

White Paper – DoubleLook Enterprise

Wireless sync service between ACT! and phones

www.companionlink.com/enterprise

ABSTRACT

DoubleLook Enterprise (DLE) is a server-side application that will wirelessly synchronize ACT! data with the latest phones. DLE manages synchronization for multiple ACT! user accounts from one server-side application that runs on any PC or server in the office. DLE runs as an application and communicates with CompanionLink's secure cloud servers to sync data with phones. Once data is synchronized, it is removed from CompanionLink's servers (CompanionLink does not store ACT! data).

CompanionLink's wireless sync service is a cost-effective alternative for other mobile sync solutions like BlackBerry Enterprise Server (BES) or Exchange ActiveSync (EAS).

SYSTEM REQUIREMENTS

- ACT! versions 4.0 or higher
- Free mobile software installed each user's phone
 - Available during DLE configuration
- Wireless sync subscription for each user
 - \$9.95/user per month
 - Activate during DLE configuration

HOW IT WORKS



DoubleLook Enterprise (DLE) can be installed on any PC or server that has LAN access to the ACT! database (which may reside on a separate server or PC). The ACT! application must also be installed on the computer with DLE.

DLE runs as an application, synchronizing data between the ACT!, CompanionLink's cloud servers, and each user's phone. This process runs sequentially, user-by-user, for all licensed users of DLE. Data is securely exchanged between your PC and phone using CompanionLink's secure servers (with SSL encryption). Changes to data in ACT! are sent to CompanionLink's servers, which then relay this data to each user's phone. If data is changed on the phone, the updates are sent back to CompanionLink's servers, which in turn update the data in the user's ACT! database.

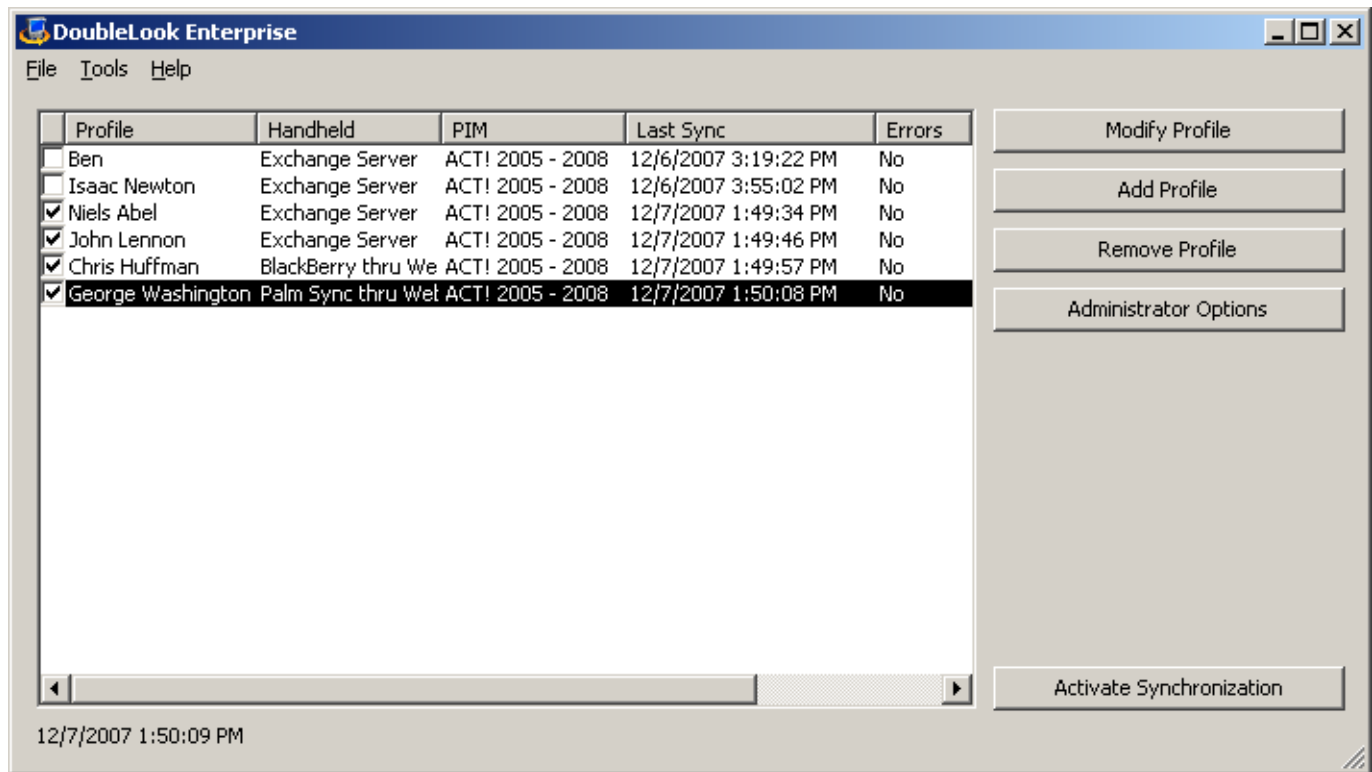
For example, if you have configured DLE to sync data for 20 users, the application will sync data for User 1, then User 2, and so forth. Once it completes sync for all 20 users, it will recycle back to User 1 and begin the process again.

