

**ACT!**  
by Sage



## **ACT! 2008 (10.0) Product Tour** **For New Users**

# Keep Contact Details in One Place

*Keep important contact details in one place with ACT! so you have quick access to the information you need.*

Find anyone or any Contact detail instantly with Look-ups and Keyword Searches.

Store complete Contact information, including E-mail, Notes, History, and more.

Add virtually unlimited Secondary Contacts related to primary Contacts such as administrative assistants.

Consolidate and eliminate duplicate Contact, Group, and Company Records for the cleanest data.

Populate more than 60 pre-defined fields including Name, Company, Phone, Address, Web Site, E-mails, Last Meeting Date, and Status/ID.

Add documents or document shortcuts to Contact Records to keep track of proposals, quotes, and more.

The screenshot displays the ACT! by Sage software interface. The main window is titled "Contact Detail" and shows a form for a contact named Chris Huffman, CEO of CH TechONE. The form includes fields for Company, Contact, Salutation, Title, Department, Phone, Mobile, Fax, Address, City, State, ZIP Code, Country, Web Site, E-mail, Messenger ID, ID/Status, Spouse, Birthday, Referred By, Last E-mail, Edit Date, and Last Meeting. Below the form is a "Notes" section with a table of notes. The table has columns for Date, Time, Regarding, Record Manager, and Group/Company. Two notes are visible: one from 7/31/2007 at 2:49 PM regarding the ACT! Add-Ons website, and another from 7/16/2007 at 1:59 PM regarding wine basket samplers. The interface also shows a sidebar with navigation options like Contacts, Groups, Companies, Calendar, Task List, Opportunity List, Dashboard, E-mail, and Internet Services. The top menu bar includes File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Write, Reports, Tools, and Help. The status bar at the bottom indicates "Lookup: All Contacts".

Date	Time	Regarding	Record Manager	Group/Company
7/31/2007	2:49 PM	Need to visit ACT! Add-Ons website ( <a href="http://www.act.com/addons">www.act.com/addons</a> ).	Chris Huffman	
7/16/2007	1:59 PM	Idea: Should we consider wine basket samplers from our sister company (CH Gourmet) as seasonal gifts?	Allison Mikola	

Lookup: All Contacts

# Keep Contact Details in One Place

*Manage company/account information for a complete view of your prospects and customers.*

Link Contacts to Companies so when core Company information changes, the changes push to each Contact for easier updating.

The screenshot shows the ACT! by Sage software interface. The main window is titled "Company Detail" and displays information for "CH TechONE". The interface includes a left-hand navigation pane with icons for Contacts, Companies, Calendar, Task List, Opportunity List, Dashboard, E-mail, and Internet Services. The "Companies" icon is circled in black. The main content area is divided into several sections: "Hierarchy" (showing "CH Holding->CH TechONE"), "Company" details (including phone, fax, toll-free, web site, ID/status, referred by, and ticker), "Address" (13 East 54th St.), "City" (New York), "State" (NY), "ZIP Code" (10008), and "Country" (United States). Below these details is a "Divisions" list with "CH TechONE - Administration" and "CH TechONE - Sales". At the bottom, there is a "Contacts" tab and a table listing contacts associated with the company. The "Contacts" tab is circled in black. The table has columns for Contact, Company, Phone, Extension, E-mail, and Title.

Contact	Company	Phone	Extension	E-mail	Title
<a href="#">Ernst Anderson</a>	CH TechONE	(212) 555-2485		Ernst@CHTechONE.com	Vice President of US Operations
<a href="#">Betty Brower</a>	CH TechONE	(212) 555-2485		bbrower@CHTechONE.com	Sales Representative
<a href="#">Chris Huffman</a>	CH TechONE	(212) 555-2485		Chris@CHTechONE.com	CEO
<a href="#">Allison Mikola</a>	CH TechONE	(212) 555-2485		Allison@CHTechONE.com	Sales Representative
<a href="#">Melissa Pearce</a>	CH TechONE	(212) 555-2485		Melissa@CHTechONE.com	Assistant
<a href="#">Juliette Rosseux</a>	CH TechONE	(212) 555-2485		Juliette@CHTechONE.com	CFO
<a href="#">Jonathan Sommer</a>	CH TechONE	(212) 555-2485		Jonathan@CHTechONE.com	Vice President AsiaPac Operations
<a href="#">Sarah Whiting</a>	CH TechONE	(212) 555-2485		Sarah@CHTechONE.com	Vice President European Operations

Create new Company and Division records to get a more complete picture of the entire relationship.

