



Should I upgrade to ACT! 2009?

Please use the chart below to find out what new features will be available if you upgrade to ACT! 2009 from an earlier version of ACT!. The checkmarks indicate what features are available in your current version of ACT!, and the last column are the features available in ACT! 2009.

ACT! 2005 ACT! 2006 ACT! 2007 ACT! 2008 ACT! 2009

Contact and Customer Management

| | | | | | |
|--|---|---|---|---|---|
| Separate Notes and History tabs | ✓ | ✓ | ✓ | ✓ | ✓ |
| Notes and History shared between Contacts | ✓ | ✓ | ✓ | ✓ | ✓ |
| Unlimited Secondary Contacts | ✓ | ✓ | ✓ | ✓ | ✓ |
| Rich text formatting including colors, bullets, graphics, URLs | ✓ | ✓ | ✓ | ✓ | ✓ |
| Attach documents to Activities and History | ✓ | ✓ | ✓ | ✓ | ✓ |
| Synchronize attachments | ✓ | ✓ | ✓ | ✓ | ✓ |
| Groups with 15 levels of hierarchy (14 Subgroups) | ✓ | ✓ | ✓ | ✓ | ✓ |
| Dynamic Membership | ✓ | ✓ | ✓ | ✓ | ✓ |
| Split Panel Notes Preview | | | ✓ | ✓ | ✓ |
| Hyperlink to Companies from Contact List view | | ✓ | ✓ | ✓ | ✓ |
| Specify Linked Contact/Company fields ¹ | | | ✓ | ✓ | ✓ |
| Print any ACT! calendar template with the contact phone number | | ✓ | ✓ | ✓ | ✓ |
| View all group associations | | ✓ | ✓ | ✓ | ✓ |
| Duplicate checking for Groups and Companies | | | | ✓ | ✓ |
| Advanced Queries for Groups and Companies | | | | ✓ | ✓ |
| List Edit Mode | | | | ✓ | ✓ |

Company Management

| | | | | | |
|------------------------------|---|---|---|---|---|
| Company Records | ✓ | ✓ | ✓ | ✓ | ✓ |
| Contacts linked to Companies | ✓ | ✓ | ✓ | ✓ | ✓ |
| Tree view for Companies | | ✓ | ✓ | ✓ | ✓ |

Intuitive Interface

| | | | | | |
|-----------------------------|--|--|--|--|---|
| Streamlined Setup Assistant | | | | | ✓ |
|-----------------------------|--|--|--|--|---|

Lookups and Searching

| | | | | | |
|---|---|---|---|---|---|
| Lookup Indicator ² | | | ✓ | ✓ | ✓ |
| Edit existing Queries ² | | | ✓ | ✓ | ✓ |
| Advanced Keyword Search ² | | | ✓ | ✓ | ✓ |
| Save Lookups as Groups | ✓ | ✓ | ✓ | ✓ | ✓ |
| Easy and powerful Lookups | | | | | ✓ |
| Fast access to previous contact Lookups | | | | | ✓ |

Sales Opportunity Management

| | | | | | |
|---|---|---|---|---|---|
| Opportunity list view | ✓ | ✓ | ✓ | ✓ | ✓ |
| Opportunity Lookups | ✓ | ✓ | ✓ | ✓ | ✓ |
| Instant Quotes ^{3,2} | ✓ | ✓ | ✓ | ✓ | ✓ |
| Multiple built-in ACT! sales processes | ✓ | ✓ | ✓ | ✓ | ✓ |
| Track multiple products | ✓ | ✓ | ✓ | ✓ | ✓ |
| Generate and import product list ⁴ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Opportunity date fields | | | ✓ | ✓ | ✓ |



Calendar and Activity Management

| | | | | | |
|--|---|---|---|---|---|
| Rich text formatting in Activity details | ✓ | ✓ | ✓ | ✓ | ✓ |
| Five calendar views including daily, weekly, and monthly | ✓ | ✓ | ✓ | ✓ | ✓ |
| View global events | ✓ | ✓ | ✓ | ✓ | ✓ |
| Change activity organizer | | ✓ | ✓ | ✓ | ✓ |
| Automatic Outlook calendar sync ² | | | ✓ | ✓ | ✓ |
| ACT! activity scheduling from Outlook e-mails | | | | | ✓ |
| One-click calendar copy | | | | | ✓ |
| Calendar printing improvements | | | | | ✓ |
| Calendar visibility improvements | | | | | ✓ |

Prospect and Customer Communications

| | | | | | |
|---|---|---|---|---|---|
| Built-in spell checker | ✓ | ✓ | ✓ | ✓ | ✓ |
| Improved Mail Merge | ✓ | ✓ | ✓ | ✓ | ✓ |
| Validate and correct addresses during Mail Merge | ✓ | ✓ | ✓ | ✓ | ✓ |
| ACT! E-mail Find | ✓ | ✓ | ✓ | ✓ | ✓ |
| Use ACT! as Outlook address book | ✓ | ✓ | ✓ | ✓ | ✓ |
| ACT! E-mail Client integrated with Outlook®, Outlook Express, or Lotus Notes® | | ✓ | ✓ | ✓ | ✓ |
| Create ACT! Contacts from Outlook e-mail5 | | | ✓ | ✓ | ✓ |
| Attach Outlook e-mail to ACT! Contacts5 | | | ✓ | ✓ | ✓ |
| Specify default history types and create ACT! history from Outlook5 | | | ✓ | ✓ | ✓ |
| Use flexible Outlook Rules in ACT! | | | | | ✓ |
| Last E-mail field | | | ✓ | ✓ | ✓ |
| En Masse E-mail attaching | | | | | ✓ |
| E-mail send from the Notes Preview Pane | | | | | ✓ |

