



**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! 2004 (6.0) Users

ACT! 2007 delivers a significant number of new features, as well as improvements to existing features, so you can be more productive. Easy integration with the applications you use every day, like Microsoft® Outlook®, additional ways to organize and search on information, and improvements to opportunities to provide better visibility into your sales opportunities are a few of the key enhancements to help you do more in less time. In addition, we provide you with even more ways to tailor ACT! so you can track information specific to your unique business.

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. Manage your contacts at the company level for a complete customer view** – Manage your customer interactions either at the contact or company level with the Company Record feature. Now you can create company and division records, associate key contacts to those records, and view all associated Notes, History, and Opportunities for a complete view of your relationship with that organization. By linking contacts to a Company Record, when core company information is updated such as Address or Web site, it is automatically updated on each contact as well. Even specify the fields you want linked so that when a field changes on the company, you are prompted to change that field for all contacts linked to the company.⁴ Once 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.
- 4. Utilize separate Note and History tabs for more accurate tracking of your relationship with a contact** – Separate Note and History tabs help you better track your relationship details. You can share notes and history with multiple contacts and make a change in a note or history for one contact and have the option to update the note for all contacts that share this note or just the one you are working within. Rich Text Formatting is available when adding detail, allowing for colors, different fonts, bullets etc. in all Notes, History items, and Opportunity details. And, documents can be attached to Notes, History, and Activity items so everything is in one place.
- 5. 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.
- 6. Maintain accurate, up-to-date customer information in one database** – Database synchronization is more reliable and accurate than ever! It's based on a query to ensure you're always seeing contacts you want to see and the subscription list gives you an easy way to handpick contacts you always want to see, regardless of the query. And, templates and attachments synchronize to other users as well.



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/2007systemreq. 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
software

Your business in mind.

8800 N. Gainey Center Drive
Suite 200
Scottsdale, Arizona 85258
www.act.com

7. **Analyze your data or share with non-ACT! users using one-click export to Excel®** – One-click export to Excel® allows you to export Contact, Group, Company, or Opportunity Lists to a Microsoft Excel spreadsheet for sharing with non-ACT! users or for further analysis using built-in, customizable pivot tables. All column customizations are maintained when exporting for easy viewing.⁵
8. **Tailor ACT! to your business using customizable priority, activity, and history types** – Create your own activity, history, priority, or other field types so ACT! is customized to your business and provides you with meaningful ways to report and track your business. For example, you can define “Billable Hours” as an activity type instead of just using “Meeting”, “Call”, or “To-Do”.
9. **Garner more accurate reporting and better insight into your business with advanced field types** – With advanced field types, you can add picture and memo fields so you can capture information that is required by your business. For example, with picture field you can store images of people, real-estate, or any other photo image required to run your business effectively. In addition, most fields can be designated as multi-select so you can better track information that requires more than one selection such as ID Source or Referred By. Capturing relevant data allows you to then report accurately and have better insight into your business.
10. **Organize and drill down on important groups of contacts** – Dynamic and static groups allow you to group relevant contacts and view a roll-up of all notes, history and activities with that group. Dynamic Groups are those in which contacts move in and out of the Group based on the criteria you specify, with no additional work. You can create Groups for all of your customers in California or for all of your customers in a given month that are up for renewals. The Groups feature can now accommodate up to 15 levels of hierarchy (14 subgroups) so you can segment your Groups as detailed as you like. Easily see relationships using the Tree View for quick, easy navigation. From the Contact Detail View, users can view all group memberships for that contact, whether they were manually added to groups or if they are dynamic members based on a group definition.

Important Note for customers upgrading from ACT! 6.0/2004 or prior versions to ACT! 2007 or ACT! Premium for Workgroups 2007:

Customer activation and registration are required to use ACT! 2007 and ACT! Premium for Workgroups 2007. Certain features have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e-mail/modem-based database synchronization, and SideACT!. Several aspects of the system requirements have been updated. It is recommended that you carefully review the system requirements for compatibility and acceptance prior to upgrading.

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.

5 Requires Microsoft Excel 2000, 2002 or 2003.

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.