Company records contain a roll-up of all Notes, History, and Opportunities associated with Contacts at that Company.

If a Contact is linked to a Company record, the company name will display as a hyperlink on that Contact Record for quick access to Company details.

# Keep Contact Details in One Place

*Manage groups of related contacts for easier tracking and communications.*

Create new Groups and Subgroups quickly and easily.

Save any look-up as a Group definition to create Groups instantly.

Easily see relationships using the Group Tree View for quick, easy navigation.

Further organize Groups into Subgroups, accommodating up to 15 hierarchies and up to 14 levels of Subgroups.

View shared Contacts, Notes, History, Activities, Opportunities, Documents in Group roll-up tabs.

The screenshot displays the ACT! by Sage software interface. The main window is titled "Group Detail" and shows a hierarchy of groups under "Customers". A "Subgroups" list is visible, including "Customers-AsiaPac", "Customers-European", "Customers-ONE Component", "Customers-TWO Component", "Customers-USA", and "Key Contacts". The "Contacts" tab is selected, showing a list of contacts with columns for Contact, Company, and Phone. An "Add/Remove Contacts" dialog box is open, showing options for "Static members" and "Dynamic members". The "Dynamic members" section includes a "Definition" table with the following data:

Field Type	Field Name	Operator	Value	And/Or
Contact	ID/Status	Contains	Customer	End

Create and maintain Static or Dynamic Groups. Static Groups allow Contacts to be added manually. Dynamic Groups allow Contacts to be added automatically based on Group definition.

# Keep Contact Details in One Place

*Enter virtually unlimited date- and time-stamped Notes and History to track every relationship detail.*

The screenshot displays the ACT! by Sage software interface. On the left is a navigation pane with icons for Contacts, Groups, Companies, Calendar, Task List, Opportunity List, Dashboard, E-mail, and Internet Services. The main window is split into two panes. The left pane shows 'Contact Detail' for 'Chris Huffman' of 'CH TechONE', with fields for Salutation, Title, Department, Phone, Mobile, Fax, City, State, ZIP Code, Country, and Web Site. The right pane is an 'Edit Note' window for contact 'Huffman, Chris [CH TechONE]' on '7/31/2007' at '2:49 PM'. The note text is 'Need to visit ACT! Add-Ons website (www.act.com/addons)'. A 'Private' checkbox is visible at the bottom of the note editor. Below the note editor is a list of notes with columns for Date, Time, Regarding, Record Manager, and Group/Company. The first note is highlighted in blue.

Date	Time	Regarding	Record Manager	Group/Company
7/31/2007	2:49 PM	Need to visit ACT! Add-Ons website (www.act.com/addons).	Chris Huffman	
7/16/2007	1:50 PM	Idea: Should we consider wine basket samplers from our sister company (CH Gourmet) as seasonal gifts?	Allison Mikola	

Filter by user, date, type, and more.

Share Notes and History between Contacts – update one and all corresponding Contacts will update automatically.

Mark notes private so only you have access to confidential data.

Use Rich Text Formatting to change colors, fonts, and text size.

Need to visit ACT! Add-Ons website (www.act.com/addons).

Highlight the note from a list of notes on one side of the split-panel to quickly view the full contents of that note on the other side of the split-panel.

