

## CRM Product Comparison SalesLogix, Microsoft CRM, ACT!

This document was prepared by Stephen Pond Consulting, LLC and is compiled from internal product experience.

	SalesLogix v6.1	Microsoft CRM v1.0	ACT! v6
<b>Database</b>			
<b>Oracle Support</b>	✓		
<b>Microsoft SQL 7 Support</b>	✓		
<b>Microsoft SQL 2000 Support</b>	✓	✓	
<b>Dbase Support</b>			✓
<b>Installation</b>			
<b>Flexible Configuration</b> <i>Microsoft CRM has strict requirements, one of them being the dependency on Active Directory in Native Mode. Companies using NT 4.0 as a domain controller would need to upgrade to Windows Server 2000 running Active Directory in Native Mode. Both SalesLogix and ACT! can operate in a workgroup environment, although it is recommend that SalesLogix operate in a domain environment.</i>	✓		✓
<b>Easy Installation</b> <i>If all of the requirements for Microsoft CRM have been met, the actual installation is not difficult.</i>	✓	✓	✓
<b>Ability to have multiple databases in the same environment</b> <i>Because Microsoft CRM is dependant on Active Directory, multiple instances of the Microsoft CRM database cannot co-exist in the same environment, making testing for development difficult and having two instances impossible. SalesLogix and ACT! both offer the ability to have an unlimited number of instances in the same environment.</i>	✓		✓
<b>Customization</b>			
<b>Ability to create one to one tables</b>	✓		
<b>Ability to create one to many tables</b> <i>At this time, Microsoft CRM and ACT! do not have the ability to create custom tables. This can be a setback which can prevent a company from modifying the product to support the business needs. SalesLogix has the ability to create one to One, or One to Many associated tables.</i>	✓		
<b>Ability to create custom fields</b> <i>Microsoft CRM only allows fields to be added to base tables. SalesLogix only allows field to be added to custom tables and specific base tables, ACT! only allows fields to be added to the Contact and Group tables.</i>	✓	✓	✓
<b>Ability to create custom forms</b> <i>Microsoft CRM only allows the base forms to be <b>modified</b>, where only fields, sections and tabs can be added. SalesLogix offers complete flexibility to create new forms or modify most base forms. ACT! offers the ability to create new Contact and Group Layout forms.</i>	✓		✓
<b>VB Scripting Support</b> <i>SalesLogix offers a robust customization tool “out of the box” and allows for a developer to create highly custom features using standard Microsoft Visual Basic. ACT! requires the use of the SDK in order to use VBA scripting. Microsoft CRM offers an SDK, but requires a highly skilled developer knowledgeable with Microsoft Visual Studio .Net. Microsoft CRM does not allow any type of VBA scripting with the “out of the box” product, with the exception of the workflow tool.</i>	✓		



<b>Consistent design environment for both Web and LAN Client</b> <i>Because of it's .Net and XML architecture, Microsoft CRM offers a consistent design environment for both the Browser and Sales for Outlook Client. Customizations only need to be created once, and will apply to both Browser and Sales for Outlook Client. SalesLogix and ACT! have two different development environments for both Web and LAN client. If customizations were designed for one, the customizations have to be redesigned for the other, increasing the cost of development and causing potential inconsistencies.</i>		✓	
<b>Ability to create data grids for one to many associated data</b> <i>Microsoft CRM and ACT! do not have the ability to create data grids. SalesLogix can have a custom data grid that can be displayed on a new tab, or anywhere within the application.</i>	✓		
<b>Ability to create views</b> <i>SalesLogix offers the user complete ability to create custom views called Groups using the SalesLogix query builder. Microsoft CRM offers views, but they can only be created by users with the proper security access.</i>	✓	✓	
<b>Support for .Net services</b> <i>Microsoft CRM is completely designed in the .Net architecture and uses XML natively with secure SOAP API's. Although SalesLogix is not a true .Net system, it does support SOAP objects.</i>	✓	✓	

