



ACT! by Sage 2007 (9.0) Product Family Feature Comparison Chart

Bolded items indicate new or improved features in the 2007 release.

**Make contact.
Build relationships.
Get results.**

ACT! Product Family

With more than 2.5 million individual users and 35,000 corporate customers, ACT! is the #1 selling contact and customer management solution worldwide. The ACT! Product Family offers a range of solutions geared to individuals, small businesses, and corporate workgroups or teams to assist in increasing individual productivity, improving sales performance, and providing key insight into all customer interactions.

Sage Software offers flexible deployment options including Windows, Web-based, and mobile access solutions to provide timely access to critical contact and customer information. ACT! is renowned for exceptional end-user adoption, low overall total cost of ownership (TCO), and high return on investment (ROI) for both individuals and organizations.

| FEATURES | ACT! 2007 | ACT! Premium for Workgroups 2007 | ACT! Premium for Web 2007 |
|---|-----------|----------------------------------|---------------------------|
| ORGANIZE YOUR CONTACT DATA IN ONE PLACE | | | |
| Track complete information including attachments, documents, sales opportunities, e-mails, and more | ■ | ■ | ■ |
| 60+ pre-defined fields | ■ | ■ | ■ |
| Enter virtually unlimited date-and time-stamped Notes and History | ■ | ■ | ■ |
| Split-panel Note preview | ■ | ■ | ■ |
| Create Company records | ■ | ■ | ■ |
| Specify linked Contact/Company fields¹ | ■ | ■ | ■ |
| Update Company linked fields from a Contact | ■ | ■ | ■ |
| 15 hierarchies of Groups and Subgroups – dynamic membership | ■ | ■ | ■ |
| Attach documents to Activity and History items | ■ | ■ | ■ |
| Share Notes and History between Contacts | ■ | ■ | ■ |
| Rich Text Formatting – supports colors, bullets, graphics, URLs | ■ | ■ | ■ |
| Layout Designer | ■ | ■ | ■* |
| Customizable navigation bar | ■ | ■ | |
| Maintain private records | ■ | ■ | ■ |
| STAY IN TOUCH AND GROW BUSINESS RELATIONSHIPS | | | |
| Linked correspondence | ■ | ■ | ■ |
| Last Communication fields | ■ | ■ | ■ |
| Built-in word processor supports tables, HTML images, spell checking, and more! | ■ | ■ | ■ |
| Mail Merge using ACT! Word Processor or Microsoft® Word | ■ | ■ | ■ |
| Validate and correct addresses during mail merge | ■ | ■ | ■ |
| Pre-formatted templates | ■ | ■ | ■ |
| ACT! E-mail Client | ■ | ■ | |
| ACT! E-mail Client integrated with Lotus Notes ² | ■ | ■ | |
| Integration with Outlook® e-mail ³ | ■ | ■ | ■ |
| Use Outlook e-mail while in ACT!⁴ | ■ | ■ | ■ |
| Use ACT! as Outlook address book ³ | ■ | ■ | ■ |
| Resolve e-mail address and create ACT! History from Outlook⁵ | ■ | ■ | ■ |
| Attach Outlook e-mail to ACT! Contacts⁵ | ■ | ■ | ■ |
| Specify Outlook default History types⁵ | ■ | ■ | ■ |
| Create ACT! Contact from Outlook e-mail⁵ | ■ | ■ | |
| PRIORITIZE YOUR WORK | | | |
| Schedule calls, meetings, and to-dos | ■ | ■ | ■ |
| Track Activities | ■ | ■ | ■ |
| Rich Text Formatting in Activity details | ■ | ■ | ■ |
| Built-in Calendar with Calendar pop-ups | ■ | ■ | ■ |
| Five different calendar views | ■ | ■ | |
| Filter private activities | ■ | ■ | ■ |
| Create and edit Activity Series | ■ | ■ | |
| Activity conflict notification | ■ | ■ | ■ |
| Automatic rollover of Activities | ■ | ■ | ■ |
| Recurring Activities | ■ | ■ | ■ |
| View other users' Calendars | ■ | ■ | ■ |
| Set alarms | ■ | ■ | ■ |
| View global events | ■ | ■ | ■ |
| Paper organizers templates | ■ | ■ | ■ |
| Automatic Sync with Outlook Calendar³ | | ■ | |





For more information about ACT! Products:

