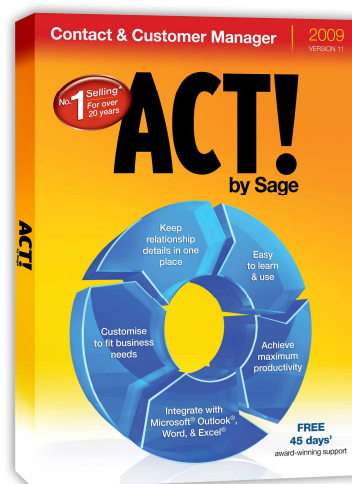




## ACT! by Sage 2009 (v11)

### Key Capabilities and Benefits

- **Keep all your important relationship details in one place** for quick, organised access to the information you need.
- **Manage interactions at the company or account level** for a complete view of relationships with that organisation.
- **Find the exact relationship details you need** instantly using powerful search capabilities in an easy-to-use format.
- **Monitor your daily responsibilities** by scheduling and tracking activities within and be productive all day.
- **Communicate consistently and successfully** so you are always top of mind with your prospects and customers
- **Manage your leads from your first interaction through close** and ensure no lead is dropped.
- **Gain insight into the performance of your business** using dashboards and reports for more informed decision-making.
- **Integrate ACT! with common applications**, including Microsoft® Office, Lotus Notes® and Sage Accounting solutions (Sage Instant Accounts & Sage 50 Accounts)





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

Centrally organise 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 London or build more advanced searches such as all contacts in London marked as leads. Use right-click functionality on all fields to perform a search from that location and on that entity. Get back any search you conducted previously by viewing the last several lookups. With so many options available to you, you can get the exact information you need without delay.

## **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 realise 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, utilise 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, customise 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.

## **Monitor Your Leads from First Interest Through to Close**

Ensure no lead is dropped by using the ACT! sales process or a process you customise 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 (requires MS Excel and Word 2002, 2003 and 2007) 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 start-up 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 Customise 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. Customise ACT! to fit the look of your business by changing layout colours and inserting your logo. Because ACT! can be so highly customised, 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, specialised information.