



ACT! by Sage Premium 2008 (10.0) Solutions

ACT! by Sage Premium 2008 (10.0) solutions are feature-rich, robust contact and customer management solutions 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. The ACT! Premium platform offers Windows® and Web-based solutions, plus ACT! by Sage Premium Dual Access, which includes both Windows and Web access for each user.

Easy to Implement, Learn, and Use

Unlike many contact and customer management or CRM solutions, ACT! Premium solutions are easy to learn and use because they're designed to work like salespeople work. ACT! Premium solutions provide complete information on one screen, a tabbed interface, lots of right-click¹ and one-click functionality, and robust look-up capabilities. With ACT! Premium solutions, managers will spend little or no time training team members, and will enjoy high levels of user adoption with minimal requests to help desk or support staff.

ACT! Premium solutions are easy to install and administer, reducing the burden on internal IT organizations. Set up your users on either Windows or Web-based platforms depending on their needs. For Windows users, utilize Silent Install² to install, activate, and register ACT! Premium on the server, and then push the deployment of ACT! Premium to different users on the network, eliminating the need to install software on individual machines. Or, deploy ACT! Premium using Citrix® or Terminal Services.³ For Web users, configure ACT! Premium for Web on a centralized server, provide users with a login and URL, and they will be up and running in no time!

Centralize and Secure Contact Data

ACT! Premium solutions provide 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! Premium solutions enable sales teams to access contact details, relationship history, and opportunity information so they can have knowledgeable communications with prospects and customers. With ACT! Premium you can set controls, including forced drop-downs, multi-select fields, mandatory fields, and Note and History disablement, so managers can rest assured that the contact information entered is complete. As a result, your organization will have detailed prospect and customer data and sales management will have the accurate reports they require.

In addition, ACT! Premium solutions allow you to keep contact information more secure with advanced user, contact, and field level security features. And for ongoing database health, automatic database functions include synchronization, backup, and maintenance—reducing the administrative burden on internal IT.⁴

#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.

"ACT! is bringing our sales teams together. It's impossible to put a price tag on the value it brings to our organization. ACT! helps our team members at multiple global operating and sales facilities work as one united group."

Greig A. DeSautel, director of strategic information
Acument Global Technologies

“Everyone is comfortable with the intuitiveness of ACT!. It really is easy to use. Even our newest users get it right away without requiring training.”

Gordon Rogers, principal
Gordon Rogers Architecture

FLEXIBLE DEPLOYMENT OPTIONS

ACT! Premium solutions offer flexible deployment options, including Windows, Web-based, and mobile access, so sales teams can work wherever they are and always have accurate opportunity information close at hand. In addition, ACT! Premium Dual Access enables users to access critical customer and opportunity information from the office, home, or from the road using either a Windows application or via a Web browser—for one low price. ACT! Premium Dual Access delivers the tools to increase your sales team’s productivity while providing your organization with scalability,⁷ centralized administration, advanced security, and flexible deployment and access options required to drive your business.

ACT! Premium Dual Access includes ACT! Business Care,⁸ an exceptional maintenance service plan that includes priority access to senior product support specialists as well as product upgrades and updates,⁹ all ensuring the best possible experience for your organization.

“Sales representatives appreciate having one system that tracks all our important customer data. I like that it keeps our data accurate and secure.”

Cindy McCormack, senior vice president
United Business Machines

Streamline Daily Functions for Increased Sales Productivity

ACT! Premium solutions streamline daily functions so your sales team can focus on selling, not administrative tasks. Quickly access information using robust look-ups, stay on top of key deliverables using the Task List and Activity Alarms, generate Instant Quotes⁵ from an opportunity, manage groups of related contacts for easier tracking and communications, and communicate more effectively using Mail Merge⁶ and preformatted templates. By streamlining required functions throughout the day, your team will stay productive and focused on the critical task of selling.

Improve Sales Predictability and Results

Forecast and track sales opportunities for better insight into your pipeline. With ACT! Premium solutions, you can track sales opportunities from initial inquiry through close using the standard ACT! sales process or a process customized⁶ to suit your organization. View a roll-up of sales opportunities to quickly gauge your pipeline and top opportunities, while your managers can see how team members are tracking toward targets. Managers can get a more detailed view of the sales pipeline by choosing from more than 40 total reports, including 20 preformatted sales reports, or developing a report that closely reflects the unique goals of the business.

Increase Efficiency with Interactive Dashboards

The ACT! Premium 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! Premium Dashboard delivers a single, comprehensive view of a sales organization’s activities, accomplishments, and goals.

