



## ACT! by Sage

ACT! by Sage is the number 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 organise 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 Manchester or build more advanced searches such as all contacts in Hampshire 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.

## NUMBER 1 SELLING CONTACT AND CUSTOMER MANAGER

### Key Capabilities:

Keep all your important relationship details in one place.

Get up-to-speed quickly and remain productive.

Find the exact relationship details you need instantly.

Manage your daily responsibilities.

Communicate consistently and successfully.

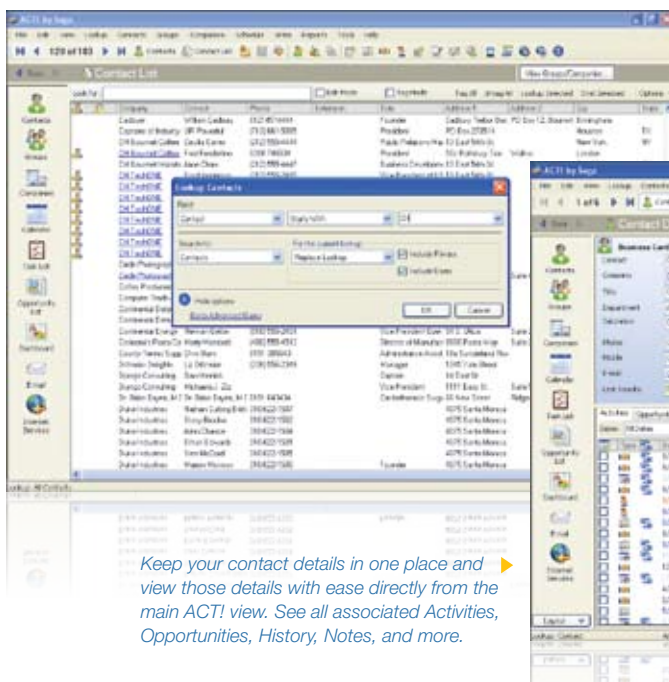
Monitor your leads from your first interaction through to close.

Gain insight into the performance of your business.

Easily customise ACT! to fit your unique business requirements.

Remotely access relationship details.

Integrate ACT! with the applications you use every day.



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.

## ARE YOU USING PAPER-BASED METHODS, SPREADSHEETS, OR E-MAIL SYSTEMS TO MANAGE YOUR CONTACTS?

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.

*“As a small business, ACT! has allowed us to empower people. The software gives us visibility of all our customers and we can communicate with them easily as a result. Plus it’s perfect for a team that spends vast amounts of time out of the office.”*

