

# White Paper – DoubleLook Enterprise

Enterprise sync for ACT! and GoldMine

[www.companionlink.com/enterprise](http://www.companionlink.com/enterprise)

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## ABSTRACT

DoubleLook Enterprise (DLE) is a single install, server-side solution that extends mobile synchronization for organizations using CRM or PIM solutions like ACT! by Sage or GoldMine. For the purposes of this whitepaper, we will use ACT! as an example. DLE provides two-way synchronization of data – any data that is modified in either ACT!, on the handheld device, or in Exchange/Outlook will be synchronized. DLE manages synchronization for multiple ACT! user accounts.

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## SYSTEM REQUIREMENTS

- ACT! by Sage versions 4.0 or higher
- Microsoft Exchange Server 2003 and 2007 ([Option B only](#))
  - 1GB of free hard disk space recommended
  - 1GB of memory recommended

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## SUPPORTED PHONES & PDAs

- BlackBerry
- iPhone
- Windows Mobile
- Palm OS
- Google Android

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## PRODUCT DETAILS

DoubleLook Enterprise can be configured to sync in two different ways:

**Option A** – Synchronize ACT! data wirelessly with users' handheld devices (using CompanionLink's wireless sync service and not Microsoft Exchange)

DoubleLook Enterprise (DLE) installs on any dedicated computer that has an internet connection and access to the ACT! database. DLE runs 24/7 and checks both the ACT! database and every user's handheld device for changes to data. If data has changed in either location, DLE synchronizes the data. Synchronization with handheld devices is accomplished through CompanionLink's wireless sync server. There is a monthly fee for this service (currently \$9.95 per month per handheld device).

The synchronization process runs sequentially, user-by-user, for all licensed users of DLE. For example, if you have set up 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.

[See Option A on Page 3](#)

**Option B** – Synchronize ACT! data with Microsoft Exchange (**Currently in BETA**)

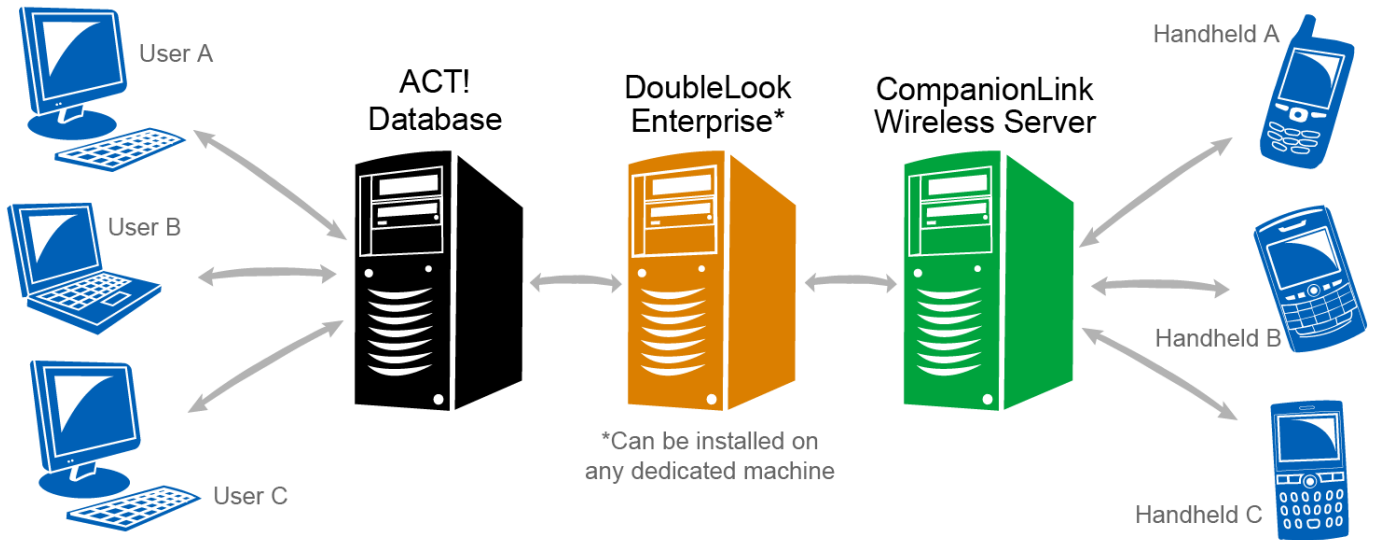
If you are running Exchange 2003, DoubleLook Enterprise (DLE) must be installed on the same machine as the Exchange 2003 server. If you are running Exchange 2007, DLE can be installed on any machine that's on the Exchange server domain.

