



Make contact.
Build relationships.
Get results.

ACT! enables individuals and organizations to instantly access key contact and customer information, manage and prioritize activities, and track all contact-related communications so you can build productive business relationships.

Renowned for its ease of use, ACT! can be tailored to individual user needs and offers robust integration with tools you use every day.

Upgrade today!

For more information about ACT!:

- Call 1-877-ACT-2007
- 5 users or more?
Call 1-888-855-5222 for Corporate Licensing
- Contact your ACT! Certified Consultant
- Visit www.act.com/upgradecenter



ACT! by Sage 2007 (9.0)

– for ACT! 2005 (7.0) Users

ACT! 2007 delivers many new features, as well as improvements to existing features, so you can be more productive on a daily basis. Easy integration with applications you use every day – like Microsoft® Outlook® – and improved lookup and search capabilities are a few of the key enhancements that help you do more in less time. There are also improvements that allow you to better organize customer data, so you can quickly access key information when you need it.

Here are a few of the benefits you will receive if you upgrade today.

Top Upgrade Features and Benefits:

- 1. Seamlessly integrate ACT! and Microsoft Outlook e-mail, saving you time while allowing you to track vital information on your ACT! Contact Record** – When using Outlook as your preferred e-mail client within ACT!, an Outlook new e-mail message form opens, allowing you to e-mail as you are most accustomed to in Outlook, but track vital information in ACT!. You can send an e-mail by simply clicking on the e-mail hyperlinks, send a letter in e-mail, or conduct an e-mail mail merge using the Outlook integration. From within Outlook, when sending an e-mail in which you want to create a history in ACT!, simply type in the e-mail address or select from the Outlook or ACT! address books. ACT! will resolve any e-mail address in the To, CC, and BCC fields and attach a history to the ACT! contact with the matching e-mail address automatically. Additionally, create an ACT! contact from an Outlook e-mail. Contact Name and E-mail Address fields are automatically filled in and you can populate up to 10 additional fields to ensure a complete contact record – even attach the Outlook e-mail to the contact record for a complete view of all customer communications.²
- 2. Quickly view your most recent communications with a contact using the Last E-mail field** – From the Contact Detail View, quickly identify the last e-mail send date for the given contact using the Last E-mail field. Along with the Last Reach, Last Attempt, Last Meeting, and Last Letter fields you have a quick snapshot of all your recent communications with that contact. The Last E-mail field will update any time an e-mail history is created, whether you are using the ACT! E-mail Client integrated with Lotus Notes® or Outlook Express, or through direct integration with Outlook.³
- 3. Easily associate contacts with companies and maintain up to date information across the entire customer record** – From the Contact List View, you can multi-select contacts and link them with a company already in the database, quickly and easily. Or, from the Contact Detail View, add or remove a contact from multiple groups or companies at once. Even specify which fields you want linked between the Company and Contact Records so when the field changes on a company, you are prompted to change that field for all contacts linked to the company.⁴
- 4. Maneuver between contact and company quickly and easily** – If a contact is linked to a company, the company name will display as a hyperlink in the Contact List View for quick and easy maneuvering between contacts and companies.
- 5. Utilize Group and Company Tree View for a snapshot of associated relationships** – Easily see relationships and hierarchies using the Tree View for quick, easy navigation within Groups or Companies.
- 6. Find exactly what you are looking for, quickly and easily, with improved search capabilities** – Searching has never been easier with Advanced Keyword Search. Perform a keyword search and automatically be taken to the exact location of your keyword. Advanced Keyword Search locates and highlights terms in Contact, Group, and Company Detail Views, and, it even opens a note, history, activity, or opportunity and highlights the keyword so you can locate the information you need quickly and easily.
- 7. Determine when you are in a lookup or accessing your entire database** – With the Lookup Indicator you can see when you are in a lookup of contacts or viewing your entire contact list. The Lookup Indicator appears in the lower left corner of the screen and indicates the type of lookup you are conducting whether it's all Contacts, State, ID Status, or one of the many available lookups within ACT!.