— David McPherson, founder, Aegis IT

## Manage Daily Responsibilities and Improve Productivity

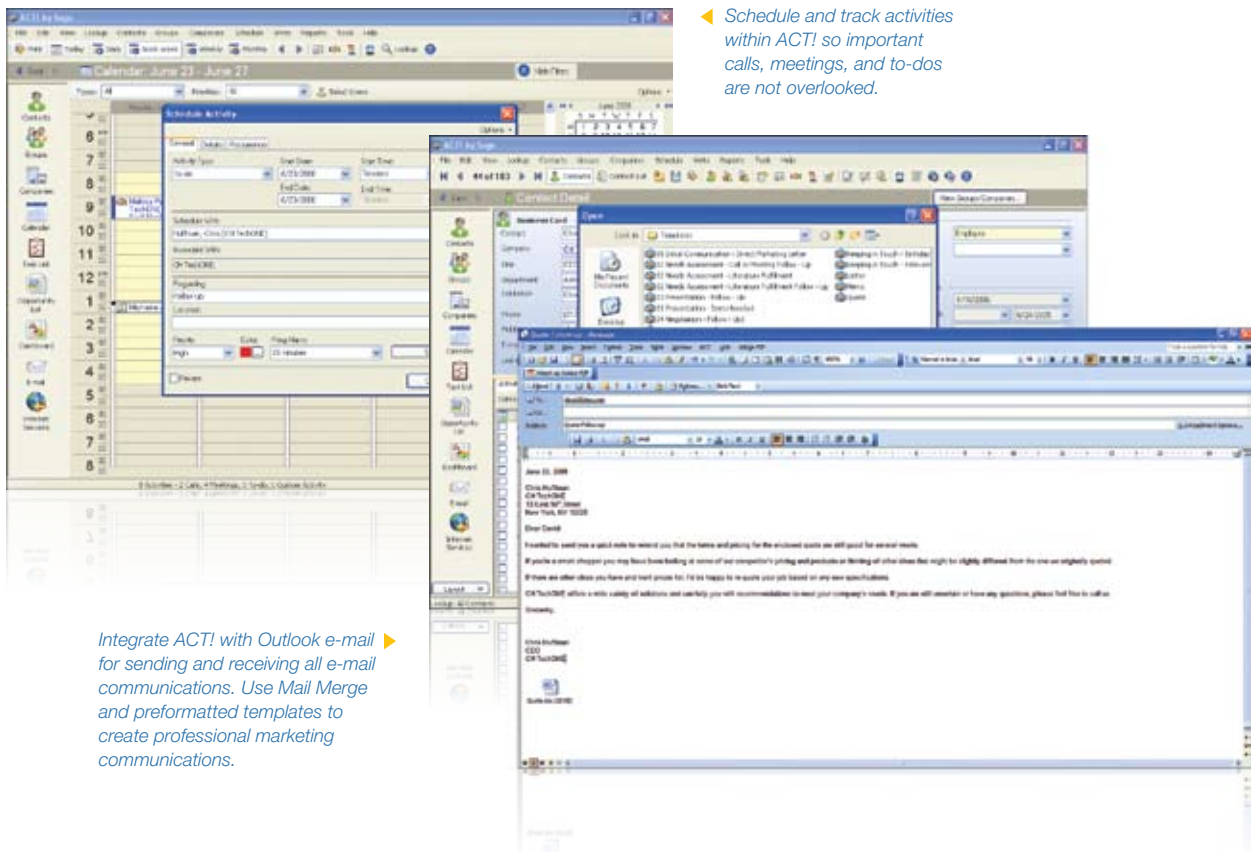
Schedule and track activities within ACT! so important calls, meetings, and to-dos are not overlooked. You have multiple options for managing your day, week, or month using one of many calendar views, the Task List for filtering a view of all activities, and the Dashboard which provides a graphical, 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 realise 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, utilise 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, customise 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.



◀ Schedule and track activities within ACT! so important calls, meetings, and to-dos are not overlooked.

▶ 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 to Close

Ensure no lead is dropped by using the ACT! sales process or a process you customise 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<sup>1</sup> 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 Customise ACT! to Fit Your Unique Business Requirements

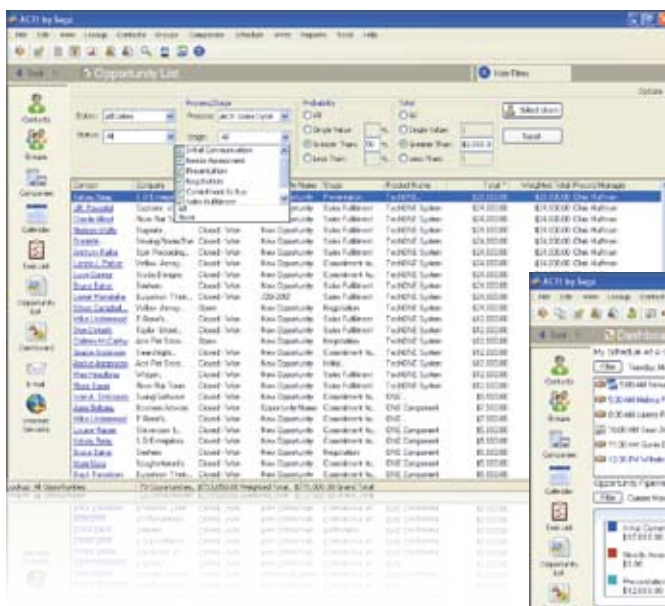
Tailor ACT! to capture the data you require. Using the ACT! Layout Designer, add fields and tabs and designate field types (including Date, Currency, Yes/No, Expansive Memo, and Picture) with simple point-and-click technology. Customise ACT! to fit the look of your business by changing layout colours and inserting your logo. Because ACT! can be so highly customised, 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, specialised information.