Dashboards and Reporting

| | | | | | |
|---|---|---|---|---|---|
| ACT! Dashboard | | | | ✓ | ✓ |
| ACT! Premium Dashboard with team views | | | | ✓ | ✓ |
| 20+ preformatted/streamlined sales reports | ✓ | ✓ | ✓ | ✓ | ✓ |
| Graphical sales pipeline with drill down to see opportunity details | ✓ | ✓ | ✓ | ✓ | ✓ |

Data Sharing and Security

| | | | | | |
|---|---|---|---|---|---|
| Group scheduling | ✓ | ✓ | ✓ | ✓ | ✓ |
| Manage resources including conference rooms and equipment | ✓ | ✓ | ✓ | ✓ | ✓ |
| Five security levels | ✓ | ✓ | ✓ | ✓ | ✓ |
| Mark Notes and Opportunities as private | ✓ | ✓ | ✓ | ✓ | ✓ |
| Secure Notes, History, and Opportunities en masse | | | ✓ | ✓ | ✓ |
| Field level security | | | ✓ | ✓ | ✓ |
| Company security ⁶ | | | | ✓ | ✓ |
| Group and Company security ⁷ | | | | ✓ | ✓ |

Customization

| | | | | | |
|---|---|---|---|---|---|
| Share drop-down lists across different fields | ✓ | ✓ | ✓ | ✓ | ✓ |
| Field types – Picture, Yes/No, Memo, E-mail | ✓ | ✓ | ✓ | ✓ | ✓ |



| | | | | | |
|--|---|---|---|---|---|
| Customizable drop-downs; utilize multi-select values ⁴ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Customizable Priority, Activity, and History types ⁴ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Customizable opportunity field names and types with drop-down lists ⁴ | | ✓ | ✓ | ✓ | ✓ |

Administration

| | | | | | |
|--|---|---|---|---|---|
| Scalability to accommodate larger teams ⁸ | ✓ | ✓ | ✓ | ✓ | ✓ |
| View team memberships ⁴ | | ✓ | ✓ | ✓ | ✓ |
| Grant Contact access en masse ⁴ | | ✓ | ✓ | ✓ | ✓ |
| Lookup Contacts by access | | ✓ | ✓ | ✓ | ✓ |
| Custom user permissions | | ✓ | ✓ | ✓ | ✓ |
| Automatic database sync and backup ⁴ | | ✓ | ✓ | ✓ | ✓ |
| Automatic database maintenance ⁴ | | | ✓ | ✓ | ✓ |
| Password rules | | | ✓ | ✓ | ✓ |
| Query-based sync | ✓ | ✓ | ✓ | ✓ | ✓ |
| Improved administration for remote users ⁴ | | ✓ | ✓ | ✓ | ✓ |
| Support for Non-Local Machine Administrators ⁹⁴ | | ✓ | ✓ | ✓ | ✓ |
| Silent Install ¹⁰ | | ✓ | ✓ | ✓ | ✓ |
| ACT! Scheduler in ACT! | | | | | ✓ |
| ACT! Scheduler with hourly options ¹¹ | | | | | ✓ |
| Simplified installation of a remote database | | | | | ✓ |
| Streamlined sync progress bar | | | | | ✓ |
| Option to exclude attachments from backups ¹¹ | | | | | ✓ |
| Quick info for logged-in users | | | | | ✓ |

Mobile and Remote Access

| | | | | | |
|--|--|---|---|---|---|
| BlackBerry ¹² | | ✓ | ✓ | ✓ | ✓ |
| Citrix® or Terminal Services ¹³ support | | ✓ | ✓ | ✓ | ✓ |

Microsoft® Office Integration

| | | | | | |
|-----------------------------|---|---|---|---|---|
| Tighter Outlook integration | | | | | ✓ |
| Export to Excel® | ✓ | ✓ | ✓ | ✓ | ✓ |

Accounting Integration²

| | | | | | |
|---|--|---|---|---|---|
| Peachtree by Sage and QuickBooks® Pro/ Premier | | ✓ | ✓ | ✓ | ✓ |
| Simply Accounting by Sage, Sage MAS 90 and Sage MAS 200, and Sage BusinessWorks | | ✓ | ✓ | ✓ | ✓ |

If upgrading from ACT! 6.0, ACT! 2009 offers over 300 new features!

- Not all fields can be linked and linked field types must be compatible.
- This feature is not available in ACT! Premium forWeb.
- Requires Microsoft Excel and Word 2002, 2003, and 2007.
- In ACT! Premium for Web, this operation must be performed on the Web server.
- ACT! must be added as an Outlook address book to use this feature.
- In order to utilize Company Security, you must add the Company Access control to your layout.
- Limited access Group and Company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 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.
- Must be a member of the Microsoft Windows Administrator's group to perform the following: install, register, and activate ACT. Features such as ACT! Scheduler (Premium product only), sharing database with other users, and changes to handheld sync settings must be performed by a Windows administrator.
- 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.
- In ACT! Premium for Web, administrative functions must be performed on the Web server.
- Requires additional purchase.
- Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.