ACT! by Sage

ACT! by Sage 2008 (10.0)

ACT! by Sage 2008 (10.0) is a feature-rich, robust contact and customer management solution specifically designed to meet the needs of professional sales teams, sales management, and internal IT organizations. Your organization will benefit from centralized contact and customer information, powerful sales productivity tools, and an easy-to-implement, easy-to-maintain solution.

Easy to Implement, Learn, and Use

Unlike many contact and customer management or CRM solutions, ACT! is easy to learn and use because it's designed to work like salespeople work, ensuring end-user adoption. ACT! provides complete information on one screen, a tabbed interface, considerable right-click and one-click functionality, and robust look-up capabilities. With the intuitive layouts and workflows in ACT!, team members can be productive with little to no time spent in training, managers benefit from high levels of user adoption, and support staffs experience minimal requests.

Centralize and Secure Contact Data

ACT! provides a single, central repository for critical contact information captured across your organization, which reduces redundancy and errors, enables improved data control and security, and eases data maintenance tasks. ACT! enables sales teams to access contact details, relationship history, and opportunity information so they can have knowledgeable communications with prospects and customers. It also allows managers to spend more time observing and coaching their teams and less time monitoring data-gathering.

With ACT!, you can set controls, including forced drop-downs, multi-select fields, mandatory fields, and Note and History disablement, so the contact information entered is complete. As a result, the organization will have detailed prospect and customer data and sales management will have the accurate reports they require. And with ACT! you can count on keeping critical contact information when a sales rep leaves, with custom user permissions that enable or disable your team from deleting and/or exporting information to Excel®.

Streamline Daily Functions for Increased Sales Productivity

ACT! delivers a feature-rich solution that streamlines daily functions so your team can focus on selling, not administrative tasks. ACT! provides functionality that allows your sales reps to quickly access information using robust look-ups, stay on top of key deliverables using the Task List and Activity Alarms, generate Instant Quotes[1] from an opportunity, manage groups of related contacts for easier tracking and communications, and communicate more effectively using Mail Merge and preformatted templates. By streamlining required functions throughout the day, your reps will stay productive and focus on the critical task of selling.

#1 SELLING CONTACT AND CUSTOMER MANAGER FOR 20 YEARS

ACT! by Sage is the #1 selling contact and customer manager for professional sales teams that need to improve individual and team productivity and results. With 20 years as the market leader and 41,000 corporate customers, ACT! is renowned for being easy to implement, learn, and use.

Sales professionals and managers can centralize contact and customer data, track sales opportunities, manage daily responsibilities, and effectively communicate with customers and prospects. Although easily personalized by individual sales team members, sales managers can easily access a complete roll-up of all team activities and opportunities. Flexible deployment options enable sales teams to work where they want, ease installation, and drive a low total cost of ownership.

"We use ACT! to track both sales and financial data. One key benefit of the solution is that it has connected these two groups, providing us with a single, central view of all our customers."

Julie Tomlin, chief financial officer
Vermeer-Wisconsin

"None of the other applications we looked at offered the features, the database flexibility, and the customization capabilities of ACT!. Plus, ACT! is the easiest to use."

Margaret Kelly, administrator
Calvis Wyant Luxury Homes

WHAT ACT! VERSION IS RIGHT FOR YOU?

ACT! by Sage is a feature-rich, robust contact and customer manager ideal for individuals and small teams of up to 10 networked users[2], while ACT! by Sage Premium offers a host of functionality specifically designed to meet the needs of larger teams of networked users[3]. With ACT! Premium, you'll receive team features and functionality, including group scheduling and automatic Outlook® calendar sync, advanced opportunity tracking and customization capabilities, and robust reporting options to provide insight into team performance – all improving overall team satisfaction and productivity.

"With ACT!, all of our sales associates have instant access to customer data, allowing them to cater to each customer's unique needs and ultimately close more loans."

Grant Eckstrom, IT director/CIO
Homestead Mortgage

Improve Sales Predictability and Results

Forecast and track sales opportunities for better insight into your pipeline. With ACT!, you can track sales opportunities from initial inquiry through close, using the standard ACT! sales process or a process customized to suit your organization. To view a roll-up of sales opportunities, use the ACT! Dashboard and quickly gauge your pipeline, top 10 opportunities, and more, while managers can use the Dashboard to see how team members are tracking towards targets.

