ACT! Premium Solutions by Sage

ACT! by Sage Premium Solutions

ACT! by Sage Premium Solutions are feature-rich, scalable[1] contact and customer management solutions used effectively by 43,000 corporate customers, including individuals and teams of selling professionals in a variety of industries. ACT! Premium Solutions offer seamless online, offline, and mobile access to an integrated view of contact relationships so teams can maximize productivity and provide a better customer experience. With individual and team performance reporting, managers can ensure employees stay on track to meet and exceed their goals. Take advantage of this powerful functionality today and accomplish tasks crucial to the success of your organization.

Centralize Prospect and Customer Relationship Details

Track detailed contact information, including notes, history, activities, sales opportunities, and documents—all tied to the associated Contact Record for a complete, integrated view. Even track Companies with associated multiple contacts or groups of related contacts for easier communicating. Manage interactions at the company or account level for a complete view of relationships with that organization. You and your team get accurate, detailed information about contacts, impressing prospects and customers with your knowledge.

Manage Daily Responsibilities and Improve Productivity

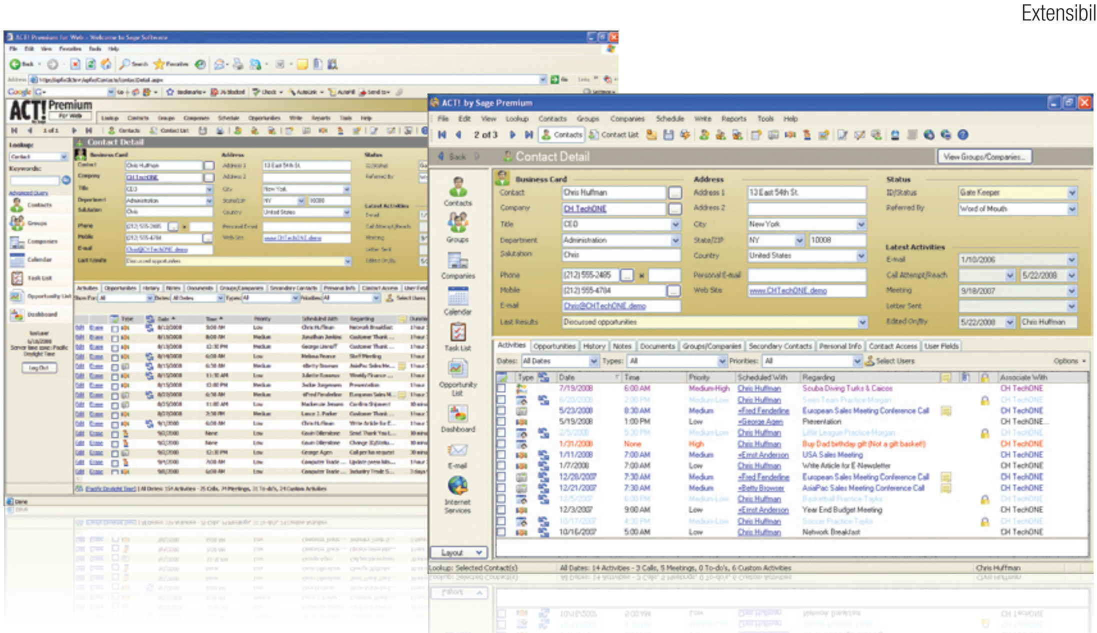
Manage individual and team schedules and tasks for the day, week, or month using one of many calendar views; the Task List for a filterable view of all activities; and the dashboard for a graphical summary view. If your organization uses Microsoft® Outlook®, copy ACT! and Outlook calendars automatically[2] to keep activities up-to-date in both schedules.

Stay on top of deliverables by setting Activity Alarms. Any activities not completed roll over to the next day. Schedule an Activity Series[3] to automate redundant tasks for routine activities with multiple steps; a due date change to one will realign related activities. Plus, use group scheduling functionality across your team. Enhance overall individual and team productivity all day, every day.

FEATURE-RICH, SCALABLE[1] CONTACT AND CUSTOMER MANAGER

Key Capabilities:

- Contact and Customer Management
- Company Management
- Intuitive Interface
- Lookups and Searching
- Calendar and Activity Management
- Sales Opportunity Management
- Prospect and Customer Communications
- Dashboards and Reporting
- Data Sharing and Security
- Codeless Customization
- Anywhere Workforce
- Integration
- Extensibility



The Windows® and Web products are full-featured ACT! applications, unlike many other CRM online/offline solutions, so you and your team truly receive seamless access options.