DLE also runs a secondary Executable process called *ProcessLauncher.exe*. This process monitors DLE and reboots the application if it detects that the DLE application has hung or not responding.

USER MANAGEMENT CONSOLE

DLE has a user management console (UMC) that allows IT administrators to quickly set up and configure user accounts. The UMC gives administrators a single screen from which the sync relationships between each ACT! user and their phone can be set up. Administrators can choose to apply the default settings for all users, or individually customize the sync parameters for individual users. Users can be added, removed or disabled directly from this console.

The UMC also allows administrators to monitor synchronization status for all users. Statistics on the number of successful and unsuccessful synchronizations and service outages can be directly emailed to the administrator. This provides real-time notification of any service interruptions.



The user management console allows administration of all users from one screen.

FREQUENTLY ASKED QUESTIONS

Is there a limit to the number of records that DLE can wirelessly synchronize?

No. However, each phone has a threshold after which performance on the phone begins to deteriorate. This is due to design of the phone's operating system and the resources available to it (i.e., memory, CPU cycles, etc.). We recommend using categories and groups to limit the amount of data that wirelessly synchronizes with the phone.

Does the DLE login have to always be logged in for DLE to work?

Yes, the Windows account that runs DLE must be logged in for DLE to synchronize your data.

How can users keep private records on their phone from synchronizing from the ACT! database, which contains business information?

Records marked as private in your ACT! database will only synchronize with Exchange if the ACT! login info entered in the DLE configuration matches the login info for the record owner in ACT!.

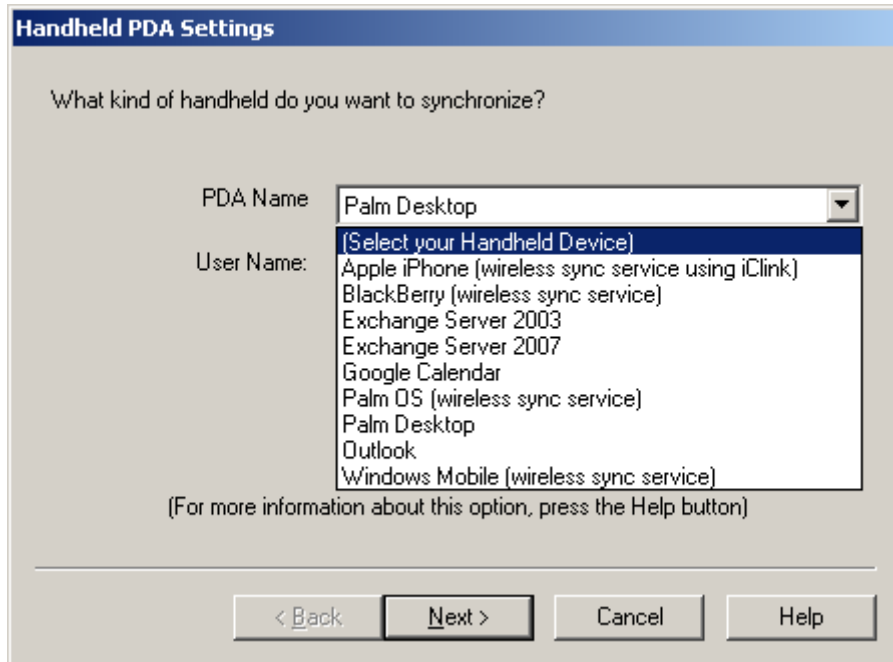
(NOTE: The ACT! login info in the DLE configuration is entered under the ACT! data tab.)

