

ACT! | Feature Chart

- Tier Comparison

ACT! 2009 (11.0)

ACT! Premium Solutions
2009 (11.0)

	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	✓	✓

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 ⁵	✓	✓
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 ^{™11.5}	✓	✓
Windows [®] or offline access	✓	✓
Web access ¹⁶		✓
Citrix [®] or Terminal Services ¹²	✓	✓
Sync Services		✓
Templates for popular paper organizers for printed schedules	✓	✓

Integration		
Microsoft Outlook, Word ⁵ , 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 Office ⁵		
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}	✓	✓

About ACT!

The #1 selling contact and customer manager for over 20 years, ACT! by Sage continues to dominate the market by bringing the latest, most intuitive technology to businesses around the world. ACT! is used by 2.8 million users and 43,000 corporate customers, including individual professionals, small business owners, selling professionals and corporate teams who are fanatical about the benefits they receive from using ACT!. With ACT!, you, too, can be productive on a scale like you have never known before, set yourself apart in the minds of your contacts, and make more informed decisions about your business. And you can accomplish it all from anywhere using seamless online and offline options, plus mobile access solutions.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Important Note: Sage Software recommends you review ACT! 2009 Solutions system requirements at www.act.com/2009sysreq 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. ACT! Premium for Web is not available on a standalone basis. ACT! Premium for Web is only available with ACT! Premium-Corporate Edition. 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/2009sysreq 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.
- ¹⁶ ACT! Premium for Web is only available with ACT! Premium—Corporate Edition.

