on securing the access is available from Microsoft and Citrix, as well as many Terminal Server-oriented Web sites.

System Requirements

The minimum system requirements for ACT! Premium for Workgroups are all that is required for using ACT! in a Citrix environment.

In planning the system, the administrator should consider ACT! as a substantial platform to be added to the server(s), since users typically leave ACT! open all day long.

Recommended Citrix/Terminal Server Platform for use with ACT!:

CPU: 2.5Ghz or more Dual processor

RAM: 2GB or more

Pagefile: Fixed minimum/maximum size of 2.5 times RAM size (do not allow to grow)

Disk: 10,000RPM SCSI drive(s) with cache. 40GB, two separate drives (not partitions)

Additional Notes when considering System Requirements:

- Turning on HyperThreading may yield about 1.8 processor equivalents for ACT! (recommended only enable on Windows 2003 systems).
- Two separate drives are preferable to a single drive. This is often referred to as "two spindles." When using two drives, install OS/page file on first drive, ACT! and database to second drive.
- The initial database file of 20MB is included in this number. Additional disk space for growth of the database should also be considered. (Keep in mind that if ACT! internal e-mail software is used, storage for these e-mails will be in the database.)

Deploying ACT! using Terminal Services/Citrix provides secure, remote access to critical contact and customer information.

- ACT! Premium for Workgroups installation requires 1000MB of disk space for installation. Most of this space is used in the installation folder selected by the installer; however a sizable portion is installed in the Windows GAC (Global Assembly Cache). Each ACT! user will require an additional 30MB in their profile folder.

At runtime, each concurrently logged in ACT! user will use 80-95MB of memory for ACT! itself. If the ACT! internal e-mail is used, the user will require an additional 15-20MB. If the server has insufficient memory resources, user scalability is impacted.

ACT! uses significant CPU resources as well. When the user has ACT! open but is not actively working with it, the CPU resources are minimal. When actively using ACT!, the user will consume significant CPU resources in short bursts. The activity level of the users will limit the scalability on the Terminal Server.

Installing ACT! Using Terminal Services/Citrix

This section provides guidance to an administrator who is installing ACT! on a Citrix/Terminal Server. Consult the ACT! Start Here Guide for the most current information on installing ACT!.

The administrator installs ACT! and related software in this order:

1. Install Terminal Services/Citrix on the server⁶.
2. Install any software that ACT! integrates with, such as Microsoft Outlook® and Word.
3. Install ACT! Premium for Workgroups.

The administrator performs all installation activities with the Terminal Server in “install mode.” The following sections provide a recommended method to install ACT! in a Citrix/Terminal Server setting. Generally, this method consists of the following activities:

Order	Description	Where this is done
1	Installing the database server software (CD2)	On the PC that will house the database
2	Installing ACT! (CD1)	On each server that will house ACT! users via Citrix or Terminal Server
3	Activating and registering ACT!	
4	Performing site-specific customizations	
5	Deploying ACT! for multi-user access	
6	Publishing ACT! as a Citrix-published application	Once, from any machine with the Citrix Management Console installed
7	Initializing individual user setups	For each user (with roaming profiles, this can be done on any Citrix/Terminal Server)

The following sections provide details for each step.

Using Terminal Services/Citrix the performance requirements of the user's client machine are reduced since the only software running on the client is a browser and/or ICA/RDP client.

Step 1: Installing the Database Server Software

The second ACT! CD includes SQL Server 2005 Standard Edition and SQL Server Service Pack 1. The ACT! installer guides you through the installation of the components necessary, including SQL Server, the Service Pack, and the hot fix and through the creation of the ACT! database. You install the software only on the machine that will host the database.

Do the following:

Note: You must be a System Administrator to perform this installation and use the "Change user/install" command before installation.

1. If you have installed or uninstalled any version of SQL Server (including SQL Express) from the server, reboot the server before starting this installation.
2. First, install the database using CD2. Follow the instructions on screen. Be patient, as progress in some cases is not evident for some time.
3. Reboot the system after installation is complete.

