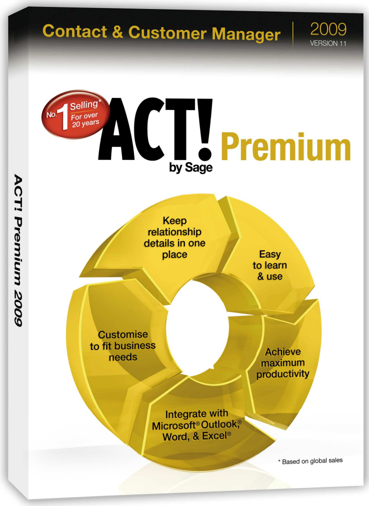
ACT! by Sage Premium 2009 (v11)

Key Capabilities & Benefits



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

Centralise 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 organisation. 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 organisation uses Microsoft® Outlook®, copy ACT! and Outlook calendars automatically (not in Web) 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 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.

Forecast and Track Sales Opportunities

Track sales opportunities from initial inquiry through close, using the ACT! sales process or a process customised 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 (using MS Office)—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 organisation.

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 start-up 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.

Share and Secure Details across Teams

Keep information secure across your organisation by setting security options at the Contact, Group, Company, and field levels, 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 organisational asset, even when team members leave. Finally, set password rules to keep data secure from intruders. All this ensures that your organisation maintains high security standards for your valuable contact information.

Deploy and Implement with Ease

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, 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! Premium Solutions are available for use in a standalone or mixed-use environment, allowing administrators to provide a solution that matches how each user in your organisation works, and still enjoy the benefits of centralised customer data. Because the Windows and Web products are full-featured ACT! applications, you and your team truly receive seamless access options. Additionally, sync2 ACT! to Palm OS®, Pocket PC, BlackBerry® (additional add-on required), and iPhone (additional add-on required) devices for all the power and convenience of ACT! on-the-go. Or, you and your team can access via Citrix® or Terminal Services. With these options, you and your team can be productive wherever you are.

Enhance the Power of ACT! Premium Solutions with 3rd Party Options

Utilise downloads available on ACT! Devolper Network 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. 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.

ACT! Software Development Kit (SDK):
A tool that enables third party developers to build add-ons for ACT!

OLEDB Provider:
Object **L**inking and **E**mbedding **D**ata**B**ase. Provides access to the data stored in applications or databases, in this case the ACT database.

ACT! Reader*:
Available on request and provides the user (for reporting purposes only) to all tables within the database

SA Password*
The **S**ystem **A**dministrator Password is available on request for customers who need to open the database when backing up data to third party tools e.g. Veritas

*requires additional licence agreement