With Exchange 2007, Outlook Web Access (OWA) must be configured for DLE to access your Exchange data. This requirement is not necessary for Exchange 2003. In both cases, the ACT! application must be installed on the same machine that DLE is installed on, and it must have access to your ACT! database.

DLE runs 24/7 as an application, synchronizing data in both the ACT! and Exchange databases. This process runs sequentially, user-by-user, for all licensed users of DLE. For example, if you have set up 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.

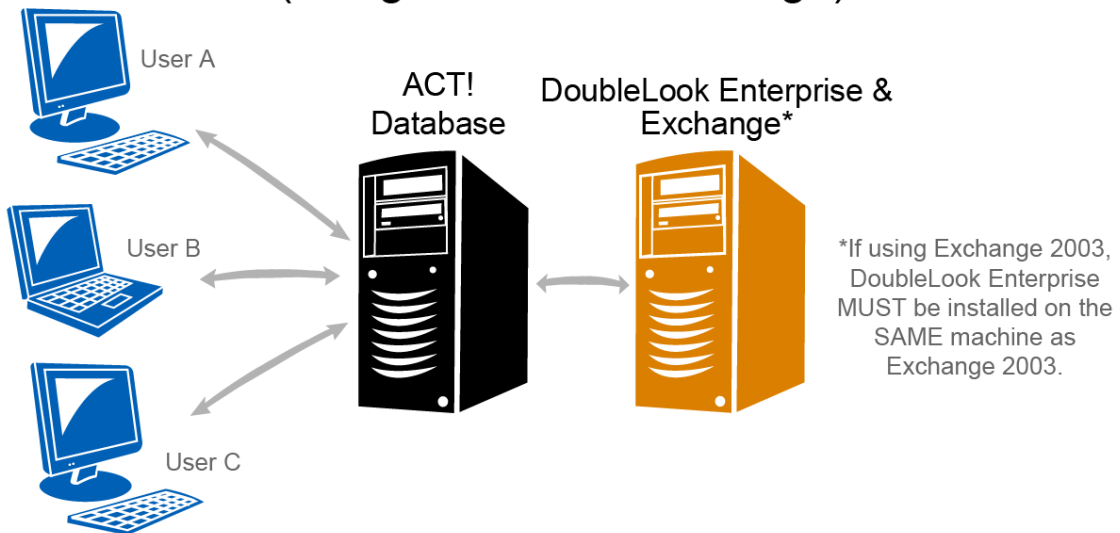
[See Option B on Page 3](#)

## OPTION A (using CompanionLink's wireless sync service)



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## OPTION B (using Microsoft Exchange)