CD2 installs SQL Server and the Service Packs, and it creates and starts the ACT! instance. It also installs a file that users use to access the database. This file, called a PAD file, needs to be accessible to ACT! users. When the database is on a separate machine, the PAD file is usually made available via a shared folder or mapped drive.

4. Make the PAD file available (read-only) to all users, via a shared folder or mapped drive.

Step 2: Installing ACT!

Once the database is in place (and the system has been rebooted), you can install ACT! program files on the Terminal Servers. The basic installation, allowing the administrator to run ACT!, is simple.

Do the following:

1. Log on to the server as an administrator.
2. *Change user/install.*
3. Launch the installer from CD1.
4. Follow the instructions.
5. Near the end of the installation is an option to launch ACT!. Because the server is in install mode, do **not** select this option.
6. After installation is complete, *Change user/execute.*

Step 3: Activating and Registering ACT!

The administrator starts ACT! to obtain any available updates from the Web, set standard preferences, and create the database.

Each user requires access to the database file. By default, ACT! suggests a location for the PAD file in the profile of the user who creates the database. In the Terminal Server environment, this location should be overridden.

Centralized administration saves administrators time during the installation process.

- In a single Terminal Server environment, a new subfolder in the install folder may be appropriate, or the administrator may choose another location.
- If multiple, load-balanced, Terminal Servers are in use, a single machine should be responsible for hosting the database files, and it should be made available via a mounted share. Select the option to “Share this database with other users” when creating the database; the folder selected for the database will be mounted for you as a share. Default permissions for this share are Read/Write for “Everyone”, since ACT! users need full access to this folder. Share this folder only if multiple servers are used, **not** if multiple users access one server.

Do the following:

1. Log on as an administrator to the server that has ACT! installed and that will house the database.
2. *Change user/install.*
3. Create any folders or mapping needed for the database.
4. Launch ACT!.
5. When prompted to check for updates, click *Yes*. Follow the instructions that appear.
6. When the Registration and Activation Wizard appears, follow the instructions.
7. When the Getting Started Wizard appears:
 - Step 1: Selecting the “In the future, hide this page” option only affects this user. Click *Next*.
 - Step 2: Select a word processor (ACT! or other, if detected), and then click *Next*.
 - Step 3: Select *Skip e-mail Setup*, and then click *Next* (if the administrator is not a regular user of ACT!).
 - Step 4: If a database has not been created, select *Create new database*, and then click *Next*.
 - Step 5: Select a database name. Change the location to the shared folder where the database file will reside. Select the *Share this database with other users* checkbox. Enter a user name and password, and then click *Next*.

Note: This is a user name and password for this administrator to open the ACT! database. This name/password will have full administrator rights to the database.
 - Step 6: Click *Finish*.
8. ACT! opens. You may be prompted to import Outlook contacts, even if e-mail was not set up, and Outlook is not installed. Click *No* (if the administrator does not normally use ACT! from this account).
9. If user teams are desired, from the menu bar, select *Tools* → *Manage Teams*. For each ACT! team, select *Create Team*.
10. From the menu bar, select *Tools* → *Manage Users*. For each ACT! user licensed, select *Create New User*.
11. Continue with any other site/tenant-specific customizations (such as in *Tools* → *Preferences*).
12. Exit ACT!.
13. *Change user/execute.*
14. On additional servers, follow the same steps, except in step 4: skip database creation and open the shared database mounted from another server via the “PAD” file.

Step 4: Performing Site-Specific Customizations

ACT! can be customized by end users. Generally, these customizations are stored in XML-formatted files under the user profile folder. The preferred method of customization is to use ACT! to modify these preferences. See the ACT! User's Guide or online Help for information regarding customization. The administrator should make company-specific customizations before deploying to users (see "Multi-User Deployment," which follows this section).

Do the following:

1. Log on as the administrator who installed the software.
2. *Change user/execute.*
3. Launch ACT!.
4. Change settings and preferences as desired. These settings should be site-specific, **not** user-specific. Although these settings will be the default, users can override them.
5. Exit ACT!.