## DO YOU HAVE A GROWING TEAM?

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

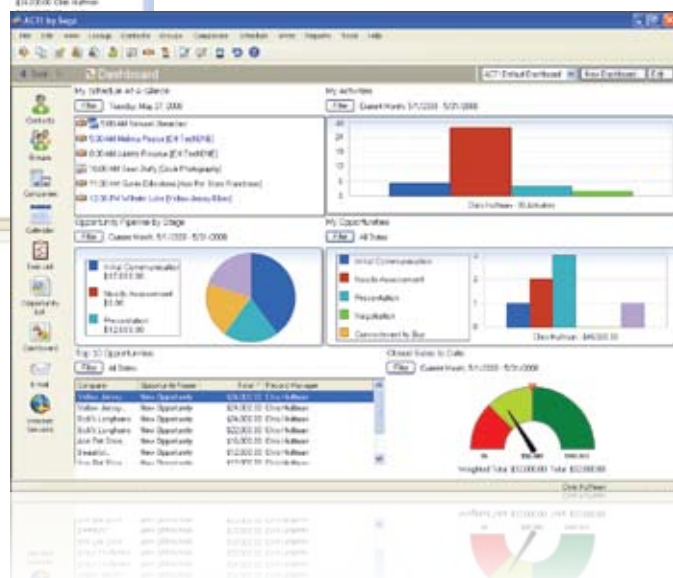
*"If time is money, the software will have paid for itself in a month flat."*

— Michelle Collins, Managing Director, First Locksmith Services



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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.



*"We originally implemented ACT! over 6 years ago - and the company has never looked back since. Payback on our investment in ACT! has been immeasurable, and there is no problem getting buy-in from employees since they see the benefits from using it on a daily basis."*

— Tony Whiting, director, Raytec CCTV

## Key ACT! Capabilities and Benefits

- **Keep all your important relationship details in one place** for quick, organised 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 to 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 customise 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 Sage accounting solutions, to work the way in which you are accustomed.

### Start using ACT! today!

Call 0800 44 77 77

Contact an ACT! Business Partner  
on 0845 111 77 33

Visit [www.sage.co.uk/act](http://www.sage.co.uk/act)

**Important Note:** Sage recommends you review ACT! 2009 system requirements at [www.sage.co.uk/act/systreq](http://www.sage.co.uk/act/systreq) to ensure you meet these requirements.

**Compatibility:** ACT! cannot be used in conjunction with ACT! Premium. ACT! Premium is only compatible with their respective same editions.

**Add-on Solutions:** Visit [www.actsolutions.com](http://www.actsolutions.com) or check with your add-on product provider to determine compatibility.

<sup>1</sup> Requires Microsoft Excel and Word 2002, 2003, and 2007.

<sup>2</sup> Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at [www.sage.co.uk/act/systreq](http://www.sage.co.uk/act/systreq) are based on single user environments. You must purchase one license of ACT! per user.

<sup>3</sup> In ACT! Premium for Web, administrative functions must be performed on the Web server.

### About ACT!

The number 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 is a leading supplier of business management software and services to 5.7 million customers worldwide. From small start-ups to larger organisations, we make it easier for companies to manage their business processes. Our purpose is to help our customers run their businesses more effectively, helping them to gain greater insight into their business activities and providing them with lasting benefits by automating their business processes.

### Order today!

- Call 0800 44 77 77
- Contact your ACT! Business Partner
- Visit [www.sage.co.uk/buyact](http://www.sage.co.uk/buyact)



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