

## Feature-Rich, Scalable Contact and Customer Manager

ACT! by Sage Premium Solutions (ACT! Premium and ACT! Premium for Web) are feature-rich, scalable<sup>1</sup> contact and customer management solutions used effectively by 43,000 corporate customers, including sales professionals and teams. With ACT!, you and your team will benefit from ultimate productivity gains and a comprehensive, integrated view of your relationships so you can provide a differentiated experience. Management will benefit from instant visibility into team performance to ensure targets are being met. Because ACT! is easy to implement, administrators can deploy ACT! quickly, set security, and make customizations to fit organizational requirements, with little technical knowledge. Once deployed, users begin reaping the benefits of ACT! immediately because it is easy to learn and use—driving adoption. And because ACT! offers online, offline, and mobile access options, you and your team will have anywhere access whether office-based, traveling, or remote. Take advantage of this powerful functionality today and accomplish tasks crucial to the success of your organization.

### Centralize Prospect and Customer Relationship Details

Track detailed contact information, including notes, history, activities, sales opportunities, and documents—all tied to the associated Contact Record for a complete, integrated view. Even track Companies with associated multiple contacts or groups of related contacts for easier communicating. Manage interactions at the company or account level for a complete view of relationships with that organization. You and your team get accurate, detailed information about contacts, impressing prospects and customers with your knowledge.

### Manage Daily Responsibilities and Improve Productivity

Manage individual and team schedules and tasks for the day, week, or month using one of many calendar views; the Task List for a filterable view of all activities; and the dashboard for a graphical summary view. If your organization uses Microsoft® Outlook®, copy ACT! and Outlook calendars automatically<sup>2</sup> to keep activities up-to-date in both schedules.

Stay on top of deliverables by setting Activity Alarms. Any activities not completed roll over to the next day. Schedule an Activity Series<sup>3</sup> to automate redundant tasks for routine activities with multiple steps; a due date change to one will realign related activities. Plus, use group scheduling functionality across your team. Enhance overall individual and team productivity all day, every day.

### BENEFITS SNAPSHOT

Use in an individual selling environment or across a team.

As a sales professional, benefit from ultimate productivity gains and a comprehensive, integrated view of your relationships so you can provide a differentiated experience.

As a manager, ensure targets are being met with instant visibility into team performance.

As an administrator, deploy ACT! quickly, set security, and make customizations to fit organizational requirements, with little technical knowledge.

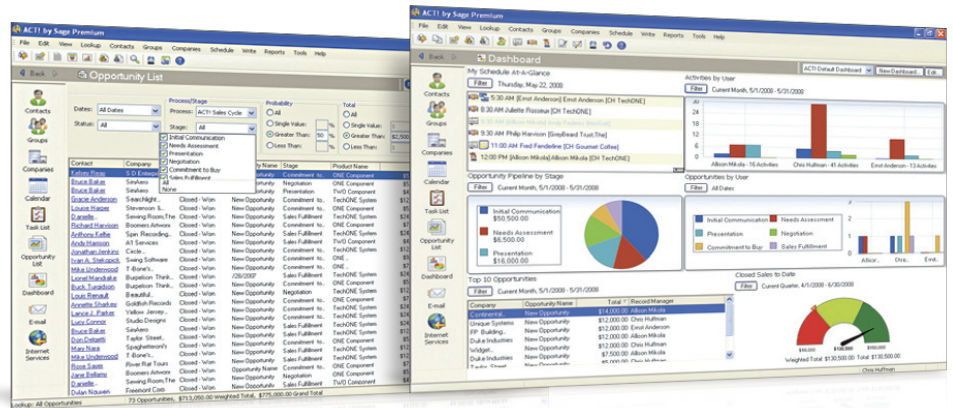
Begin reaping the benefits of ACT! immediately because it is easy to learn and use—driving adoption.

Access ACT! from anywhere, whether office-based, traveling, or remote with online, offline, and mobile options.