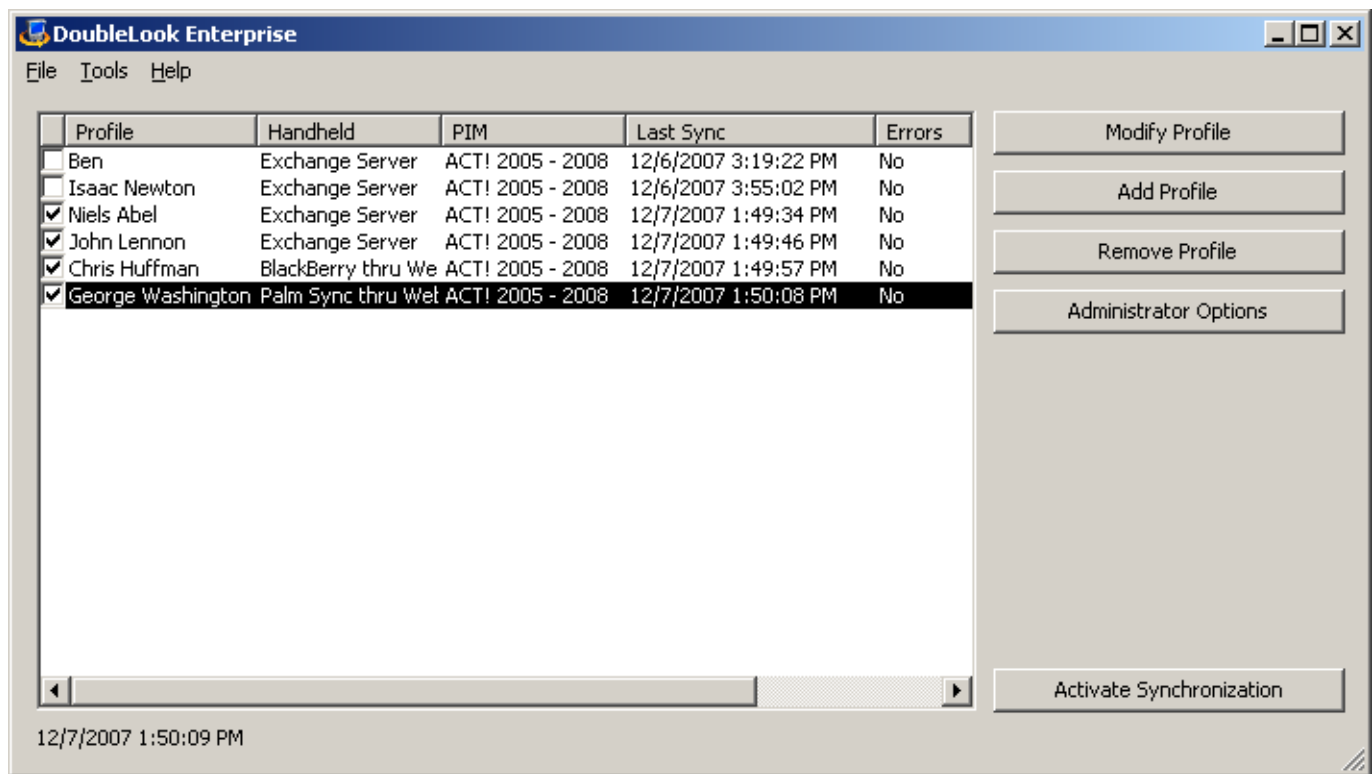


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## USER MANAGEMENT CONSOLE

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 user accounts in ACT! and user accounts in Exchange 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.**

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## FREQUENTLY ASKED QUESTIONS

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

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

### **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.

### **Can we run DLE without giving the admin account full mailbox rights when synchronizing with MS Exchange 2003?**

No. DLE requires that the admin account has full mailbox rights. This is a result of the Exchange security protocol, and cannot be modified by DLE.

(NOTE: This only applies to Exchange 2003 and **NOT** Exchange 2007.)

### **How can I keep private records private when synchronizing with MS Exchange?**

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!.

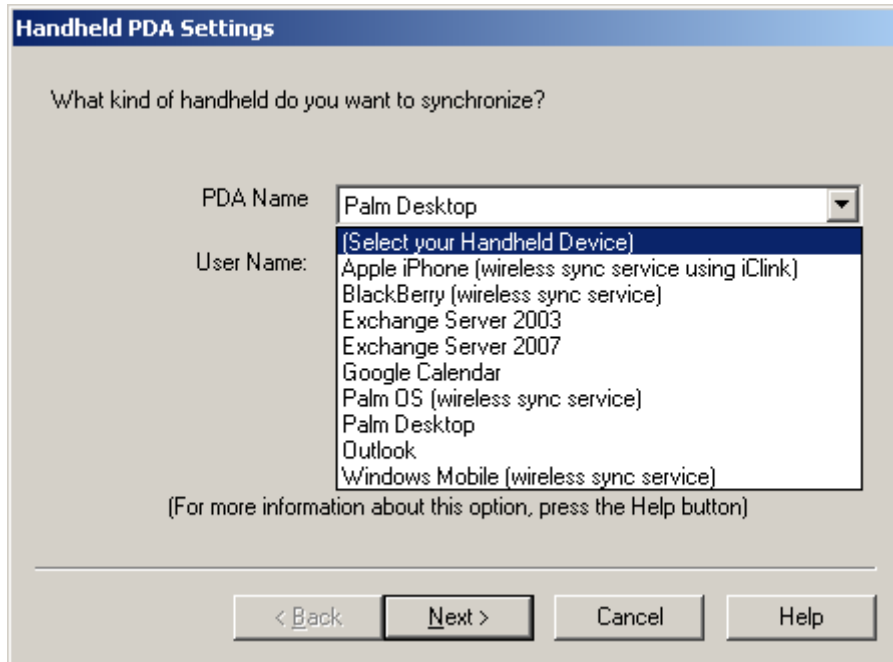
(NOTE: The ACT! login info in the DLE configuration is entered under the ACT! data tab.)

