

# ACT! | Product Brief

## #1 Selling Contact and Customer Manager

ACT! by Sage is the #1 selling contact and customer management solution used effectively by 2.8 million users, including individual professionals, small business owners, and anyone who regularly works with contacts. With ACT!, you will benefit from ultimate productivity gains by working smarter and faster so you have time to focus your attention on business-critical activities, provide a differentiated experience because you are armed with knowledge about the intricate needs of your contacts, and make important decisions with confidence to move your business forward. You will quickly reap these benefits because ACT! provides you with an intuitive interface, making it easy to learn and use. Start using ACT! out-of-the-box or fully customize it with ease to fit the exact specifications of your business. And with integration options available for Microsoft® Office and popular accounting solutions, you can continue to work the way in which you are accustomed, while still realizing the benefits associated with using ACT!. Choose ACT! today and accomplish tasks crucial to the success of your business.

### Keep All Your Important Relationship Details in One Place

Centrally organize your important relationship details so you can quickly access information you need, instead of relying on written Post-it® Notes, multiple Excel® spreadsheets, or worse—your memory. Populate 60+ pre-defined fields for your prospects and customers, including Contact, Company, Phone, Address, Web site, E-mail, and ID/Status, or add your own. For each contact you keep in ACT!, enter Activities, Opportunities, History, Notes, Documents, Secondary Contacts, and more. If this data exists in another system, simply import it to keep everything in ACT!. Because all the details are in ACT!, you impress contacts with your knowledge about their unique circumstances and strengthen your relationships.

### Find the Exact Relationship Details You Need Instantly

With multiple search options available, including lookups and advanced queries, it's easy to find data. For instance, search for all contacts in Arizona or build more advanced searches such as all contacts in Arizona marked as leads. Use right-click functionality on all fields to perform a search from that location and on that entity. And get back to any search you conducted previously by viewing the last several contact lookups. With so many options available to you, you get the exact information you need, without delay.

### BENEFITS SNAPSHOT

Be more productive by keeping your contact details in ACT! and managing your meetings and to-dos.

Set yourself apart in the minds of your contacts by delivering timely communications with ACT! and impressing contacts with your relationship knowledge.

Make informed decision by guiding your leads through to close in ACT! and viewing progress with dashboards and reports.

Start reaping the rewards of ACT! immediately because it is easy to learn and easy to use.

Use ACT! out-of-the-box or fully customize it to fit your exact needs.

Integrate ACT! with the applications you use everyday, like Microsoft Office and popular accounting solutions.



**“There’s no question that we’re being more productive. We’re working more on those opportunities that are most productive for us. ACT! has been instrumental in helping us pursue those leads.”**

--- Larry Schottenstein  
Buyer’s Agent Real Estate

## Manage Daily Responsibilities and Improve Productivity

Schedule and track activities within ACT! so important calls, meetings, and to-dos are not overlooked. You have multiple options for managing your day, week, or month using one of many calendar views, the Task List for filtering a view of all activities, and the Dashboard which provides a graphical, summary view of your schedule and scheduled tasks. If you work in Microsoft Outlook®, copy your ACT! and Outlook calendars automatically to keep activities up-to-date on both calendars. Ensure you stay on top of your deliverables by setting Activity Alarms. Any activities not completed roll over to the next day.

Further, schedule an Activity Series to automate redundant tasks for routine activities you perform using multiple steps. Because activities in an Activity Series are linked, a due date change to one will realign related activities, helping you to become more productive. All activities are linked to associated contacts so you can determine which contacts require the most time and bill them accordingly. With ACT!, you will realize the benefits of being productive all day, every day