**“Prior to implementing ACT! Premium, we had no visibility into our sales pipeline. Now our department is viewed as a leader within the organization—a model of an effective sales and marketing workforce. With ACT! Premium, we are light years ahead.”**

--- Bruce Jensen,  
Transcontinental Printing



- Track sales opportunities from initial inquiry through close, utilizing the ACT! sales process or a process customized to suit your team’s selling philosophy for managing leads.
- Interactive Dashboards provide you and your team with a comprehensive summary view of top priorities and sales opportunities, and enable managers to monitor performance status.

### Forecast and Track Sales Opportunities

Track sales opportunities from initial inquiry through close, using the ACT! sales process or a process customized for your team’s selling philosophy for managing leads. When working a sales opportunity, schedule a follow-up activity (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—even generate Instant Quotes<sup>4,2</sup>—without having to enter additional information.

Get a complete view of sales pipelines by viewing the Dashboard or one of 20 preformatted sales reports for a better understanding of which sales are tracking to close this month, quarter, or year and where to focus attention in the coming days or weeks. With more visibility into sales pipelines, more accurate forecasts are generated for your organization.

### Gain Insight into Individual and Team Performance

Interactive Dashboards provide you and your team with a comprehensive summary view of top priorities and sales opportunities, including a gauge of team targets, and enable managers to monitor individual and team performance. You and your team can set the Dashboard as your default startup view to begin the workday with a snapshot of this information so you understand your priorities for the day.

Managers get more detailed insight into individual and team performance with one of 40 preformatted reports, including Activity Reports, Sales Summaries, and more for each team member or for the team as a whole. Or for further analysis, send most reports to Excel®, HTML, PDF, or e-mail. Managers gauge individual and team performance using team views on the Dashboard and reports specific to each team member, so they can coach underperforming reps without delay.

### ARE YOU USING A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOLUTION TO MANAGE YOUR RELATIONSHIPS ?

CRM builds on the foundation of contact and customer management which means that CRM is comprised of software suites that, in addition to providing relationship management, offer integration of marketing, sales, service, and support functions across your organization. Because of the added functionality, there is typically more of a learning curve associated with CRM. If you and your organization do not have such complex business requirements, you may want to consider ACT! which enables you to manage your relationships successfully, while allowing you to be up and running quickly.

**“None of the other applications offered the features, the database flexibility, and the customization capabilities of ACT! Premium. Plus, ACT! is the easiest to use.”**

--- Margaret Kelly, Calvis Wyant Luxury Homes



- ◆ Sync<sup>2</sup> ACT! to mobile devices for all the power and convenience of ACT! on-the-go. Note: iPhone solution<sup>7</sup> available through CompanionLink Software, Inc.

- ◆ Utilize downloads available on ACT! Dev Net to extend ACT! functionality like the Middle Pane and Document Previewer shown here.

### Share and Secure Details Across Teams

Keep information secure across your organization by setting security options at the Contact, Group, Company, and field levels<sup>5</sup>, marking each as full, read-only, or no access for particular users and teams. Assign up to five security levels and restrict users from deleting and exporting data to keep this information as an organizational asset, even when team members leave. Finally, set password rules to keep data secure from intruders. All this ensures that your organization maintains high security standards for your valuable contact information.

### Deploy and Implement with Ease

Install and deploy ACT! using Silent Install<sup>6</sup> for rolling out the Windows product, establish a link and logins for rolling out the Web product, or provide both for each user. Once installed, setting up teams of users is accomplished quickly using team functions, like grouping team members to grant access and user permissions on multiple levels. In addition, maintaining ACT! and ensuring database health is easy with automatic database functions<sup>3</sup>, including backup, maintenance, and sync, keeping information safe and up-to-date. Implementing and maintaining a solution to manage contact information has never been easier.