- Call 1-602-281-4491
- 5 Users or more?
Call 1-602-281-4491 for Corporate Licensing
- Contact your ACT! Certified Consultant
Visit www.NextCRM.net

1 Not all fields can be linked and linked filed types must be compatible.
 2 Requires Lotus Notes 6.5.
 3 Requires Microsoft Outlook 2000, 2002, or 2003.
 4 Requires Microsoft Outlook 2000, 2002, or 2003. During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail Client or direct integration with Outlook.
 5 Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.
 6 Requires Microsoft Excel and Word 2000, 2002, or 2003.
 7 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.
 8 Only certain fields can be designated as read-only or no access.
 9 Delivered as an MSI package. Software to distribute MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.
 10 Citrix and Terminal Services Require specific configurations. Citrix supported using Presentation Server V3.0 and V4.0.

| FEATURES | ACT! 2007 | ACT! Premium for Workgroups 2007 | ACT! Premium for Web 2007 |
|--|-----------|----------------------------------|---------------------------|
| FORECAST AND TRACK SALES OPPORTUNITIES | | | |
| Forecasting tools | ■ | ■ | ■ |
| Opportunity List View | ■ | ■ | ■ |
| Customize sales processes | ■ | ■ | ■ * |
| Generate product list | ■ | ■ | ■ * |
| Import product list | ■ | ■ | ■ * |
| Track multiple products | ■ | ■ | ■ |
| Opportunity Lookups | ■ | ■ | ■ |
| Customizable Opportunity fields | | ■ | ■ |
| Drop-down lists in Opportunity fields | | ■ | ■ |
| Instant quotes ⁵ | ■ | ■ | |
| Sales reports | ■ | ■ | ■ |
| Pipeline report | ■ | ■ | ■ |
| Export to Excel ⁶ | ■ | ■ | ■ |
| Schedule from an Opportunity | ■ | ■ | ■ |
| GET A COMPLETE VIEW OF CUSTOMER INTERACTIONS | | | |
| Advanced Keyword Search | | | |
| Quick Search | ■ | ■ | ■ |
| Save Lookups as Groups | ■ | ■ | ■ |
| Lookup ranges | ■ | ■ | ■ |
| Lookup Indicator | | | |
| Edit within Queries | | | |
| 40+ standard reports | ■ | ■ | ■ |
| Report Designer | ■ | ■ | ■ * |
| Field types – picture, Yes/No, memo, e-mail | ■ | ■ | ■ * |
| Customize drop-downs; utilize multi-select values | ■ | ■ | ■ |
| Share drop-down lists across different fields | ■ | ■ | ■ |
| Custom Activity types | ■ | ■ | ■ * |
| Custom History types | ■ | ■ | ■ * |
| Custom Priority types | ■ | ■ | ■ * |
| SECURELY ADMINISTER AND DEPLOY TO WORKGROUPS & TEAMS | | | |
| Increased scalability to accommodate your workgroup or team ⁷ | | | |
| 5 security levels for users | ■ | ■ | ■ |
| Custom user permissions | | ■ | ■ |
| Grant Contact access en masse | | ■ | ■ * |
| Lookup Contacts by access | | ■ | ■ * |
| Password expiration options | ■ | ■ | ■ * |
| Complexity of a password | ■ | ■ | ■ * |
| Password re-use | ■ | ■ | ■ * |
| Field level security⁸ | | ■ | ■ |
| Secure Notes, History, and Opportunities en masse | ■ | ■ | ■ * |
| Automatic database sync | | ■ | ■ * |
| Automatic database backup | | ■ | ■ * |
| Automatic database maintenance | | | |
| Silent install ⁹ | | ■ | |
| Eliminate duplicate Records | ■ | ■ | ■ * |
| Prevent duplicate Records | ■ | ■ | ■ |
| ACCESS CRITICAL INFORMATION WHEN MOBILE OR REMOTE | | | |
| Citrix ⁹ /Terminal Services support ¹⁰ | ■ | ■ | |
| Synchronize Palm OS [®] | ■ | ■ | |
| Synchronize Pocket PC | ■ | ■ | |
| Works with ACT! for Palm OS | ■ | ■ | |
| INTEGRATE WITH ACCOUNTING SOFTWARE | | | |
| Peachtree by Sage | ■ | ■ | |
| QuickBooks [®] Professional and QuickBooks Premier | ■ | ■ | |

* Asterisks in this chart denote items that must be completed in the ACT! Premium for Web server installation, which utilizes ACT! Premium for Workgroups software.



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