## Communicate Consistently So You Are Always Top of Mind

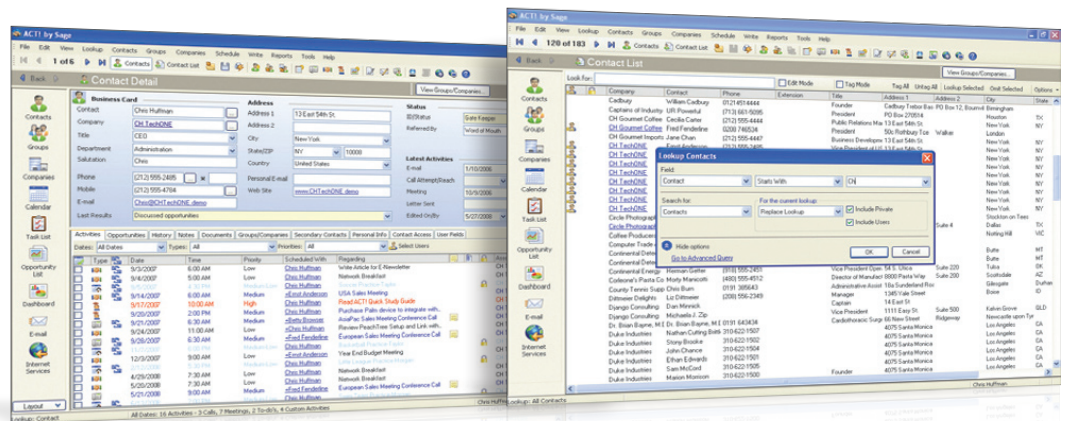
If you work in Outlook, integrate ACT! with Outlook e-mail for sending and receiving all communications. Or, utilize the ACT! E-mail Client by itself or integrated with Lotus Notes® or Outlook Express. However you prefer it, integrating ACT! with your current e-mail solution enables you to work the way you are most accustomed, but also track vital information in ACT! for easy referencing later. The date of the last e-mail you send will appear on the main Contact Detail view to ensure you are reaching out to your contacts with the appropriate frequency. Rely on ACT! to help you track all your communications, no matter which e-mail option you choose.

Send professional marketing communications by using time-saving preformatted templates for HTML, e-mails, letters (including envelopes and labels), and more. Or, for more personal communications, customize templates with your own content and branding, using Microsoft Word or the ACT! Word Processor. Reach out to multiple prospects and customers in just a few short steps with Mail Merge for both e-mail or paper correspondence. Since these communications are linked to each corresponding contact, you have a complete record of sent communications.

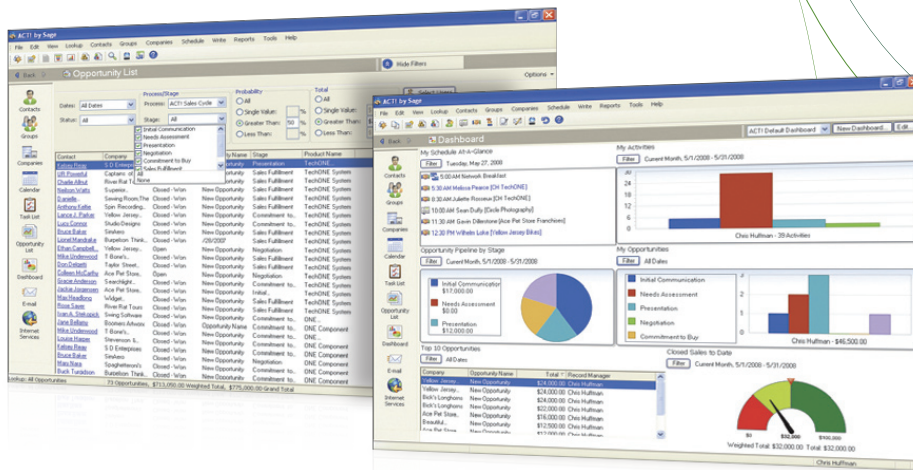
## ARE YOU USING PAPER -BASED METHODS, SPREADS HEETS, OR E-MAIL SYSTEMS TO MANAGE YOUR CONTACTS?

If so, you are probably spending too much time searching for the information you need. Choose ACT! and provide superior service to your prospects, customers, or anyone you contact regularly because you have a complete, integrated view of your relationships—all in one easy-to-access location.

Keep your contact details in one place and view those details with ease directly from the main ACT! view. See all associated Activities, Opportunities, History, Notes, and more.



Find the exact relationship details you need instantly with lookups and advanced queries.



- Ensure no lead is dropped by using the ACT! sales process or a process you customize to suit your business and selling style for managing leads each step of the way.
- Interactive dashboards provide a comprehensive summary view of your top priorities and sales opportunities, enabling you to monitor how you are tracking to your goals.

### Monitor Your Leads from First Interaction Through Close

Ensure no lead is dropped by using the ACT! sales process or a process you customize to suit your business and selling style for managing leads each step of the way. When working a sales opportunity, schedule a follow-up activity which is populated automatically with the opportunity details—ensuring all tasks are covered as a lead moves through the sales process. And track products on each sales opportunity, specifying product discounts and costs for each item. In doing so, you can generate Instant Quotes<sup>1</sup> without having to enter additional information.

### Gain Insight into the Performance of Your Business

Interactive dashboards provide a comprehensive summary view of your top priorities and sales opportunities, enabling you to monitor how you are tracking to your goals. Set the Dashboard as your default startup view and begin your workday with a snapshot of this information to understand your priorities for the day.

For a complete view of your sales pipeline, view the Dashboard or run one of 20 preformatted sales reports to better understand which sales are tracking to close this month, quarter, or year and where to focus your attention in the coming days or weeks.

