



Choose the Functionality That Best Fits Your Business

Check out the robust features in ACT! by Sage and ACT! by Sage Premium Solutions to find out which solution meets your needs. Then call 1-866-903-0006, contact your ACT! Certified Consultant, or visit www.act.com to order ACT! today!

	ACT! 2009 (11.0)	ACT! Premium Solutions 2009 (11.0)
Contact and Customer Management		
Maintain contact details, notes, history, activities, opportunities, documents, secondary contacts, and more on Contact Records	✓	✓
60+ pre-defined fields	✓	✓
Duplicate checking and the ability to merge records	✓	✓
Unlimited date- and time-stamped Notes and History	✓	✓
Share Notes and History between multiple contacts	✓	✓
Attach documents to Contacts, Notes, and Activities	✓	✓
Track related contacts as Groups and Subgroups	✓	✓
Add or remove contacts for Groups and Subgroups automatically based on criteria you specify	✓	✓
View Groups and Subgroups in tree views	✓	✓
Track contacts, notes, history, activities, opportunities, documents, addresses, and company information on Group Records	✓	✓
Context-aware services, including driving directions	✓	✓
Company Management		
Track Companies and Divisions	✓	✓
Add or remove contacts on Company Records automatically based on criteria you specify	✓	✓
View Companies and Divisions in tree views	✓	✓
Track contacts, notes, history, activities, opportunities, documents, addresses, and company info on Company Records	✓	✓
Specify linked fields between Company and Contact Records ¹	✓	✓
Update contact linked fields from a company	✓	✓
Intuitive Interface		
Tabbed interface for viewing and editing in one place	✓	✓
Right-click ² , one-click functionality	✓	✓
Type-ahead	✓	✓
Multi-select drop-downs	✓	✓
"Layman" verbiage throughout	✓	✓
Setup assistance for configuring preferences	✓	✓
In-context Help, Feature Tours, and documentation in-product	✓	✓
Lookups and Searching		
Central search option	✓	✓
Lookups on all fields	✓	✓
Advanced queries	✓	✓
Contact activity lookup	✓	✓
Opportunity lookups	✓	✓
Document lookups	✓	✓
Save lookups as Groups or Companies	✓	✓
User lookups	✓	✓

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Calendar and Activity Management		
Schedule calls, meetings, and to-dos, plus custom activities	✓	✓
Edit Priority, Activity, and History types	✓	✓
Track activities on Contact Records	✓	✓
Schedule an Activity Series ³ for activities with multiple steps	✓	✓
Multiple calendar views	✓	✓
Filterable Task List view	✓	✓
Activity alarms	✓	✓
Activity rollover	✓	✓
Calendar pop-ups	✓	✓
Outlook® Calendar integration	✓	✓
Automatic ACT! and Outlook calendar copying	✓	✓
Grant calendar access by user	✓	✓
At-a-glance user availability		✓
Manage and define resources		✓
Conflict notification		✓
Sales Opportunity Management		
Built-in or custom sales process with multiple steps	✓	✓
Track product/services, details, and more for each sales opportunity	✓	✓
Automatically track the number of days a sales opportunity has been open	✓	✓
Input Opportunity Date fields		✓
Set sales opportunities as open, closed–won, closed–lost, and inactive	✓	✓
Associate contacts, groups, and companies with each sales opportunity	✓	✓
Generate Instant Quotes ^{4,5}	✓	✓
Filterable Opportunity List view	✓	✓
Schedule a follow-up activity directly from the Opportunity	✓	✓
Export the Opportunity List to Microsoft® Excel®	✓	✓
Prospect and Customer Communications		
ACT! and Outlook e-mail integration	✓	✓
Create activities and contacts from Outlook e-mails	✓	✓
Built-in e-mail with integration options, including Outlook Express and Lotus Notes®	✓	✓
Attach e-mails to contacts	✓	✓
Use preformatted templates for e-mails and letters	✓	✓
E-mail and letter Mail Merge to a contact or groups of contacts	✓	✓
Manage Mail Merge when contact records have missing e-mail addresses	✓	✓
Validate and correct addresses during Mail Merge	✓	✓
Last communication fields, including e-mail, meeting, and more	✓	✓
History of all customer correspondence	✓	✓
Dashboards and Reporting		
Interactive Activity and Opportunity dashboards	✓	✓
Dashboard targets	✓	✓
Copy the dashboard to PowerPoint®	✓	✓
Dashboards with team views		✓
40 preformatted report templates, with 20 focused on sales opportunities	✓	✓
Interactive pipeline report with drilldown capability	✓	✓
Export most reports to Excel, HTML, PDF, or e-mail	✓	✓
Report on activities by user		✓

