ACT! by Sage

ACT! by Sage is the #1 selling contact and customer management solution used effectively by 2.8 million users, including individual professionals, small business owners, and anyone who regularly works with contacts. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business. Choose ACT! today and accomplish tasks crucial to the success of your business.

Keep All Your Important Relationship Details in One Place

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

Find the exact relationship details you need instantly with lookups and advanced queries.
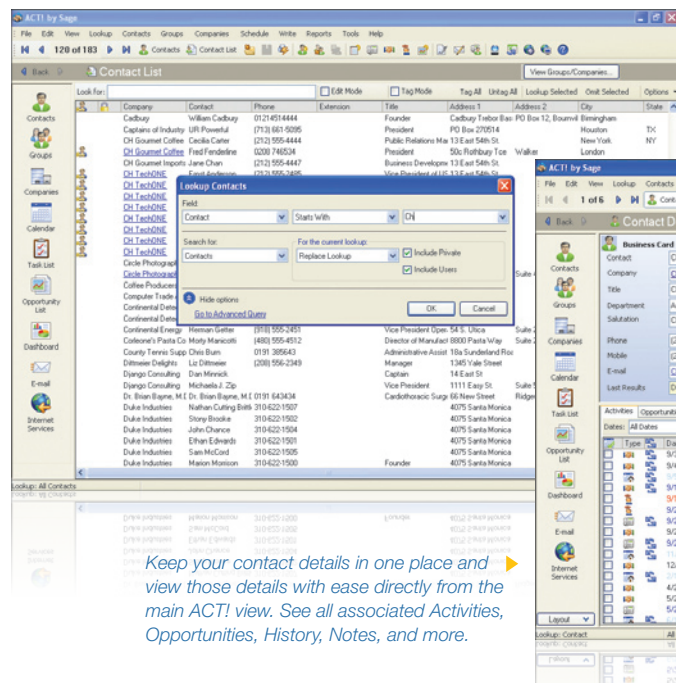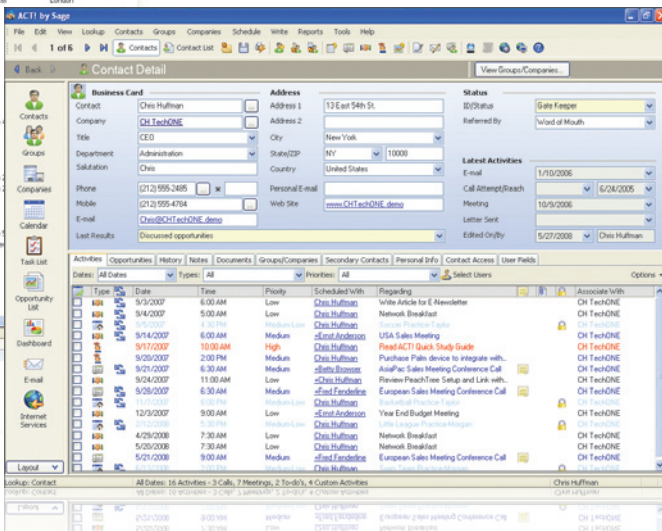
Keep your contact details in one place and view those details with ease directly from the main ACT! view. See all associated Activities, Opportunities, History, Notes, and more.

If so, you are probably spending too much time searching for the information you need. Choose ACT! and provide superior service to your prospects, customers, or anyone you contact regularly because you have a complete, integrated view of your relationships—all in one easy-to-access location.

"There's no question that we're being more productive. We're working more on those opportunities that are most productive for us. ACT! has been instrumental in helping us pursue those leads."

—Larry Schottenstein,
   Buyer's Agent Real Estate

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 realize 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, utilize 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, customize 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.

