

XDATA: THE API FOR ACT!

What's an API and what are they good for?

What's an API?

An API (Application Programming Interface) is a set of programming instructions and standards that developers use to access a software application.

Why are APIs useful?

Think of an API as a connector for a software system. This connector is designed to make it very easy for 3rd party developers to build their own product / integrated solutions without having to learn the details of the software and have experience developing for the product. As a result development becomes easier and faster, and the software system becomes significantly more extendable.

Why does ACT! need an API?

- 1. Product Extensibility:** With an API, integration with other databases and processes can be more advanced and provide big efficiency gains. An API removes the need for manual intervention and similar outmoded processes such as import/export and synchronization.
- 2. Make ACT! more broadly available to the development community:** With an API, developing good quality integrations and custom solutions will be faster and easier because developers don't need extensive knowledge of the ACT! SDK (Software Development Kit). As such you have a wider choice of developers, perhaps even your own web developer.
- 3. Many competing CRM products already have an API:** To be competitive with other CRM's such as SugarCRM and Salesforce.com ACT! needs to make integration easier and more accessible. The best way to achieve this is via an API.

How do end users benefit from an API?

Integration with other systems: Most companies today are running their business using a variety of software programs and the need to tie these systems together is becoming increasingly important. The better the API, the more you can integrate the systems and run your business more efficiently.

Take control: Current business processes that interact with ACT! could be complex, time consuming and involve lots of unnecessary paperwork and duplicate data entry. A well-written API would provide you with the tools to redesign that interface into something that better suits your needs.

Engage customers and vendors: If ACT! runs your entire organization the next logical step is to get customers or vendors interacting with your data to improve efficiencies. With a well-written API, you can extend portions of what you do to the web easily and with confidence.

How will ACC's benefit from an API?

- **Access to a wider customer base:** If you're finding that ACT! cannot compete with mid-range CRM systems such as Salesforce.com or Microsoft CRM then an API can allow you to compete with these products. Fundamentally ACT! as a product is more cost effective against these competitors and if you can satisfy the requirements not natively within the grasp of ACT! through the XData API, that becomes your game changer.
- **Serve existing customers better:** Customers that feel they are outgrowing ACT! or require functionality that is not currently available have more options to extend ACT! using the API. As a result they may be less likely to migrate to another system and you can retain them as profitable, long-term customers.

Visit xdata.xactsoftware.co.nz/case-studies to see how the XData API for ACT! is already being used by businesses to improve the way they operate.

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What is XData?

XData is an API for ACT!, built by Xact Software in June 2010. It is designed to enable businesses and developers to leverage the power of ACT! via the Web.

XData makes certain ACT! data and functions available via the web and can also be used to connect 3rd party systems to an ACT! Database without the need to have ACT! installed locally.

Example triggers

- Submit an online form
- Log in to a customer or vendor web portal
- Integration with a 3rd party product/service



Available events

- Display data from your ACT! Contacts, Activities, Opportunities & Custom Tables
- Create or update an ACT! Contact Record
- Create an Activity
- Create an Opportunity
- Send an Email

Trigger

New prospects fill in a form on your website asking you to contact them regarding one of your products/services.

Customers log in to a web portal via your website.

Service/support staff log the details of a job on-site via an online form

Event

- A new record is created in ACT! (or if the contact already exists it is updated)
- A new opportunity is created with the products/services listed against it, and
- An activity is scheduled for one of your sales reps to phone the prospect.

- Customers can view & update their ACT! Records
- View upcoming Activities and schedule new Activities
- View past sales (i.e. Closed – Won Opportunities) and the progress of current opportunities (i.e. Stage)

- A new opportunity is created for the customer: it is labelled as 'invoice sent' and the services and costs are listed in the products/services tab
- An email is sent to the customer with a professionally formatted invoice attached
- The activity is cleared automatically