# Manage Daily Responsibilities

*Manage daily responsibilities so important calls, meetings, and to-dos don't slip through the cracks.*

ACT! by Sage

File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help

Print Today Daily Work Week Weekly Monthly

Calendar: June 23 - June 27

Types: All Priorities: All Select Users

Contacts  
Groups  
Companies  
Calendar  
Task List  
Opportunity List  
Dashboard  
E-mail  
Internet Services

Monday, June 23 Tuesday, June 24 Wednesday, June 25 Thursday, June 26 Friday, June 27

2 am  
3 00  
4 00  
5 30  
6 00  
7 30  
8 30  
9 30  
10 00  
11 30  
12 pm  
1 30  
2 30  
3 30  
4 30  
5 30  
6 30  
7 30  
8 30  
9 30  
10 00  
11 30

Breakfast Club [Networking]  
Networking Breakfast

Philip Harvison [GreyBeard Trust,The]  
Prospect Call

Jonathan Sommer [CH Gourmet Gifts]  
Birthday Lunch

Meeting  
Regarding: Customer Thank You  
With: Lames Jawson [HAL's...]  
Date: Tuesday, June 24, 2008  
Time: 11:00 AM  
Duration: 1 hour 30 minutes

Juliette Rosseux [CH Gourmet Gifts]  
Weekly Finance Meeting

Lames Jawson [HAL's Consulting Corp]  
Customer Thank You

Gavin Dillerstone [Arcadia Ave. Florist]  
Customer Thank You

Baseball Practice for James (Wrigley)

European Sales Meeting  
Conference Call

10:00 AM - Juliette Rosseux  
Weekly Finance Meeting

5:00 PM  
Baseball Practice for James

June 2008

S M T W T F S

23 1 2 3 4 5 6 7

24 8 9 10 11 12 13 14

25 15 16 17 18 19 20 21

26 22 23 24 25 26 27 28

27 29 30 1 2 3 4 5

8 Activities - 1 Call, 7 Meetings, 0 To-dos, 0 Custom Activities

Quickly print displayed calendar.

View the Task List for a complete, filterable, list of all to-dos in one place

If you use Outlook®, utilize Outlook calendar sync so you always have a pulse on important meetings and to-dos whether they were scheduled in Outlook or ACT!.

Share calendars between users.

Mini-month calendar expands to up to one year.

A quick view of today's tasks. Incomplete tasks roll over to the next day.

Mouse over a scheduled activity for more detail.

# Communicate More Effectively

*Communicate more effectively with your contacts to build stronger relationships.*

Facilitate your daily communication with contacts using letter templates such as Initial Communication to Presentation Follow-up, and more.

Quickly identify your last communication with a contact by viewing the Last Reach, Last Attempt, Last Meeting, and Letter e-mail fields.

Select a contact or group of contacts and perform a mail merge to a letter or e-mail.

The screenshot displays the ACT! by Sage software interface. The main window shows the 'Contact Detail' for Chris Huffman, CEO of CH TechONE. The contact information includes address (13 East 54th St., New York, NY 10008), phone numbers, and website. A 'Last Results' table shows communication history:

Date	Time	Regarding
7/31/2007	2:49 PM	Need to visit ACT! Add-Ons website (www.act.com/addons).
7/16/2007	1:50 PM	Idea: Should we consider wine basket sample from our sister company (CH Gourmet) as seasonal gifts?

Below the contact details, there are two Microsoft Word templates open for mail merging. The first template, '02 Presentation - Follow - Up.tpl', contains a letter draft with merge fields like <Contact>, <Company>, <Address 1>, <Address 2>, <City>, <State>, <ZIP Code>, and <Salutation>. The second template, '01 Initial Communication - Direct Marketing Letter.tpl', is a more formal letter with similar merge fields and a detailed body text. The 'Open' dialog box shows a list of templates available for selection.

Link all correspondence to associated contacts for a complete record of everything sent and received.

Write letters using Microsoft® Word or the built-in Word Processor which supports tables, graphics, HTML, and spell checking.



# Improve Sales Opportunity Tracking and Visibility

*Forecast and track sales opportunities for insight into your pipeline.*

Export your opportunity list to Microsoft Excel for easy data analysis.