### User Interface

<b>Mail Merge ability with Microsoft Word</b> <i>*Mail Merge ability in Microsoft CRM is limited to the Sales for Outlook client only. Users using the Browser client do not have mail merge capabilities with MS Word.</i>	✓	✓*	✓
<b>PDA Integration</b> <i>At this time, only ACT! offers true integration with PDA's. SalesLogix can synchronize with PDA's only by using the Advanced Outlook Integration, then synching the PDA with Outlook. Microsoft CRM does not have any PDA support at this time, but can with third party add-ons. ACT! has both a client called ACT! for Palm that supports the Palm OS, and a synchronization with the Pocket PC called ACT! for Pocket PC. Note: Third party add-ons are available for Microsoft CRM and SalesLogix for connected and wireless PDA's.</i>		(coming soon)	✓
<b>Recurring Activities</b> <i>Technically, Microsoft CRM does not have the ability to create recurring activities. The only way recurring activities can be created in Microsoft CRM is using the Sales for Outlook client, where it's actually the Outlook activity that has the recurring parameters, and not Microsoft CRM.</i>	✓		✓
<b>Activity Alarms</b> <i>Technically, Microsoft CRM does not have activity alarms. Alarms are only created if creating an activity in the Sales for Outlook client where the alarms are actually in Outlook, and not Microsoft CRM. The browser version does not have activity alarms. Both SalesLogix and ACT! have activity alarms.</i>	✓		✓
<b>Reports for Remote Users</b> <i>Both SalesLogix and ACT! have full reporting ability for remote users. Microsoft CRM only has reports available to remote users when they are Online.</i>	✓		✓
<b>Data Replace Feature</b> <i>At this time, Microsoft CRM does not have any data management utilities for end users. Both SalesLogix and ACT! offer tools for end users to globally replace values in fields for specific records.</i>	✓		✓
<b>Territory Realignment Tools</b> <i>SalesLogix is the only product that has a robust territory realignment feature. This is extremely useful when sales reps leave the company, or move to a different territory. Activities, Account assignments, Account Ownership, or</i>	✓		



<i>Opportunities can easily be reassigned to a new representative, or team.</i>			
<b>Duplicate Elimination Tools</b> <i>Currently Microsoft CRM does not have the ability to find and eliminate duplicate records. SalesLogix has had this functionality since 1.0.</i>	✓		✓
<b>Process/Workflow Tools</b> <i>Microsoft CRM Professional, and all editions of SalesLogix have workflow tools. The SalesLogix tool is called the Process builder, and has a graphical user interface that is both powerful and easy to use.</i>	✓	✓	
<b>Account Management</b> <i>Both SalesLogix and Microsoft CRM offer a table to store Account information. At this time, ACT! is based on a Contact, and not an Account.</i>	✓	✓	
<b>Web Client</b> <i>All three products have a web client. Only Microsoft CRM offers true consistency between both the Web and Sales for Outlook Client including a single design environment.</i>	✓	✓	✓
<b>Low Bandwidth Synchronization</b> <i>Microsoft CRM requires high bandwidth to synchronize, at least 256K connection. SalesLogix and ACT! can synchronize using dial up connections.</i>	✓		✓
<b>FTP Synchronization</b> <i>Only SalesLogix offers FTP synchronization out of the box.</i>	✓		
<b>Email Synchronization</b> <i>Only ACT! offers synchronization via email.</i>			✓
<b>Network Synchronization</b> <i>All products can synchronize through the network, or extranet using a VPN connection. Microsoft CRM has to have access to the CRM server to synchronize.</i>	✓	✓	✓
<b>Single Sign On</b> <i>Because Microsoft CRM takes advantage of the Active Directory technology, Microsoft CRM users only have to log on once to have access to their data. In SalesLogix and ACT! the user has to log on, separately from their Windows Logon.</i>		✓	
<b>Advanced Product Support</b> <i>Microsoft CRM offers advanced product management and supports grouping of products into Kits, a feature SalesLogix does not have.</i>	✓	✓	
<b>Marketing Campaign Management</b> <i>Currently, Only SalesLogix has marketing campaign management features out of the box.</i>	✓		
<b>Outlook Integration</b> <i>All products offer Outlook Integration. However, Microsoft's view on "Integration" differs from both SalesLogix and ACT!. Microsoft claims integration because their Sales for Outlook Client is embedded within Outlook, whereas in SalesLogix, Outlook is embedded in SalesLogix. With Microsoft CRM, the user has to create activity and contacts in the Sales for Outlook client a specific way in order for the information to appear in both Outlook and Microsoft CRM. In SalesLogix, the data is actually synchronized in the background, seamless to end users. A contact can be created in SalesLogix, and it can then be synchronized to Outlook. The same is true for Activities. Note: SalesLogix and ACT! can support multiple Outlook/email Profiles, whereas Microsoft CRM can only have one Outlook/email profile present or it will disable the offline capabilities.</i>	✓	✓	✓
<b>Dynamic Form Assignment</b> <i>Only SalesLogix has the ability to assign a different Contact, Account, or Opportunity form based on a user, team, or department. This would allow different versions of the data to be used for different users/teams needs. In Microsoft CRM, everyone sees the same form.</i>	✓		