ARE YOU USING A CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOLUTION TO MANAGE YOUR RELATIONSHIPS?

CRM builds on the foundation of contact and customer management. For example, CRM solutions are software suites that, in addition to providing relationship management capabilities, offer integration of marketing, sales, service, and support functions across your organization. Because of the added functionality, there is typically more of a learning curve associated with CRM solutions. If you and your organization do not have such complex business requirements, you may want to consider ACT! Premium Solutions. ACT! enables you to manage your relationships successfully while allowing you to be up and running quickly.

"Prior to implementing ACT! Premium, we had no visibility into our sales pipeline. Now our department is viewed as a leader within the organization—a model of an effective sales and marketing workforce. With ACT! Premium, we are light years ahead."

—Bruce Jensen, Transcontinental Printing

Forecast and Track Sales Opportunities

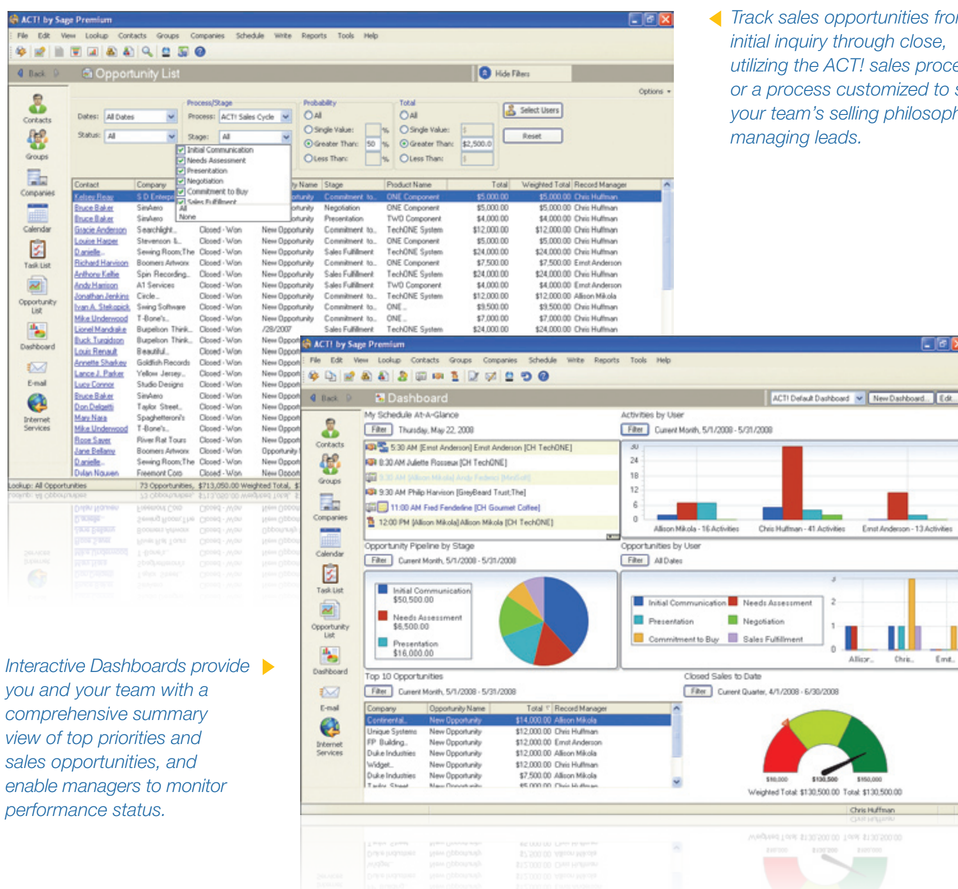
Track sales opportunities from initial inquiry through close, using the ACT! sales process or a process customized for your team's selling philosophy for managing leads. When working a sales opportunity, schedule a follow-up activity (populated automatically with the opportunity details), ensuring all 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—even generate Instant Quotes[4 2]—without having to enter additional information.