Choose from the ACT! Sales Cycle process and stages, or create your own.

Access, update, and filter your Opportunities.

The screenshot displays the ACT! by Sage software interface. At the top, there is a menu bar with options like File, Edit, View, Lookup, Contacts, Companies, Schedule, Write, Reports, Tools, and Help. Below the menu is a toolbar with various icons. The main window is titled 'Opportunity List' and features a sidebar on the left with navigation options: Contacts, Groups, Companies, Calendar, Task List, Opportunity List (highlighted), Dashboard, E-mail, and Internet Services. The main area contains a list of opportunities with columns for Contact, Company, Status, and a detailed table below. A 'Process/Stage' filter is set to 'All'. A probability filter is also visible, with options for 'All', 'Single Value', 'Greater Than', and 'Less Than'. An 'Opportunity Pipeline' window is overlaid on the main window, showing a funnel graph for 'Opportunity Pipeline 5/25/2007' for 'Chris Huffman'. The funnel has six stages: 4 Initial Communication (blue), 4 Needs Assessment (green), 1 Presentation (purple), 6 Negotiation (grey), 1 Commitment to Buy (red), and 1 Sales Fulfillment (yellow). The bottom status bar shows 'Lookup: All Opportunities' and '30 Opportunities, \$30,748.59 Weighted Total, \$50,033.09 Grand Total'.

See all Opportunities in one place by using the convenient, customizable Opportunity List view.

A probability percentage is linked to each sales stage, or can be overwritten.

Track Opportunities through the sales cycle with the Interactive Pipeline Graph. Click on any stage in the graph, and the Opportunity list quickly reflects those Opportunities.

# Improve Sales Opportunity Tracking and Visibility

*Forecast and track sales opportunities for insight into your pipeline.*

The screenshot displays the ACT! by Sage software interface. The main window shows an 'Opportunity List' with columns for Name, Item #, Quantity, Cost, Price, Adj. Price, Discount, and Subtotal. A dialog box titled 'Opportunity' is open, showing fields for Opportunity Name, Contact, and Forecast. A 'Follow Up...' button is highlighted. Another dialog box titled 'Manage Product List' is open, showing a table of product list items with columns for Name, Item Number, Cost, and Price.

Name	Item #	Quantity	Cost	Price	Adj. Price	Discount	Subtotal
Service Contract	SC	1.00	\$750.00	\$2,000.00	\$2,000.00	00000000 %	\$2,000.00

Name	Item Number	Cost	Price
ONE Component	ONE	\$1,000.00	\$2,500.00
Service Contract	SC	\$750.00	\$2,000.00
TechONE System	T1SYS	\$5,000.00	\$12,000.00
TWO Component	TWO	\$1,750.00	\$4,000.00

Associate with multiple Contacts, Groups, and Companies.

Easily add discounts to products.

Schedule follow-up activities directly from an Opportunity.

Create a product list for use by the entire team. Capture cost, item number, and price for consistency, and easily import your product list to avoid data entry.

# Use As-Is or Highly Customized

*Use ACT! as-is or highly customized to fit your needs.*

The screenshot shows the ACT! Layout Designer interface for a 'Basic Contact Layout'. The main window displays a grid of fields for a contact record, including Company, Contact, Salutation, Title, Department, Phone, Mobile, Fax, Address (Address 1, 2, 3), City, State, ZIP Code, Country, Web Site, E-mail, Messenger ID, ID/Status, Spouse, Birthday, Referred By, Last Results, Last Reach, Last Attempt, and Last Meeting. A 'Toolbox' on the left contains options like Drawing, Field, Pointer, Memo Field, Picture Field, Yes/No Field, Record Manager, and Access. Two dialog boxes are open: 'Manage Activity Types' and 'Manage Priorities'.

