

# Achieve Greater Productivity and Build Better Business Relationships with ACT! by Sage

1 In ACT! Premium for Web, administrative functions must be performed on the Web server.  
2 Requires Microsoft Excel and Word 2002, 2003, and 2007. This feature is not available in ACT! Premium for Web.  
3 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.  
4 You must purchase one license of ACT! per user.

**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.



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# Successfully Advance Your Business with ACT!

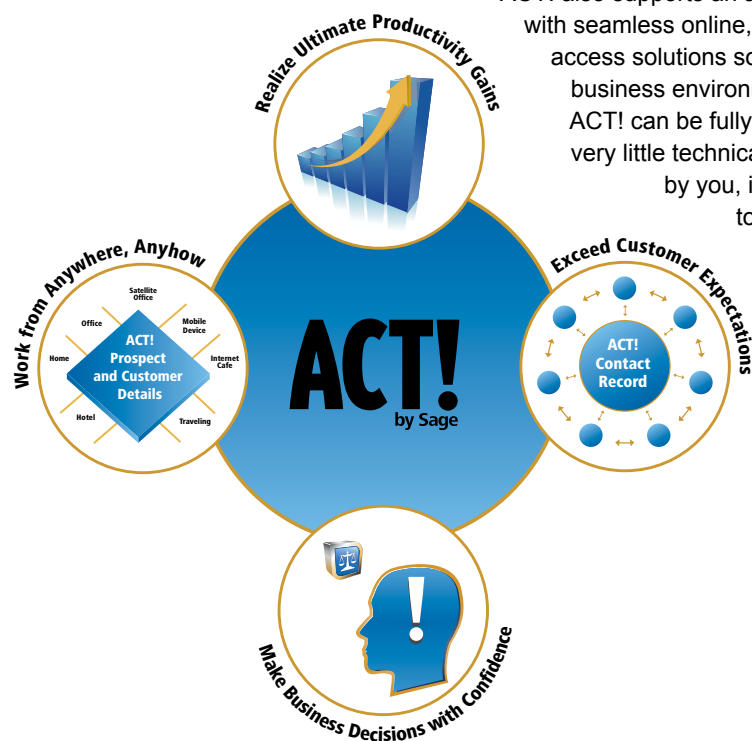
Remaining productive all day, while building strong business relationships is crucial to advancing the success of any business. Imagine following up on new leads without delay or having an immediate answer to a question you are asked by your best customer—even if you are out of the office. It is hard to stay on top of all those details. Or, at least it was. With ACT! by Sage Solutions, you can now accomplish the tasks that are crucial to your success.

## #1 Selling Across the Globe

ACT! is the #1 selling contact and customer management solution that continues to dominate the market by bringing the latest, most intuitive technology to businesses across the globe. Backed by 2.8 million users and 43,000 corporate customers, ACT! users, including individuals, small businesses, selling professionals, and corporate teams, are fanatical about the benefits they receive from using ACT!.

With ACT!, you, too, will realize ultimate productivity gains by working smarter and faster so you have time to focus your attention on business-critical activities, provide a differentiated customer experience because you are armed with knowledge about their intricate needs, and make important decisions with confidence to grow your business.

ACT! also supports an anywhere workforce with seamless online, offline, and mobile access solutions so it works for any business environment. And, because ACT! can be fully customized<sup>1</sup> with very little technical knowledge required by you, it is flexible enough to fit the specifications of any industry.



WHY CHOOSE ACT!?	
✓	Work smarter and faster with ACT! to realize ultimate productivity gains so you have time to focus your attention on business-critical activities.
✓	Get a comprehensive, integrated view of your relationships with ACT! and provide a differentiated experience to your contacts because you are armed with knowledge about their intricate needs.
✓	Gain detailed performance insight because all the details are in ACT! so you can make important decisions with confidence and move your business forward.
✓	Support an anywhere workforce with ACT! online, offline, and mobile access solutions. And fully customize ACT! to fit the specifications of your industry.