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Data Sharing and Security		
Share data with up to 10 users ⁶	✓	✓
Share data with 50+ users ⁷		✓
View activities for 10+ users on your ACT! calendar		✓
Report on activities by user		✓
View team memberships		✓
Mark contacts as private	✓	✓
Field level security		✓
Secure notes, history, and opportunities	✓	✓
Company security	✓	✓
Group and Company security ⁸		✓
Five security roles for users	✓	✓
Specify user permissions and access	✓	✓
Password rules	✓	✓
Codeless Customization³		
Layout Designer for editing layouts	✓	✓
Designate field types as Date, Currency, Yes/No, Expansive Memo, and Picture	✓	✓
Remove, edit, or add fields	✓	✓
Add values to drop-downs	✓	✓
Customize menus, toolbars, columns, and the navigation bar	✓	✓
Customize sales processes and stages	✓	✓
Customize Opportunity field names and field types		✓
Drop-downs in Opportunities		✓
Customize the dashboards with the Dashboard Designer ⁹	✓	✓
Customize reports with the Report Designer	✓	✓
Administration³		
Automatic backup	✓	✓
Automatic database maintenance	✓	✓
Automatic synchronization	✓	✓
Silent Install ¹⁰ administration and activation		✓
Automatic install updates		✓
Microsoft SQL Server [®] 2005 Express Edition	✓	✓
Microsoft SQL Server 2005 Express Edition and SQL Server 2005 Standard Edition		✓
Anywhere Workforce		
Mobile devices, including Palm OS [®] , Pocket PC, BlackBerry ^{®11} , and iPhone ^{™115}	✓	✓
Windows or offline access	✓	✓
Web access		✓
Citrix [®] or Terminal Services ¹²	✓	✓
Sync Services		✓
Templates for popular paper organizers for printed schedules	✓	✓

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Integration		
Microsoft Outlook, Word ⁶ , Excel, and PowerPoint integration	✓	✓
Lotus Notes integration	✓	✓
Automatic ACT! and Outlook calendar copying ⁵	✓	✓
Import Outlook and GoldMine ^{®11} contact information	✓	✓
ACT! Premium for Web integration with Internet Explorer [®] and Safari ^{®13}		✓
Connected Back Office⁵		
QuickBooks [®] Professional/Premier	✓	✓
Peachtree by Sage	✓	✓
Simply Accounting by Sage	✓	✓
Sage MAS 90 and Sage MAS 200	✓	✓
Sage BusinessWorks	✓	✓
Extensibility		
ACT! Dev Net for free downloads	✓	✓
ACT! Software Development Kit (SDK)	✓	✓
OleDb Provider, ACT! Reader, and SA Password ¹¹ tools	✓ ¹⁵	✓
Enhancement solutions developed by third-party vendors ^{11 14}	✓	✓

Important Note: Sage Software recommends you review ACT! 2009 Solutions system requirements at 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 or check with your add-on product provider to determine compatibility.

- 1 Not all fields can be linked and linked field types must be compatible.
- 2 In ACT! Premium for Web, this feature may behave differently.
- 3 In ACT! Premium for Web, administrative functions must be performed on the Web server.
- 4 Requires Microsoft Excel and Word 2002, 2003, and 2007.
- 5 This feature is not available in ACT! Premium for Web.
- 6 You must purchase one license of ACT! per user.
- 7 Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at www.act.com/2009systreq are based on single user environments. You must purchase one license of ACT! per user.
- 8 Limited access group and company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 9 In order to edit, add, or remove Dashboard components, you must have an ACT! manager or administrator security role.
- 10 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.
- 11 Requires additional purchase.
- 12 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.
- 13 This feature is only available in ACT! Premium for Web on machines running a Safari browser on a Macintosh[®] OS. The ACT! Word Processor and Microsoft[®] Outlook[®] integration are not available using this feature.
- 14 Sage Software is in no way liable or responsible for any claims made related to products or services provided by third-party vendors.
- 15 Available upon request.

About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 43,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an “anywhere” workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.



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.

Order today!

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- Visit www.act.com