### Support an Anywhere Workforce

ACT! is available for use in a standalone or mixed-use environment, allowing administrators to provide a solution that matches how each user in your organization works, and still enjoy the benefits of centralized customer data. Because the Windows and Web products are full-featured ACT! applications, you and your team truly receive seamless access options. Additionally, sync<sup>2</sup> ACT! to Palm OS<sup>®</sup>, Pocket PC, BlackBerry<sup>®7</sup>, and iPhone<sup>7</sup> devices for all the power and convenience of ACT! on-the-go. Or, you and your team can access via Citrix<sup>®</sup> or Terminal Services<sup>8</sup>. With these options, you and your team can be productive wherever you are.

### Enhance the Power of ACT! with Extensibility Options

Utilize downloads available on ACT! Dev Net to extend ACT! functionality or add powerful enhancement solutions designed to expand core ACT! functionality, including e-mail marketing, quoting, analytics, and more—all available through third-party vendors<sup>9</sup>. Administrators with advanced technical skills can also make enhancements to ACT! with the ACT! Software Development Kit (SDK), OLEDB Provider, ACT! Reader, and SA Password tools.

### ARE YOU AND YOUR TEAM SCATTERED AMONG DIFFERENT OFFICES, WORKING REMOTELY, AND TRAVELING FREQUENTLY?

Consider using both ACT! Premium and ACT! Premium for Web Deployment and use of both solutions provide you and your team with real-time access to important prospect and customer relationship details, whether you are office-based, traveling, or remote.

**“With ACT! Premium, we always know exactly what opportunities are open, what stage they’re in, and what the probability of closing them is. Not only does this help our sales team, but we use it to more accurately forecast our production and manufacturing.”**

--- John Hrabosky  
Earth Tool

## FEATURES

<b>Contact and Customer Management</b>	Centralize important prospect and customer relationship details for quick, organized access.
<b>Company Management</b>	Manage interactions at the company or account level for a complete view of relationships with that organization.
<b>Intuitive Interface</b>	Get up-to-speed quickly and remain productive with ACT! because of the easy to learn and use interface—eliminating the need for formal training.
<b>Lookups and Searching</b>	Find specific relationship details instantly using powerful search capabilities in an easy-to-use format.
<b>Calendar and Activity Management</b>	Manage daily responsibilities by scheduling and tracking activities within ACT! to ensure individual and team productivity.
<b>Sales Opportunity Management</b>	Forecast and track sales opportunities to stay on top of all new leads and to provide management with insight into sales pipelines.
<b>Dashboards and Reporting</b>	Gain instant and accurate insight into individual and team performance using Dashboards and reports.
<b>Prospect and Customer Communications</b>	Communicate consistently and successfully with prospects and customers using Outlook or other e-mail solutions used by your organization.
<b>Data Sharing and Security</b>	Share and secure precious prospect and customer relationship details across teams of users.
<b>Codeless Customization</b>	Easily customize ACT!, with little technical knowledge required, to fulfill the requirements of your organization and to ensure adoption.
<b>Administration</b>	Deploy and implement ACT! quickly and maintain with ease.
<b>Anywhere Workforce</b>	Support an anywhere workforce with Windows, Web, and mobile access options.
<b>Integration</b>	Integrate ACT! with the applications already used by your organization to make the most of existing technology investments.
<b>Extensibility</b>	Enhance the power of ACT! with extensibility options available to administrators.

**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.actsolutions.com](http://www.actsolutions.com) or check with your add-on product provider to determine compatibility.

<sup>1</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>2</sup> This feature is not available in ACT! Premium for Web.

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

<sup>4</sup> Requires Microsoft Excel and Word 2002, 2003, and 2007.

<sup>5</sup> Limited access group and company names will be viewable from the tree view, but all associated information will remain inaccessible.

<sup>6</sup> Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate. Silent Install on Windows Vista® requires additional configuration.

<sup>7</sup> Requires additional purchase.

<sup>8</sup> Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0, 4.0, and 4.5.

<sup>9</sup> Sage Software is in no way liable or responsible for any claims made related to products or services provided by third-party vendors.