**Manage Activity Types**

Image	Name	Active
	Call	Active
	Meeting	Active
	To-do	Active
	Marketing Call	Active
	Personal Activity	Active
	Vacation	Active

**Manage Priorities**

Customize the names of the priority levels by clicking the "Edit..." button below. Use the checkboxes to activate or deactivate any level.

Name	Active
High	<input checked="" type="checkbox"/>
Medium-High	<input checked="" type="checkbox"/>
Medium	<input checked="" type="checkbox"/>
Medium-Low	<input checked="" type="checkbox"/>
Low	<input checked="" type="checkbox"/>

Add memo, picture, and yes/no fields so you can capture information that is required by your business.

Use the Layout Designer to change background colors or to add logos to your layout.

Create your own activity, history, priority, or other field types so ACT! is customized to your business.

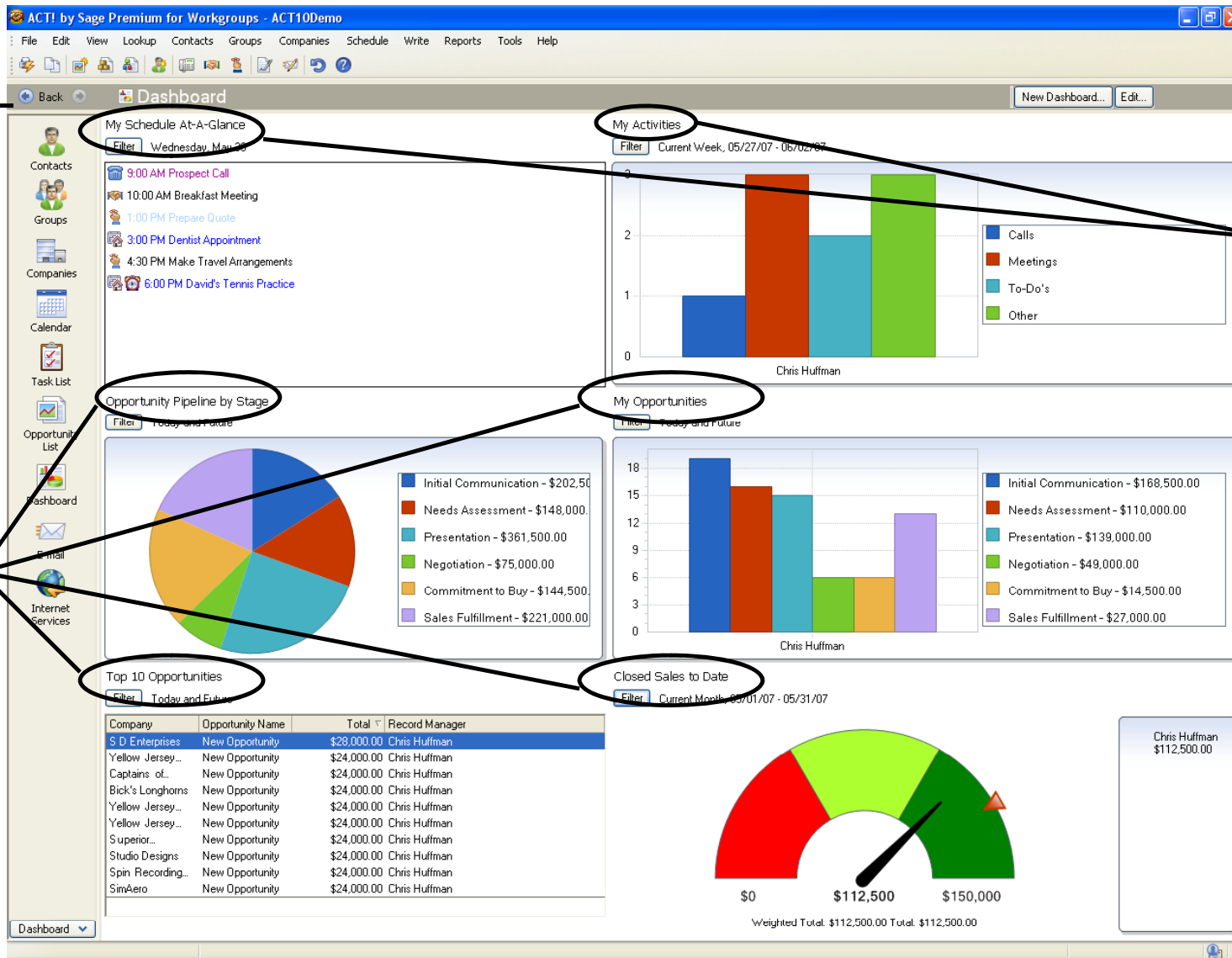
# Gain Insight into Performance

Get a comprehensive view of your top priorities and take action immediately with the Dashboard.

The Dashboard delivers an at-a-glance view of key ACT! information through six customizable components.

Additionally, the Dashboard includes opportunity information so you can quickly evaluate sales efforts.

With the Dashboard you get activity information that informs you of pending deliverables and how your time is allocated.



# Gain Insight into Performance

Gain insight into your performance to make more informed decisions.

Utilize the report designer to create custom reports and output most reports to Excel, HTML, PDF or e-mail.

One-click export to Excel allows you to export Contact, Group, Company, or Opportunity Lists to an Excel spreadsheet for sharing with non-ACT! users or for further analysis using built-in, customizable pivot tables.

Customize the reports that ship with ACT!, including 40 standard reports such as Contact Status, and 20 are pre-formatted Sales Reports such as the Pipeline Report.

The screenshot displays the ACT! by Sage software interface. The main window shows a 'Contact Detail' view for Chris Huffman at CH TechONE. The interface includes a menu bar (File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Reports, Tools, Help) and a toolbar with various icons. A sidebar on the left contains navigation options like Contacts, Groups, Companies, Calendar, Task List, Opportunity List, Dashboard, E-mail, and Internet Services. The main content area is divided into sections for contact information, last results, and a list of activities/opportunities. Three report windows are overlaid on the main interface:

- Contact Status:** A summary report for Chris Huffman, CH TechONE, showing 182 contacts. It lists details for a contact named George at Williams Consulting, including company, title, phone, and address.
- Pipeline Report:** A detailed report showing sales pipeline data for the date range 8/1/2007 - 8/31/2007. It is organized by stage (e.g., Commitment to Buy, Initial Communication, Needs Assessment, Negotiation) and lists individual opportunities with their status, value, and manager.

At the bottom of the Pipeline Report window, it says 'Created 8/15/2007 at 9:46:17 AM' and 'Page 1 of 2'.

# Easy to Learn and Use

*Be up and running quickly because ACT! is easy to learn and use.*

ACT! is easy to install with the step-by-step Installation Wizard and Getting Started Wizard to help you configure common preferences and settings.

Import data from your personal information manager including popular formats such as .cvs, Outlook, and Palm® Desktop eliminating the work involved in re-entering data.

Use the product Feature Tours for a walk thru of ACT! functionality to get you acquainted with the solution.

The screenshot displays the ACT! by Sage software interface. The main window shows the 'Contact Detail' view for Chris Huffman, CEO of CH Technology. The contact information includes address, phone numbers, and website. A callout box highlights the Help menu, which contains options like 'Feature Tours', 'Getting Started Wizard...', and 'ACT! Update...'. The interface includes a sidebar with navigation icons, a main contact information form, and a bottom section with a notes table and a right-hand panel.

Date	Time	Regarding	Record Manager	Group/Company
7/31/2007	2:49 PM	Need to visit ACT! Add-Ons website (www.act.com/addons).	Chris Huffman	
7/16/2007	1:50 PM	Idea: Should we consider wine basket samplers from our sister company (CH Gourmet) as seasonal gifts?	Allison Mikola	

# Access via Mobile Devices

*Access critical information while mobile or remote so you have ACT! data with you at all times.*



Sync ACT! to Palm OS®, Pocket PC, or BlackBerry\* devices for the contact and scheduling information you need.

\* Requires additional purchase.