Six Customizable Dashboard Components Include:

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

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.
- 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 hierarchy¹⁰ (14 Subgroups) to easily organize, communicate, and schedule with 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 multiple Calendar views.
- 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.
- Use Group Scheduling for at-a-glance user availability¹⁰ for everyone in the database and to manage and define resources.
- Synchronize ACT! Premium and Outlook calendars automatically¹⁰ to facilitate appointment scheduling with company employees not using ACT! Premium.
- Use ACT! Premium Dashboard components, Schedule At-A-Glance and Activities by User, to provide you and your team 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 process⁴ 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.
- Customize opportunity field names, as well as field types, in order to capture the most accurate sales and opportunity information.⁴
- Use the Product List¹¹ to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price.
- View the graphical Sales Pipeline and drill down to see opportunity details.
- Choose from preformatted Sales Reports or export to Excel with one click for further analysis using built-in, customizable pivot tables.
- Utilize ACT! Premium Dashboard components Opportunity Pipeline by Stage, Opportunities by User, Top 10 Opportunities, and Closed Sales to Date for a graphical snapshot of how you and your team are tracking toward metrics.

Communicate more effectively

- Create, send, and track e-mail to/from contacts using ACT! E-mail Client integrated with Outlook® Express or Lotus Notes®, or integrate ACT! Premium directly with Outlook.¹²

- 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! Premium using Word or the ACT! built-in Word Processor which supports tables, graphics, HTML, and spell checking. And, use pre-formatted templates for e-mails, letters, and memos, and easily customize¹¹ the HTML graphical templates to e-mail customers.
- Select a contact or a group of contacts and perform a Mail Merge⁶ to a letter or e-mail.

Gain business insight

- Perform a look-up on most fields or use Keyword Search and ACT! Premium will highlight the keyword¹ in a particular note, history, activity, or opportunity.
- Perform numeric look-ups such as greater than or less than queries and easily edit a row or rows within the query¹⁰ to better suit your search needs.
- Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries. Or, use the Report Designer¹¹ to create custom reports and send most reports to Excel, HTML, PDF, or e-mail.
- View, manage, and report on activities by user, providing administrators and managers insight into activities initiated and completed by users.
- Get a check of your team’s performance and your business in a single view with the ACT! Premium Dashboard.
- Tailor ACT! Premium to suit your business by customizing Priority, Activity, and History types allowing for better tracking and analysis.⁴
- Customize layouts, including changing colors, adding logos, and moving relevant field displays for greater visibility.⁴

Accommodate large teams⁷

- Assign up to five security levels, including Manager and Restricted, to all users, to allow different access to data and features depending on user levels.
- Maintain database security with custom user permissions per user, enabling or disabling them from deleting and/or exporting to Excel.
- Ensure up-to-date customer information with automatic database synchronization, backup, and maintenance.⁴
- Keep data more secure with the ability to set password rules including Password Expiration Options, Complexity of a Password, and Password Re-use.
- With Silent Install,² easily deploy ACT! Premium to multiple users. Administrators can pre-select preferences to ensure all users receive the same settings and desired configuration.

Access while mobile or remote

- Use ACT! Premium for Web for anytime, anywhere access.
- Synchronize your ACT! Calendar, Contact and To-Do information, Notes, and History items⁹ to Palm OS®, Pocket PC, or BlackBerry®¹³ devices.
- Print from any ACT! Premium 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 Services³ when out of the office.

“Out of the box, ACT! provides a rich set of features, but it’s flexible. You can use it as simply or as sophisticated as you want.”

Robert Joyner, sales technology manager
Countrywide Home Loans, Inc.

Implement As-Is or Customize to Suite Your Unique Needs

As simple or as complex as your organization needs, ACT! Premium solutions can be used as-is or highly customized¹¹ without extensive involvement from IT. For example, add fields and tabs as needed, customize the layout by changing colors or adding your logo, or add custom priority, activity, and history types to track unique items important to your business.

This easy customization capability, at both the individual user and organization level, will help drive user adoption within your organization; provide consistent, tailored information and reports for decision-making; and reduce organizational dependence on IT to tailor the solution, freeing them for more business critical tasks.

For more information about ACT! Premium Solutions:

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

- 1 In ACT! Premium for Web, this feature may behave differently.
- 2 Delivered as an MSI package. Software to distribute 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, please see ACT! Online Help for more detail.
- 3 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.
- 4 In ACT! Premium for Web, this operation must be performed on the Web server.
- 5 Requires Microsoft Excel and Word 2002, 2003, and 2007.
- 6 In ACT! Premium for Web, mail merge functionality is available using the ACT! Word Processor, but not using Microsoft Word.
- 7 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.
- 8 Your ACT! Business Care Plan (which includes product upgrades, product updates and customer support) will be renewed automatically each year on the anniversary date of your purchase, at the then current renewal price, unless you terminate your agreement prior to that date. Renewal is not required for continued access to product updates.
- 9 Product upgrades include an upgrade to ACT! by Sage Premium and ACT! by Sage Premium for Web for one year from the date of purchase. Access to support is available for one year from the date of purchase. See www.act.com/support/DualAccess for more information.
- 10 This feature is not available in ACT! Premium for Web.
- 11 In ACT! Premium for Web, customizations must be performed on the ACT! Premium for Web server.
- 12 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.
- 13 Requires additional purchase.

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.act.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.



End-to-end solutions. Expert advice. Premium support. That’s Sage 360®.

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.