Public records will synchronize regardless of the record owner.

Also, DLE includes an option to exclude any data from the synchronization that is categorized as "Personal". This option can be found in the DLE configuration wizard, under the Personal Category tab.

(NOTE: To categorize an item as "Personal" in ACT!, set the ID/Status of the record to "Personal".)

DOUBLELOOK ENTERPRISE SCREENSHOTS



Handheld PDA Settings

What kind of handheld do you want to synchronize?

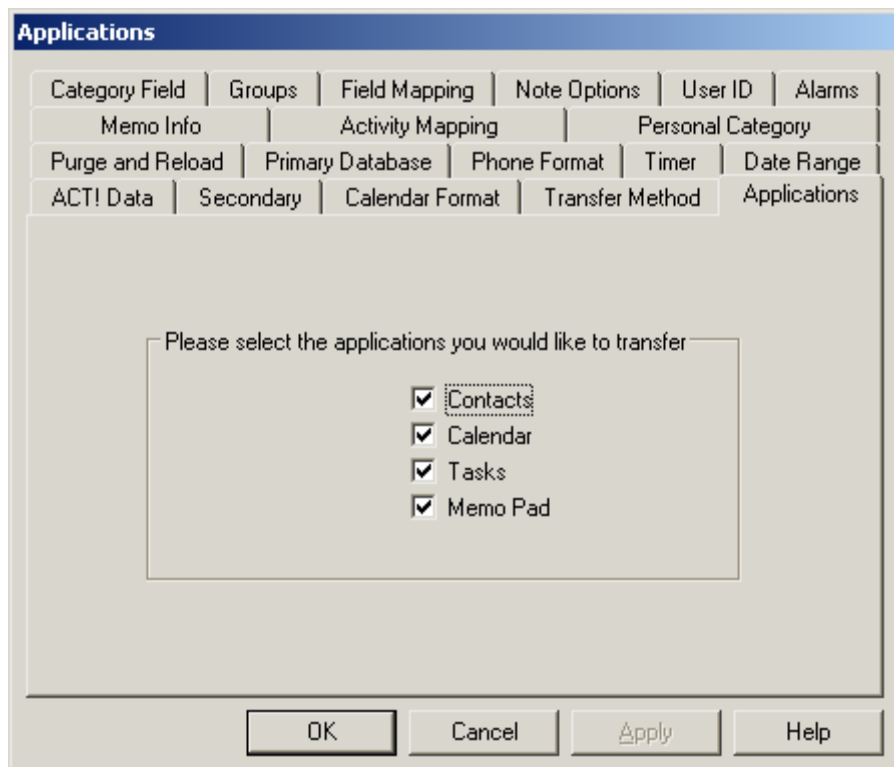
PDA Name: Palm Desktop

User Name: (Select your Handheld Device)
Apple iPhone (wireless sync service using iClink)
BlackBerry (wireless sync service)
Exchange Server 2003
Exchange Server 2007
Google Calendar
Palm OS (wireless sync service)
Palm Desktop
Outlook
Windows Mobile (wireless sync service)

(For more information about this option, press the Help button)

< Back Next > Cancel Help

Select your sync destination. This can be done a per-user basis.



Applications

Category Field	Groups	Field Mapping	Note Options	User ID	Alarms
Memo Info	Activity Mapping	Personal Category			
Purge and Reload	Primary Database	Phone Format	Timer	Date Range	
ACT! Data	Secondary	Calendar Format	Transfer Method	Applications	

Please select the applications you would like to transfer

- Contacts
- Calendar
- Tasks
- Memo Pad

OK Cancel Apply Help

Customize sync data types for each user