Get a complete view of sales pipelines by viewing the Dashboard or one of 20 preformatted sales reports for a better understanding of which sales are tracking to close this month, quarter, or year and where to focus attention in the coming days or weeks. With more visibility into sales pipelines, more accurate forecasts are generated for your organization.

Gain Insight into Individual and Team Performance

Interactive Dashboards provide you and your team with a comprehensive summary view of top priorities and sales opportunities, including a gauge of team targets, and enable managers to monitor individual and team performance. You and your team can set the Dashboard as your default startup view to begin the workday with a snapshot of this information so you understand your priorities for the day.

Managers get more detailed insight into individual and team performance with one of 40 preformatted reports, including Activity Reports, Sales Summaries, and more for each team member or for the team as a whole. Or for further analysis, send most reports to Excel®, HTML, PDF, or e-mail. Managers gauge individual and team performance using team views on the Dashboard and reports specific to each team member, so they can coach underperforming reps without delay.



Track sales opportunities from initial inquiry through close, utilizing the ACT! sales process or a process customized to suit your team's selling philosophy for managing leads.

Interactive Dashboards provide you and your team with a comprehensive summary view of top priorities and sales opportunities, and enable managers to monitor performance status.

Share and Secure Details Across Teams

Keep information secure across your organization by setting security options at the Contact, Group, Company, and field levels[5], marking each as full, read-only, or no access for particular users and teams. Assign up to five security levels and restrict users from deleting and exporting data to keep this information as an organizational asset, even when team members leave. Finally, set password rules to keep data secure from intruders. All this ensures that your organization maintains high security standards for your valuable contact information.

Deploy and Implement with Ease

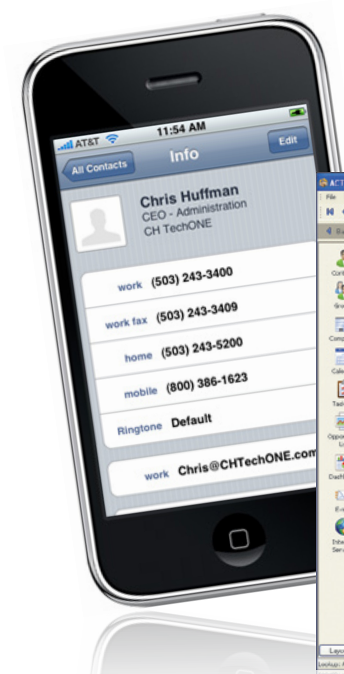
Install and deploy ACT! Premium Solutions using Silent Install[6] for rolling out the Windows product, establish a link and logins for rolling out the Web product, or provide both for each user. Once installed, setting up teams of users is accomplished quickly using team functions, like grouping team members to grant access and user permissions on multiple levels. In addition, maintaining ACT! and ensuring database health is easy with automatic database functions[3], including backup, maintenance, and sync, keeping information safe and up-to-date. Implementing and maintaining a solution to manage contact information has never been easier.

Support an Anywhere Workforce

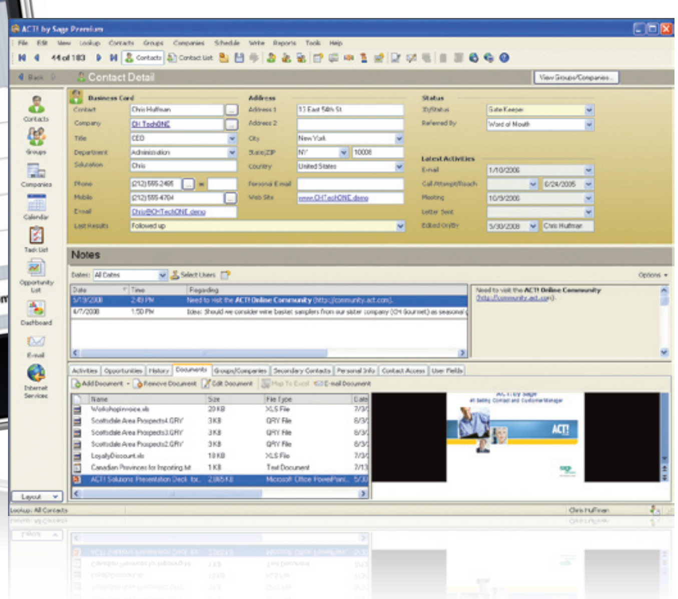
ACT! Premium Solutions are available for use in a standalone or mixed-use environment, allowing administrators to provide a solution that matches how each user in your organization works, and still enjoy the benefits of centralized customer data. Because the Windows and Web products are full-featured ACT! applications, you and your team truly receive seamless access options. Additionally, sync[2] ACT! to Palm OS®, Pocket PC, BlackBerry®[7], and iPhone[7] devices for all the power and convenience of ACT! on-the-go. Or, you and your team can access via Citrix® or Terminal Services[8]. With these options, you and your team can be productive wherever you are.