## KEY ACT! CAPABILITIES AND BENEFITS

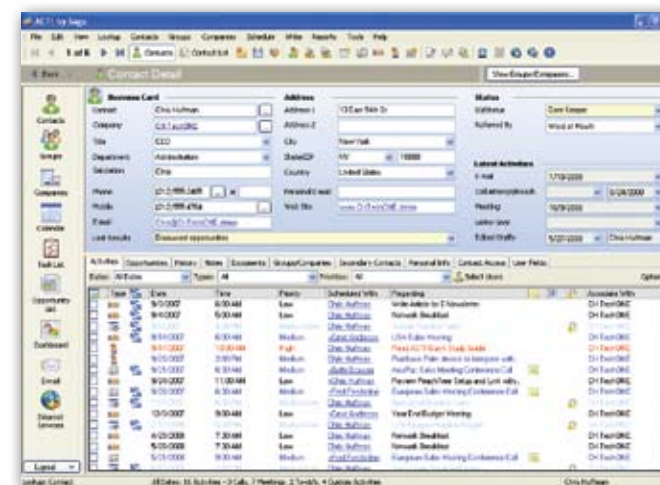
- Keep all your important relationship details in one place for quick, organized access to the information you need.
- Manage interactions at the company or account level for a complete view of relationships with that organization.
- Find the exact relationship details you need instantly using powerful 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 accounting solutions

## Accomplish It All with ACT!

Keep all your important relationship details in ACT! for quick, organized access to the information you need, instead of relying on written Post-it® Notes, multiple Excel® spreadsheets, or worse-your memory. In doing so, you will always have a complete, 360-degree view of your relationships. You can track contacts, groups of related contacts, and companies, keeping detailed Activities, Opportunities, History, Notes, Documents, Secondary Contacts, and more for each. Because all this information resides in a central location, you get instant and easy access to the information you need, just when you need it.

Communications with your contacts can also be tracked in ACT!. Whether you use Microsoft Outlook®, Lotus Notes, or the ACT! e-mail client, track and organize e-mails on associated contact records for a view of your interactions. When you want to send more professional marketing communications to one or multiple contacts, use Mail Merge and pre-formatted templates for HTML, e-mails, and letters with little effort required by you.

For more insight into your business, manage your leads in ACT! from your first interaction through close. Use the ACT! sales process or a process you customize to suit your business and selling style. You can track products on each sales opportunity, specifying product discounts and costs for each item and then generating Instant Quotes<sup>2</sup> without having to enter additional information. View the progress of your sales opportunities, plus your activities, using ACT! dashboards or for more detail, run one of 40 preformatted reports or send most reports to Excel®, HTML, PDF, or e-mail for further analysis. Finally with ACT! you can accomplish it all!



▲ **Contact detail view:** Keep your relationship details in one place and view those details with ease directly from the contact detail view. See all associated activities, sales opportunities, relationship history, notes, and more.



▲ **Dashboard view:** Interactive dashboards provide you with a comprehensive summary view of your top priorities and sales opportunities, and enable management to monitor performance status for individuals and teams.

# ACT! Benefits Anyone Who Works with Contacts-Like You!




**Individual Professionals and Small Business Owners**  
Manage Your Growing Business

Your business life is hectic. Meeting deadlines and handling all the necessary details are urgent priorities for you. ACT! was created for people like you who must...

- ✓ **Provide Superior Service:** Keep your relationship details in one place for easy tracking and access so you provide superior service—ensuring your prospects turn into customers and your current customers remain happy.
- ✓ **Impress Contacts with Your Follow-up:** Touch your prospect and customer base more effectively with professional and timely marketing communications using preformatted templates, Groups, and Mail Merge functionality.
- ✓ **Be Certain No Task Is Forgotten:** Manage your daily responsibilities in ACT! to accomplish more every day and be certain nothing is forgotten.
- ✓ **Drive Revenue for Your Business:** Manage inquiries from your first interaction through close—ensuring no lead is dropped and driving revenue for your business.
- ✓ **Make Decisions with Confidence:** Gauge the performance of your business using dashboards and reports so you know where your time is best spent and which marketing communications are most successful.

*“There are no limits to what ACT! can do for us. It has made a positive impact on our bottom line, and we attribute much of our success to using the contact and customer management system to its fullest potential. Our clients and candidates always remark positively that we know so much about them. In short, ACT! means our customers get excellent service.”*

Founder and President, Seligman & Herrod



**Sales Reps and Teams of Selling Professionals**  
Hit Your Sales Quotas

Meeting ever-increasing sales quotas while selling against competitors is a key challenge for many sales reps. ACT! Premium Solutions are here to help you...