Should you be considering ACT! Premium products?

They provide:

- Flexible deployment options with ACT! by Sage Premium for Workgroups 2007 (9.0) and ACT! by Sage Premium for Web 2007 (9.0).
- Scalability to accommodate larger workgroups or teams¹.
- Centralized administration and advanced security functions geared towards workgroups and teams.
- Automatic database synchronization, maintenance, and backup to ensure up-to-date customer information and database reliability.
- Advanced opportunity tracking for more accurate data and better reporting.
- Group Scheduling² for your entire workgroup to increase team efficiency.
- Synchronization of ACT! and Outlook calendars³ so you have current times of important meetings.

¹ Sage Software offers a recommendation of up to 30 users for ACT! Premium for Workgroups and ACT! Premium for Web (EX Editions) and up to 50 users for ACT! Premium for Workgroups and ACT! Premium for Web (ST Editions). Actual scalability and number of users supported will vary based on hardware and size and usage of your database. Sage Software scalability recommendations are based on in-house performance tests using the recommended server system requirements found at: www.act.com/2007systreq. Published minimum system requirements are based on single user environments. You must purchase one license of ACT! per user.

² This feature is not available in ACT! Premium for Web.

³ Requires Microsoft Outlook 2000, 2002, or 2003.

This feature is not available in ACT! Premium for Web.

sage
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Your business in mind.

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- 8. View multiple notes at once and preview the critical ones using the new split-panel notes feature** – View the entire contents of a contact, group, or company note while simultaneously scrolling for another note using the option of a split-panel within the Notes tab. Simply highlight the note from a list of notes on one side to quickly view the full contents of that note on the other side of the split-panel.
- 9. Change activity organizer to manage meetings with ease** – Easily update or change a meeting or activity organizer, even after the activity has been scheduled.
- 10. Don't lose data, even with forgetful remote employees** – Database synchronization expiration has been extended from 90 to 365 days. And, even if a remote database expires, it can be synchronized back to the main database one last time so you don't lose critical contact and customer data.
- 11. Synchronize only the attachments you need to improve synchronization times** – Only attachments related to your selected sync set will sync, saving time and improving performance and security.
- 12. Better suit your search and reporting needs by editing existing queries** – Easily edit an existing query statement and then save the new final query.
- 13. Regulate password usage settings to ensure your data is secure** – Utilize password rules such as password expiration options, complexity of a password, and password re-use to help protect valuable contact information from intruders.

Important Note for all customers:

Compatibility with ACT! Products: ACT! 2007 cannot be used in conjunction with ACT! Premium for Workgroups 2007 (EX or ST Edition) or ACT! Premium for Web 2007 (EX or ST Edition). When used in standalone environments, ACT! Premium for Workgroups and ACT! Premium for Web products are only compatible with their respective same editions. When used in conjunction with each other, ACT! Premium for Workgroups and ACT! Premium for Web editions must be the same. **Regarding ACT! Add-on Products:** Certain ACT! add-on products may not be compatible with the ACT! 2007 product family. Please visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

¹ During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook.

² Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.

³ Requires Microsoft Outlook 2000, 2002, or 2003 or Outlook Express 5.5 or 6.0. Requires Lotus Notes 6.5.

⁴ Not all fields can be linked and linked field types must be compatible.

About ACT!

ACT! is the #1 selling contact and customer manager that enables individuals and organizations involved in selling or other contact related functions to Make contact, Build relationships and Get results.

ACT! helps you instantly access key contact and customer details, manage and prioritize activities, and track all contact-related communications, so you can build productive business relationships.

ACT! has a 19-year track record for being easy to use, customizable and affordable for the small business market place. With more than 2.5 million registered users and 35,000 corporate accounts standardized on ACT!, ACT! continues to be the market leader in contact and customer management.

About Sage Software

Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.6 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 5.0 million customers worldwide.

For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at www.sagesoftware.com/moreinfo or call (866) 308-2378.