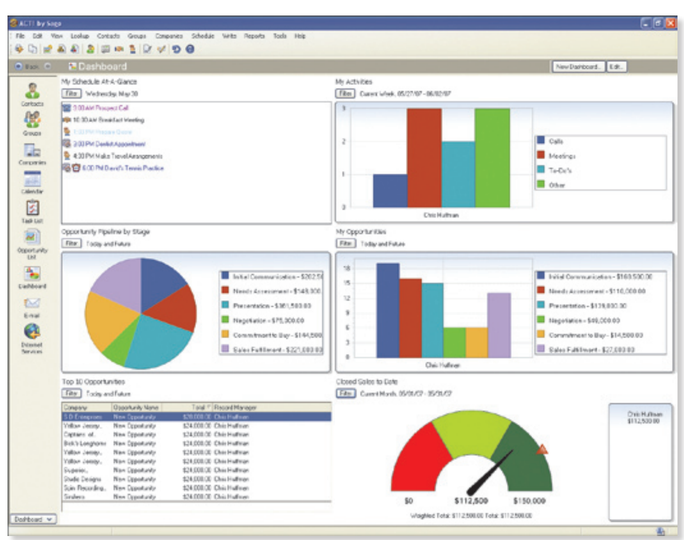
Report on Performance

Using ACT!, sales people can easily report their status and results to management with just a few clicks. Running reports in ACT! is very straightforward using one of more than 40 standard reports, with 20 focused on sales activities. Or, management can create custom reports that better align to the business using the Report Designer. And, most reports can be displayed in Excel, in HTML or PDF format, or e-mailed right from ACT!.

Increase Efficiency with Interactive Dashboards

The ACT! Dashboard provides individual users and managers with a performance snapshot of business-critical information in a single view. It offers a comprehensive, graphical representation of key information in a highly interactive format, so users have the information they need to best tackle their day and be more efficient. Managers can quickly gauge the performance status of all team members to more effectively set individual user and team targets.

With six customizable Dashboard components, users can easily evaluate their day and identify which tasks need to be completed and in what order. Then they can drill down for more detail or to take further action. Managers get the visibility they need to better manage their team without the administrative burden of producing and reviewing multiple reports. What's more, any user or manager can apply filters and view only the information of most interest to them.



The ACT! Dashboard delivers a single, comprehensive view of your activities, accomplishments, and goals.

Six Customizable Components Include:

1. **Schedule At-A-Glance** – View a list of activities for the day, including activity type and time.
2. **My Activities** – Get a handle on important activities and see how your time is allocated.
3. **Opportunities Pipeline by Stage** – See how your sales opportunities are tracking, whether you are using the ACT! Sales Process or one customized to suit your business.
4. **My Opportunities** – Get an at-a-glance view of your sales opportunities.
5. **Top 10 Opportunities** – Quickly view a list of your top sales opportunities.
6. **Closed Sales to Date** – View all closed sales to date for all closed sales opportunities.

Key Capabilities

Organize contacts and leads

- Track contact details, notes and history, appointments and to-do items, documents, and opportunities.
- Populate 60+ pre-defined fields including Name, Company, Phone, Address, Web site, E-mail, and ID/Status, or add your own.
- Attach documents directly into Activities, History, or Documents tabs. Even when you are in Microsoft® Word and Excel, you can attach documents and spreadsheets to ACT! contacts so it's easy to quickly locate presentations, proposals, quotes, and more.
- Create Company Records and view a roll-up of notes, history, and opportunities tied to contacts at those companies.
- Use Groups with 15 levels of hierarchy (14 Subgroups) to easily organize, communicate, and schedule related contacts.

Manage daily responsibilities

- Schedule calls, meetings, and to-dos quickly and easily, and filter each by priority, date range, or user. Access each with five Calendar views including Daily, Weekly, and Monthly, or from the Task List.
- Calendar pop-ups make it easy to view activity details instantly by mousing over any activity for an at-a-glance view.
- Use Activity Alarms to stay on top of deliverables. Incomplete activities roll over to the next day.
- Schedule an activity series for activities with multiple tasks. Activities are linked to one another so a date change in one will realign other activities if appropriate.
- Synchronize your ACT! and Outlook calendars to facilitate appointment scheduling with company employees not using ACT!.
- Utilize ACT! Dashboard components Schedule At-A-Glance and My Activities to get a fast, accurate snapshot of key calls, meetings, and to-dos.

Track sales opportunities

- Use the built-in ACT! sales process or customize the sales process to suit your specific needs.
- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.
- Use the Product List to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price. And, generate instant quotes[1] for any opportunity without having to re-key information.
- View the graphical Sales Pipeline and drill down to see opportunity details.
- Choose from 20+ preformatted Sales Reports or export to Excel with one click for further analysis using built-in, customizable pivot tables.
- Utilize ACT! Dashboard components Opportunity Pipeline by Stage, My Opportunities, Top 10 Opportunities, and Closed Sales to Date for a graphical snapshot of how you're tracking toward metrics.