Enhance the Power of ACT! Premium Solutions with Extensibility Options

Utilize downloads available on ACT! Dev Net to extend ACT! functionality or add powerful enhancement solutions designed to expand core ACT! functionality, including e-mail marketing, quoting, analytics, and more—all available through third-party vendors[9]. Administrators with advanced technical skills can also make enhancements to ACT! with the ACT! Software Development Kit (SDK), OLEDB Provider, ACT! Reader, and SA Password tools.



Sync[2] ACT! to mobile devices for all the power and convenience of ACT! on-the-go. Note: iPhone solution[7] available through CompanionLink Software, Inc.



Utilize downloads available on ACT! Dev Net to extend ACT! functionality like the Middle Pane and Document Previewer shown here.

ARE YOU AND YOUR TEAM SCATTERED AMONG DIFFERENT OFFICES, WORKING REMOTELY, AND TRAVELING FREQUENTLY?

Consider using both ACT! Premium and ACT! Premium for Web. Deployment and use of both solutions provide you and your team with real-time access to important prospect and customer relationship details, whether you are office-based, traveling, or remote.

"With ACT! Premium, we always know exactly what opportunities are open, what stage they're in, and what the probability of closing them is. Not only does this help our sales team, but we use it to more accurately forecast our production and manufacturing."

—John Hrabosky, Earth Tool

"None of the other applications offered the features, the database flexibility, and the customization capabilities of ACT! Premium. Plus, ACT! is the easiest to use."

— Margaret Kelly,
Calvis Wyant Luxury Homes

Start using ACT! today!

Call 1-866-903-0006

Contact your ACT! Certified Consultant

Visit **www.act.com**

Key ACT! Premium Solutions Capabilities and Benefits:

- **Contact and Customer Management:** Centralize important prospect and customer relationship details for quick, organized access.
- **Company Management:** Manage interactions at the company or account level for a complete view of relationships with that organization.
- **Intuitive Interface:** Get up-to-speed quickly and remain productive with ACT! Premium Solutions because of the easy to learn and use interface—eliminating the need for formal training.
- **Lookups and Searching:** Find specific relationship details instantly using powerful search capabilities in an easy-to-use format.
- **Calendar and Activity Management:** Manage daily responsibilities by scheduling and tracking activities within ACT! Premium Solutions to ensure individual and team productivity.
- **Sales Opportunity Management:** Forecast and track sales opportunities to stay on top of all new leads and to provide management with insight into sales pipelines.
- **Dashboards and Reporting:** Gain instant and accurate insight into individual and team performance using Dashboards and reports.
- **Prospect and Customer Communications:** Communicate consistently and successfully with prospects and customers using Outlook or other e-mail solutions used by your organization.
- **Data Sharing and Security:** Share and secure precious prospect and customer relationship details across teams of users.
- **Codeless Customization:** Easily customize ACT! Premium Solutions, with little technical knowledge required, to fulfill the requirements of your organization and to ensure adoption.
- **Administration:** Deploy and implement ACT! Premium Solutions quickly and maintain with ease.
- **Anywhere Workforce:** Support an anywhere workforce with Windows, Web, and mobile access options.
- **Integration:** Integrate ACT! Premium Solutions with the applications already used by your organization to make the most of existing technology investments.
- **Extensibility:** Enhance the power of ACT! Premium Solutions with extensibility options available to administrators.

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 *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.*
2 *This feature is not available in ACT! Premium for Web.*
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 *Limited access group and company names will be viewable from the tree view, but all associated information will remain inaccessible.*
6 *Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate. Silent Install on Windows Vista® requires additional configuration.*
7 *Requires additional purchase.*
8 *Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0, 4.0, and 4.5.*
9 *Sage Software is in no way liable or responsible for any claims made related to products or services provided by third-party vendors.*

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 360º.

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.

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