- ✓ **Meet Sales Quotas and Drive Revenue:** Meet your sales quotas and drive revenue by guiding your deals through close using a sales process customized to fit your selling philosophy.
- ✓ **Feel Confident No Task Is Forgotten:** Manage your daily responsibilities and automate redundant tasks so you feel confident nothing is forgotten, while you focus on more important things, like selling.
- ✓ **Provide Superior Service:** Get a complete view of your relationships and keep your current customers happy while also expanding current accounts, with easy access to all the details about their unique circumstances.
- ✓ **Nurture Your Prospects:** Reach out to your prospects more effectively with professional and timely prospecting communications.
- ✓ **Focus Your Attention Where it Counts:** Assess your sales pipeline, including your top sales opportunities and total sales for the month, all in one view using interactive dashboards and eliminate the need to run and analyze reports.

*“With ACT!, all of our sales associates have instant access to customer data, allowing them to cater to each customer’s unique needs and ultimately close more loans.”*

IT Director/CIO, Homestead Mortgage



**Sales Management**  
Get a Handle on Sales Team Performance

Motivating sales reps to use a solution to manage their prospect and customer information can be challenging for many sales managers. The good news is, sales people love using ACT! Premium Solutions. Choose ACT! Premium Solutions and...

- ✓ **Ensure End-user Adoption:** Because ACT! Premium Solutions are easy to learn and use, you ensure rapid end-user adoption, with little or no training required by you.
- ✓ **Coach Underperforming Reps Without Delay:** View how your sales reps are tracking to their sales goals and how their time is allocated using interactive dashboards and reports. With this information, you can coach your sales reps, and help underperforming reps get back on track without delay.
- ✓ **Enhance Sales Predictability and Results:** Enhance sales predictability and results by providing a customized sales process for your team to guide their deals through close.
- ✓ **Focus Your Team on Selling:** Streamline your team’s daily functions so they can focus more on selling rather than administrative tasks, to ultimately improve their productivity.
- ✓ **Maintain Relationship Details, Despite Turnover:** Rest assured prospect and customer details will remain as an organizational asset, even as your team experiences turnover.

*“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.”*

Vice President, U.S. Sales, Transcontinental Printing



**IT Administrators**  
Match Business Requirements

Finding the right solution for your users to manage their prospect and customer information, that also matches organizational requirements, is a big task for many IT administrators. ACT! Premium Solutions deliver on these requirements and...

- ✓ **Reduce Implementation Burden:** Reduce implementation burdens by installing ACT! Premium Solutions, which enable quick deployment and integrate with existing technology investments.
- ✓ **Match Organizational Requirements Exactly:** Match your organization’s unique needs by customizing ACT! Premium Solutions using layout designers that require little technical knowledge and ensure user adoption.
- ✓ **Accommodate the Needs of Your Users:** Accommodate the access needs of your users with Windows®- and Web-based deployment options which have seamless interfaces.
- ✓ **Ensure Database Security:** Ensure database security so information is only accessible by those whom you have granted access, while you rest assured this data is protected.
- ✓ **Maintain with Ease:** Maintain ACT! Premium Solutions easily by utilizing automatic database functions<sup>1</sup> so your organization and your users always have up-to-date prospect and customer information, with little work required by you.

*“When I found out I could administer the whole thing myself, my job satisfaction increased dramatically. I taught myself data import and custom layouts, then wrote and presented a training manual for our staff.”*

Sales Administrator, Medware



# Count on the Proven Success of ACT! and Sage Software

ACT! Solutions offer a robust range of contact and customer management solutions to fit any small to mid-size business (SMB). And with the backing of Sage Software, you know that you will always have the solutions and services you need from a company you can count on.