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?

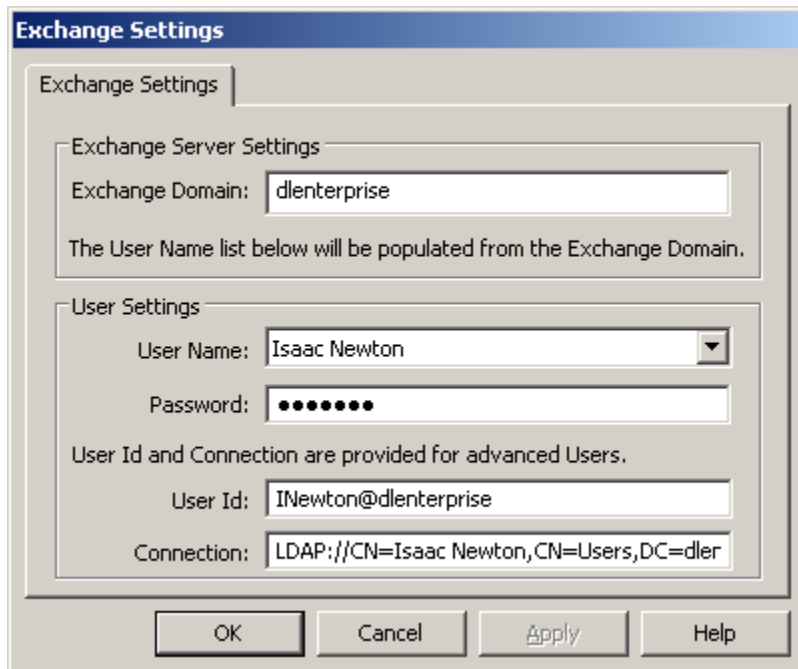
PDA Name: Palm Desktop

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.**



**Exchange Settings**

Exchange Settings

Exchange Server Settings

Exchange Domain: dlenterprise

The User Name list below will be populated from the Exchange Domain.

User Settings

User Name: Isaac Newton

Password: ●●●●●●

User Id and Connection are provided for advanced Users.

User Id: INewton@dlenterprise

Connection: LDAP://CN=Isaac Newton,CN=Users,DC=dler

OK   Cancel   Apply   Help

**User login credentials for Exchange 2003.**

**Exchange 2007 Settings**

Exchange 2007 Settings

Global Exchange 2007 Server Settings

Exchange Domain: domainofsteven.local

Server Name: SBS2008TEST

Authorized User Name: StevenCahill

Password: ●●●●●●●●

Domain and Authorized User are shared for all Exchange 2007 profiles.

The User Name list below will be populated using the parameters above.

User Settings

User Name: Peter Gabriel

User Id: PeterGabriel@domainofsteven.local

Url: https://SBS2008TEST.domainofsteven.local/EWS/Exchange.asmx

OK Cancel Apply Help

**User login credentials for Exchange 2007.**

**Applications**

Note Options	User ID	Memo Info	To Do Map	Datebook Map
Personal Category	Purge and Reload	Phone Format	Timer	
ACT! Data	Secondary	Applications	Category Field	Groups
			Phone Fields	

Please select the applications you would like to transfer

- Address Book
- DateBook
- ToDo List
- Memo Pad

OK Cancel Apply Help

**Customize sync data types for each user**