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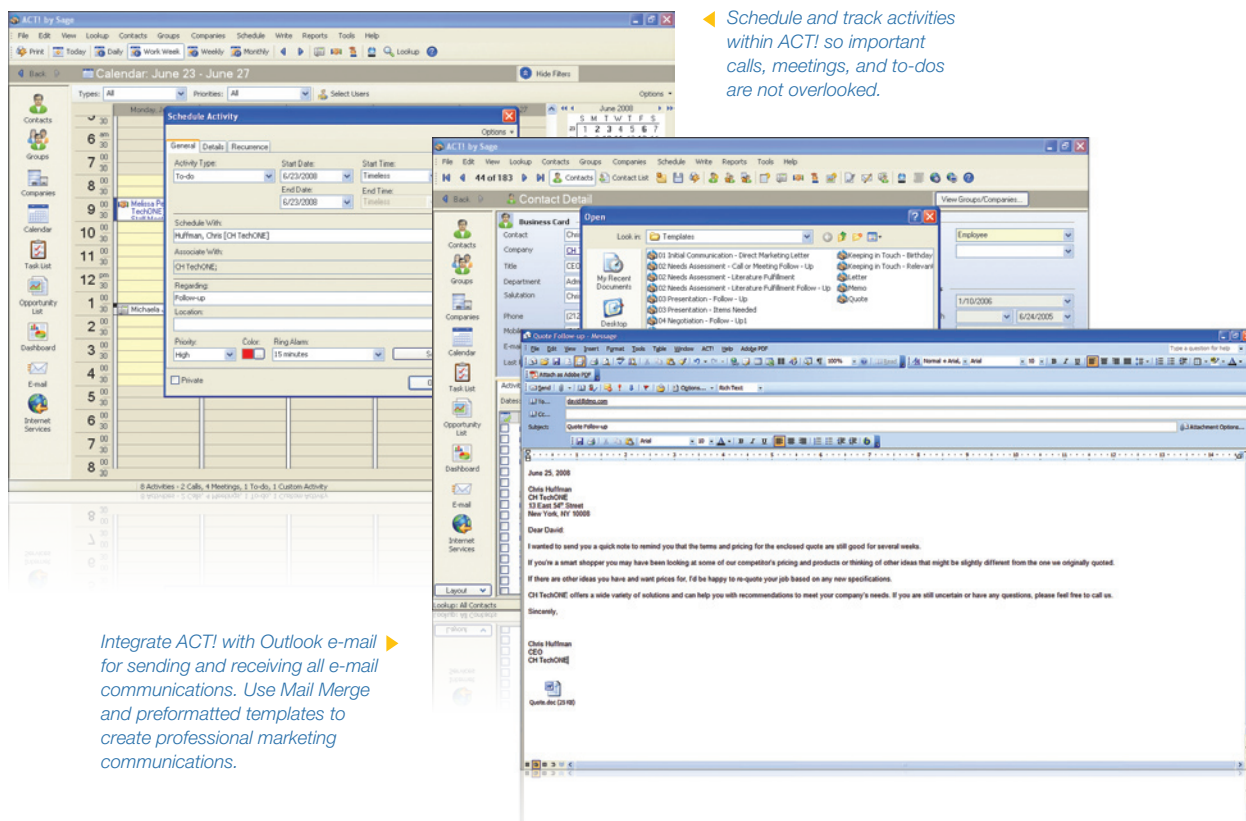
Integrate ACT! with Outlook e-mail for sending and receiving all e-mail communications. Use Mail Merge and preformatted templates to create professional marketing communications.