For more detail on your overall business performance, run one of 40 preformatted reports, including Activity Reports, Relationship History, Sales Summaries, and more. Or, send most reports to Excel, HTML, PDF, or e-mail for further analysis. Having a comprehensive overview enables you to understand all aspects of business performance and make informed decisions.

### Easily Customize ACT! to Fit Your Unique Business Requirements

Tailor ACT! to capture the data you require. Using the ACT! Layout Designer, add fields and tabs and designate field types (including Date, Currency, Yes/No, Expansive Memo, and Picture) with simple point-and-click technology. Customize ACT! to fit the look of your business by changing layout colors and inserting your logo. Because ACT! can be so highly customized, it is an effective solution for anyone who regularly works with contacts, no matter what industry, as it allows you to track the most basic contact details or complex, specialized information.

### DO YOU HAVE A GROWING TEAM?

Consider ACT! Premium Solutions which are specifically designed to benefit larger teams.<sup>2</sup> With ACT! Premium Solutions, you and your team benefit from increased data sharing capability, group scheduling functionality, advanced opportunity tracking and customization capabilities<sup>3</sup>, robust dashboards and reports, security on multiple levels, and more. And with online, offline, and mobile options, you have anywhere access whether office-based, traveling, or remote.

**“Every day more prospects are becoming customers and they are taking the time to describe how good they feel about the service we provide. This tells me ACT! is the right tool to help VazCom Communications succeed and grow. It is embedded in our organization and cannot easily be replaced.”**

--- Jose Vazquez  
VazCom Communications

**“It’s an invaluable tool for our business. We’re able to manage thousands of contacts, merge documents to Groups, and keep History and Notes for every contact. If we had to go to the file cabinet or call people to see if they’re available to meet, I can’t imagine how much time and energy we’d waste. We do it all in ACT!”**

--- Gordon Rogers, Gordon Rogers Architecture

## FEATURES

<b>Contact and Customer Management</b>	Keep all your important relationship details in one place for quick, organized access to the information you need.
<b>Intuitive Interface</b>	Get up-to-speed quickly and remain productive because ACT! provides you with an intuitive interface, making it easy to learn and use.
<b>Lookups and Searching</b>	Find the exact relationship details you need instantly using powerful search capabilities in an easy-to-use format.
<b>Calendar and Activity Management</b>	Manage your daily responsibilities by scheduling and tracking activities within ACT! so important calls, meetings, and to-dos are not overlooked.
<b>Prospect and Customer Communications</b>	Communicate consistently and successfully so you are always top of mind with your prospects and customers.
<b>Sales Opportunity Management</b>	Monitor your leads from first interaction through close and ensure no lead is dropped.
<b>Dashboards and Reporting</b>	Gain instant insight into the performance of your business using dashboards and reports for more informed decision making.
<b>Customization</b>	Easily customize ACT! to fit your unique business requirements and ensure you are capturing the exact data you require.
<b>Anywhere Workforce</b>	Remotely access relationship details, along with your schedule, for the information you need, when and where you need it.
<b>Integration</b>	Integrate ACT! with the applications you use every day, including Microsoft Office and popular accounting solutions, to work the way in which you are accustomed.

### About ACT!

The #1 selling contact and customer manager for over 20 years, ACT! by Sage continues to dominate the market by bringing the latest, most intuitive technology to businesses around the world. ACT! is used by 2.8 million users and 43,000 corporate customers, including individual professionals, small business owners, selling professionals and corporate teams who are fanatical about the benefits they receive from using ACT!. With ACT!, you, too, can be productive on a scale like you have never known before, set yourself apart in the minds of your contacts, and make more informed decisions about your business. And you can accomplish it all from anywhere using seamless online and offline options, plus mobile access solutions.

### About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Important Note: Sage Software recommends you review ACT! 2009 Solutions system requirements at [www.act.com/2009systreq](http://www.act.com/2009systreq) to ensure you meet these requirements. Compatibility: ACT! cannot be used in conjunction with ACT! Premium Solutions. ACT! Premium Solutions are only compatible with their respective same editions. Add-on Solutions: Visit [www.act.com/2009systreq](http://www.act.com/2009systreq) or check with your add-on product provider to determine compatibility.

<sup>1</sup> Requires Microsoft Excel and Word 2002, 2003, and 2007.

<sup>2</sup> Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at [www.act.com/2009systreq](http://www.act.com/2009systreq) are based on single user environments. You must purchase one license of ACT! per user.

<sup>3</sup> In ACT! Premium for Web, administrative functions must be performed on the Web server.