Users still have options for user-specific customizations.

Step 5: Deploying for Multi-User

This section explains how to copy shortcuts and files from the administrator's profile to the All Users profile. After this is done, when users run ACT! and change their profiles, the changed files are copied to the users' profiles. The ACT! XML files are stored in an ACT! folder in the user's hidden "Application Data" folder.

Note: After deploying ACT! to multiple users, the administrator could make company-wide customizations by manually editing the XML files for each user. If users have not modified their profiles, the administrator can manually edit the file copy in the All Users profile.

Do the following:

1. Log on as a system administrator.
2. Open Windows Explorer.
Note: You must be able to view hidden files and folders. To set this option, in Windows Explorer: Tools → Folder Options, View tab.
3. For a full desktop deployment:
 - In the folder: C:\Documents and Settings\All users\Start Menu\Programs\ACT! Premium, remove the *Uninstall* shortcut and any others desired.
Note: If only a subset of the server users will use ACT!, you might want to remove all the shortcut entries from the All users start menu.
 - Browse to C:\Documents and Settings\All Users\Start Menu\Programs\Startup.
 - If desired, delete the *Service Manager* shortcut. This puts an SQL manager shortcut into the tray icon area of the desktop, which is probably not appropriate for most users.
Note: The desktop shortcut to ACT! is only added to the desktop of the user that did the installation. For a full desktop deployment, you might move that shortcut to the All Users desktop instead.

4. Go to the C:\Documents and Settings\All Users\Application Data\ folder. Copy the ACT! folder from the administrator's account (C:\Documents and Settings\name-of-administrator\Application Data\ACT!) into this folder. When the warning message appears saying that the two files under the E-mail subfolder are in use and will not copy, click *OK*. You do not want to copy them.

Step 6: Publishing ACT! as a Citrix-Published Application

This step is taken once ACT! is installed on all servers in a farm or silo.

In a Citrix installation, some enterprises use published applications rather than published desktops. The administrator can add ACT! as a published application as described in the following procedure. (The procedure example uses Presentation Server 3.0, however, the steps are similar for other Citrix versions.)

Do the following:

1. Start the Citrix Management Console and log on to the farm.
2. Right-click on *Applications*, and then select *Publish Application*.
3. Enter *Display Name* and a description ("ACT!").
4. For the Application Type, select *Application*. Browse for the command line, selecting *ACT8.exe* from the installation folder (generally, under Program Files). Click *Next*.
5. Specify servers: Add each server ACT! was installed on.
6. Specify users: Because personalization files are stored in each user's profile, do **not** select *Allow Anonymous Connections*.

Web Browser Redirection⁷, if used, will work for on-line Help and requests for maps. Product registration and updates require the use of the browser on the server.

Step 7: Initializing Individual User Setups

For integration with e-mail, the administrator can:

- Log on as each user to perform per-user customizations; or
- Provide information to users and ask them to perform these steps.

Setting up e-mail integration can be done either by using the Getting Started Wizard or through Preferences (Tools → Preferences → Email Tab → Email System Setup). For the purposes of this paper, we have documented set-up using the Getting Started Wizard.

Integration with Internet Mail

The Internet Mail feature of ACT! is an e-mail client that stores mail in a single e-mail database that all users share. This client uses folders much like Outlook does and is capable of handling all user e-mail needs. The client integrates with SMTP/POP3 servers to deliver and receive e-mail. The e-mail address for the SMTP server should be set up before performing this step.

1. Launch ACT! as a user.
2. The *upgrade option* appears. Ignore.

⁷ This is a Citrix feature that is optionally used by some companies. When enabled, any requests to view Web pages are redirected back to the client PC to be executed on the local desktop.