## Award-Winning ACT! Solutions

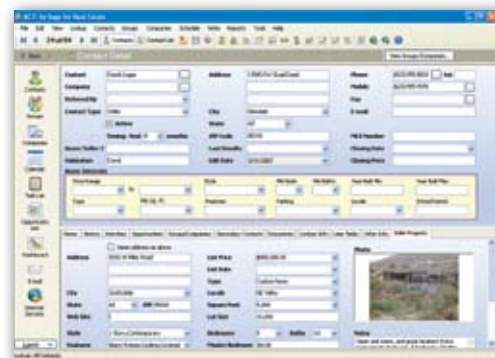
Choose from a variety of award-winning solutions to fit your needs, including **ACT!** which enables individual professionals, small business owners, and anyone who regularly works with contacts to achieve greater productivity and build better business relationships. Or choose **ACT! Premium Solutions**, which are most suitable for individuals and teams of selling professionals seeking a feature-rich, scalable<sup>3</sup> contact and customer management solution.

The key difference between ACT! and ACT! Premium Solutions is that ACT! Premium Solutions are specifically designed to benefit larger teams. With ACT! Premium Solutions, you and your team receive increased data sharing capability, group scheduling functionality, advanced opportunity tracking and customization capabilities<sup>1</sup>, robust dashboards and reports that provide instant insight into team performance, security on multiple levels for keeping highly sensitive information safe, and more. And with online, offline, and mobile access options, you have anywhere access whether office-based, traveling, or remote.

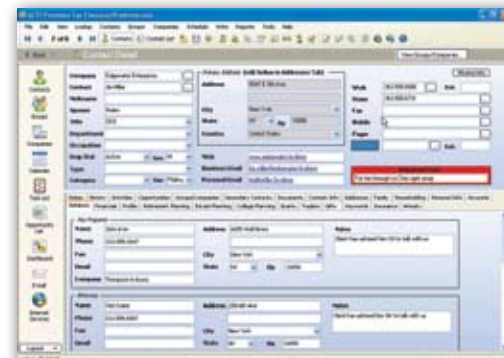
## ACT! Industry Solutions

While ACT! can be used by professionals in virtually any industry, ACT! offers solutions designed specifically for real estate and financial professionals, including **ACT! by Sage for Real Estate** and **ACT! by Sage for Financial Professionals**. These solutions provide you with all the powerful functionality included with ACT!, plus industry-specific features that help you better manage your day and your contacts.

► **ACT! for Real Estate** equips you with the tools you need to be more successful in a competitive market so you can offer improved service to your clients.



► **ACT! for Financial Professionals** is a comprehensive contact and compliance management solution that enables you to enhance client retention and growth.



### CHOOSING AN ACT! SOLUTION

**Are you a small business owner working alone or with a small team?** ACT! is best suited for individuals and small teams of up to 10<sup>4</sup>.

**Do you work within an organization or work with a large team?** Consider ACT! Premium Solutions, which offer anywhere workforce options with Windows and Web-based solutions, plus data sharing for teams of users.

**Are you a realtor or financial professional?** ACT! includes vertical solutions which are specifically designed for those in real estate and financial industries.

**Did you know?** ACT! offers mobile access solutions for commonly used devices as well as options to integrate with popular accounting solutions in-market.

### Work More Effectively with ACT! 2009 (11.0)

Are you already an ACT! user? If yes, you know that feedback from our customers who work with ACT! every day is invaluable to us—in fact, we rely on it when we develop new versions. We observe how you work with ACT! and ask you what would make you work even more effectively. Experience the results for yourself in ACT! 2009. The new features and enhancements will enable you to become even more productive and provide better service to your contacts.

### Growth Options and Local Support

ACT! is part of the Sage Software product family, so you know that as your business grows and changes, you will continue to find a range of business management solutions to meet all your needs. Sage Software offers a wide range of front-office and back-office solutions such as accounting, human resources, payroll, fixed asset management, e-commerce, contact management, and customer relationship management. And, because ACT! is a part of the Sage CRM Solutions product family, which includes market-leading CRM solutions such as Sage CRM, SageCRM.com, and Sage SalesLogix, you can easily migrate from ACT! to a full-scale CRM solution.

Sage Software also has developed a network with hundreds of ACT! Certified Consultants, Value Added Resellers, and Premier Trainers around the world who specialize in ACT! installation, customization, support, and end-user training so your organization can maximize its investment in ACT!. These partners are well versed in front-office disciplines and often have vertical market expertise they can extend to customers on a local, personalized basis.

With Sage Software you have access to award-winning products and services that have revolutionized the way SMBs do business. You can rely on outstanding service and a commitment to providing your business with the technology it needs to succeed, today and into the future.