Communicate more effectively

- Create, send, and track e-mail to/from contacts using the ACT! E-mail Client integrated with Outlook Express or Lotus Notes®, or integrate ACT! directly with Outlook[4].
- Track customer correspondence for a history of all communications with a contact and its organization.
- Quickly identify your last communication with a contact using the Last Communication fields, including Last Reach, Last Attempt, Last Meeting, Last Letter, and Last E-mail fields.
- Write letters in ACT! using Word or the ACT! built-in Word Processor, which supports tables, graphics, HTML, and spell checking. And, use preformatted templates for e-mails, letters, and memos, and easily customize the HTML graphical templates to e-mail customers.
- Select a contact or a group of contacts and perform a Mail Merge to a letter or e-mail.

Gain business insight

- Perform a look-up on most fields or use Keyword Search and ACT! will highlight the keyword in a particular note, history, activity, or opportunity. Or, perform numeric look-ups such as greater than or less than queries.
- Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries. Or, use the Report Designer to create custom reports and send most reports to Excel, HTML, PDF, or e-mail.
- Get a pulse on your business in a single view with comprehensive, graphical representations of key information with the ACT! Dashboard.
- Tailor ACT! to suit your business by customizing Priority, Activity, and History types, allowing for better tracking and analysis.
- Customize layouts, including changing colors, adding logos, and moving relevant field displays for greater visibility.

Access while mobile or remote

- Synchronize your ACT! Calendar, Contact and To-Do information, Notes, and History items to Palm OS®, Pocket PC, Windows® Mobile 5.0, or BlackBerry®[5] devices.
- Print more than 20 templates designed for popular paper organizers so you always have your schedule with you.
- Print from any ACT! calendar template and the contact phone number for any scheduled call is automatically printed on the calendar.
- Access critical contact and customer details through Citrix® or Terminal Services[6] when out of the office.

"We love Outlook integration for calendars. Those using ACT! can synchronize with others in the organization who use Outlook, but not ACT!. This saves significant time by removing the need to make multiple phone calls or send e-mails in regard to scheduling."

Rita Johal,
community relations project coordinator
Pathways Home Health

For more information about ACT!:

- Call 1-888-855-5222
- Contact your ACT! Certified Consultant
- Visit www.act.com

Use As-Is or Customize to Suit Your Team

ACT! can be used as-is or highly customized to fit your sales reps' expectations, while still allowing for the accurate reporting you need to manage your team. Individuals can filter data in the Dashboard view while teams can add fields and tabs as needed. Customize the layout by changing colors or adding your logo, or by adding custom priority, activity, and history types. The individuals' ability to personalize ACT! and the customization capability at the organizational level drive user adoption, provide consistent information and reports needed by management, and reduce administrative burden on IT.

Integrate with Existing Applications

ACT! improves sales team productivity by integrating with existing applications such as Microsoft Outlook e-mail and calendar, Word, and Excel, plus accounting solutions, allowing individuals to work the way they want within applications they already know. In addition, this enables your organization to leverage existing technology investments and keep everyone productive.

1 *Requires Microsoft Excel and Word 2002, 2003, or 2007.*
2 *You must purchase one license of ACT! per user.*
3 *Published minimum system requirements are based on single user environments. Actual scalability and number of networked users supported will vary based on hardware and size and usage of your database. Sage Software scalability recommendations are based on in-house performance tests using the recommended server system requirements found at: www.act.com/2008systreq. You must purchase one license of ACT! per user.*
4 *During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with ACT. ACT! must be added as an Outlook address book to use this feature.*
5 *Requires additional purchase.*
6 *Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.*

Important Note for all customers: Sage Software recommends you carefully review all ACT! system requirements at www.act.com/2008systreq to ensure your system meets these requirements. **Compatibility with ACT! Solutions:** ACT! 2008 cannot be used in conjunction with ACT! Premium 2008 (EX or ST Edition) or ACT! Premium for Web 2008 (EX or ST Edition). When used in standalone environments, ACT! Premium and ACT! Premium for Web solutions are only compatible with their respective same editions. When used in conjunction with each other, ACT! Premium and ACT! Premium for Web editions must be the same. **Regarding ACT! for Palm OS®:** ACT! 2008 (10.0) solutions are not compatible with ACT! for Palm OS® 2.0. **Regarding ACT! Link for use with QuickBooks:** ACT! Link for use with QuickBooks 3.x is not compatible with Windows® Vista™. **Regarding ACT! Add-on Solutions:** Certain ACT! add-on solutions may not be compatible with ACT! 2008 solutions. Please visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

About ACT!

The #1 selling contact and customer manager for 20 years, ACT! by Sage enables individuals and teams involved in selling or other contact-driven roles to improve productivity by helping them organize contact information, manage daily responsibilities, and communicate more effectively. With contact details at their fingertips, they can focus on what's important to their business - building stronger customer relationships. ACT! is easy to learn and use, customizable, and affordable for small businesses. With more than 2.7 million individual users and 41,000 corporate accounts in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.

SAGE 360°

End-to-end solutions. Expert advice. Premium support. That's Sage 360º.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

sage software

Your business in mind.

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