Monitor Your Leads from First Interaction Through Close

Ensure no lead is dropped by using the ACT! sales process or a process you customize 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[1] 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 startup 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 Customize 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. Customize ACT! to fit the look of your business by changing layout colors and inserting your logo. Because ACT! can be so highly customized, 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, specialized information.
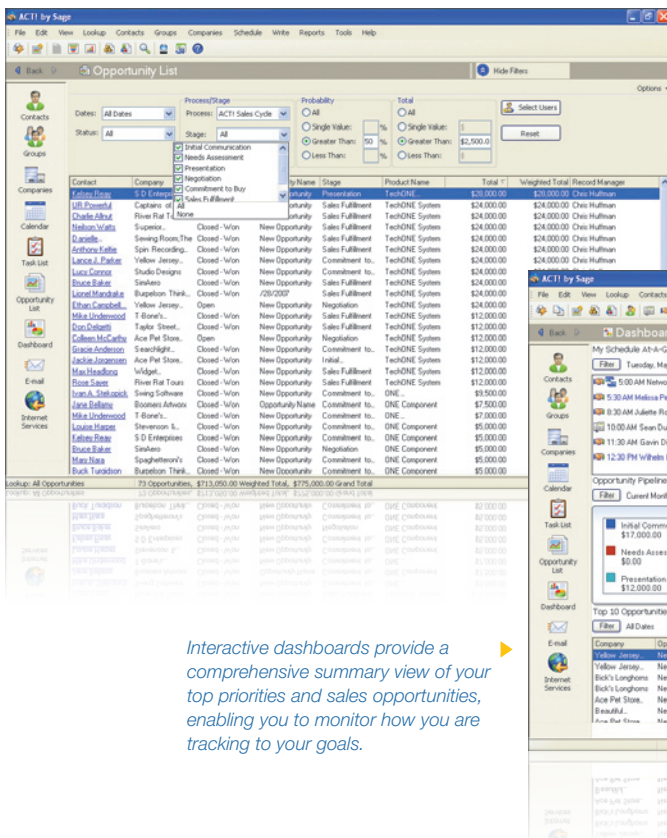

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DO YOU HAVE A GROWING TEAM?

Consider ACT! Premium Solutions which are specifically designed to benefit larger teams.[2] With ACT! Premium Solutions, you and your team benefit from increased data sharing capability, group scheduling functionality, advanced opportunity tracking and customization capabilities[3], robust dashboards and reports, security on multiple levels, and more. And with online, offline, and mobile options, you have anywhere access whether office-based, traveling, or remote.

"Every day more prospects are becoming customers and they are taking the time to describe how good they feel about the service we provide. This tells me ACT! is the right tool to help VazCom Communications succeed and grow. It is embedded in our organization and cannot easily be replaced."

—Jose Vazquez, VazCom Communications

"It's an invaluable tool for our business. We're able to manage thousands of contacts, merge documents to Groups, and keep History and Notes for every contact. If we had to go to the file cabinet or call people to see if they're available to meet, I can't imagine how much time and energy we'd waste. We do it all in ACT!."

—Gordon Rogers,
Gordon Rogers Architecture

Key ACT! Capabilities and Benefits

- **Keep all your important relationship details in one place** for quick, organized access to the information you need.

- **Get up-to-speed quickly and remain productive** because ACT! provides you with an intuitive interface, making it easy to learn and use.

- **Find the exact relationship details you need** instantly using powerful search capabilities in an easy-to-use format.

- **Manage your daily responsibilities** by scheduling and tracking activities within ACT! so important calls, meetings, and to-dos are not overlooked.

- **Communicate consistently and successfully** so you are always top of mind with your prospects and customers.

- **Monitor your leads from first interaction through close** and ensure no lead is dropped.

- **Gain instant insight into the performance of your business** using dashboards and reports for more informed decision making.

- **Easily customize ACT!** to fit your unique business requirements and ensure you are capturing the exact data you require.

- **Remotely access relationship details,** along with your schedule, for the information you need, when and where you need it.

- **Integrate ACT! with the applications you use every day,** including Microsoft Office and popular accounting solutions, to work the way in which you are accustomed.

Start using ACT! today!

Call 1-866-903-0006

Contact your ACT! Certified Consultant

Visit **www.act.com**

Important Note: Sage Software recommends you review ACT! 2009 Solutions system requirements at 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 or check with your add-on product provider to determine compatibility.

1   *Requires Microsoft Excel and Word 2002, 2003, and 2007.*

2   *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.*

3   *In ACT! Premium for Web, administrative functions must be performed on the Web server.*

About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 43,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an "anywhere" workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.

SAGE 360°

End-to-end solutions. Expert advice.
Premium support. That's Sage 360°.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

sage
software
Your business in mind.