3. The *register* option appears if the application has not been registered. This is another item the administrator can move to the console. Ignore.
4. *Getting started* appears (even though we checked it before). Select the checkbox *In the future, hide this page*, and then click *Next*.
5. Select the appropriate word processor. Click *Next*.
6. Select *Set up e-mail, Internet Mail*. Click *Next*.
7. Select *Default Account*: Enter the user name for the e-mail account, and then click *Next*.
8. On the User Information tab, fill in the *Account name* and other fields, as appropriate. Also fill in information on other tabs, as appropriate. Test the account connection, and then click *OK*.
9. Click *Next* twice.
10. Database Setup: Select *Skip database setup*. Click *Next*.
11. Click *Finish*.
12. Select *Open Database*, and then select the PAD file in the shared folder.
13. Enter the user name and password, and then click *OK*.
14. In the Contact Detail view for the user, enter the e-mail address.
15. Exit ACT!.

Repeat these steps for each user.

Integration with other e-mail programs

Integration with other e-mail programs, such as Outlook or Outlook Express, follows the same strategy as for the ACT! Internet Mail. Simply complete steps 1-5. In Step 6, instead of selecting Internet Mail, select the supported ACT! e-mail program you are looking to integrate with and follow the Wizard from there.

Multi-Tenancy Setup

Multi-Tenancy refers to an Application Service Provider (ASP), where multiple, independent customers are supported by the same server. It also applies to an Enterprise where distinct groups want to use different databases. This section covers set-up issues to consider for multi-tenancy.

ACT! can work in a multi-tenant setup if self-provisioning is not a desired feature. Each tenant will have a unique database. The administrator should create each database in a different folder and put appropriate Access Control List (ACL) protections in place to prevent other tenants from accessing them.

With Multi-Tenancy, the administrator does not copy files into the All Users profile. The easiest approach is for the system administrator to use a different Windows administrator account for each tenant.

The administrator logs into each Windows administrator account and completes the steps under *Deploying for Multi-Users*, except for copying the ACT! folder into the All Users folder. Instead, the administrator copies these files into each user's profile for that tenant.

Summary

ACT! Premium for Workgroups can be effectively deployed using Microsoft Terminal Services and Citrix. There are numerous benefits:

- Lower maintenance costs resulting from component centralization. ACT! components are installed centrally on a few servers. The ACT! administrator no longer has to go to these PCs to perform maintenance tasks.
- Secure remote access for those on the road. This configuration provides access to the data without it ever leaving the building or campus. ACT! users can access the data wherever they are – in a hotel, airport, or another office within the building.
- Fewer ports exposed through the firewall.
- Typically less WAN traffic for a remote user than with a traditional remote desktop installation with VPN access.
- ACT! can be deployed to a user base of various machines such as Macintosh, Thin Clients, Linux PCs, etc.
- Performance requirements of the user's client machine are reduced since the only software running on the client is a browser and/or ICA/RDP client.
- Enhanced training opportunities that allow an administrator to "shadow" a user's session to either walk the user through using the software or take control of the session and perform a task.



Your business in mind.

United States

8800 North Gainey Center Drive,
Suite 200
Scottsdale, Arizona 85258
1-866-795-3711
5 users or more: 888-855-5222
Canada: 866-665-2688
www.act.com

France

10 rue Fructidor
75834 PARIS Cedex 17
France
+33 1 41 66 25 25
www.sagecrm.fr

Germany

Berner Strasse 23
60437 Frankfurt
Germany
+49-69-50007.6260
www.sage.de/act

Australia/New Zealand

Level 1, 114 William Street
Melbourne, VIC
Australia 3000
1 300 SAGE CRM
www.sagecrm.com.au

United Kingdom

North Park
Newcastle Upon Tyne
NE13 9AA
0845 245 0276
www.sage.co.uk/act

Spain

Labastida, 10-12
28034 Madrid
España
+34 91 334 92 92
www.sagecrm.es

Belgium

Quai Mativa 23
4020 Liège
+32 4 343 77 46
www.sagebobsoftware.be

Asia

51 Bras Basah Road
#06-04 Plaza By The Park
Singapore 189554
+65 6336 6118
www.act.com