



How Does ACT! Help you?

Maximizing sales efficiency and productivity is a key challenge for many sales organizations. We're here to help. With more than 35,000 corporate customers, ACT! continues to be the #1 selling contact and customer manager with organizations because it's extremely intuitive and easy to use for sales reps, providing rapid end-user adoption, and it provides organizations with the centralized administration, advanced contact and user security, and flexible deployment options they need to maximize sales productivity and revenue.

Working in disparate systems without a complete view of all your contacts and customers?

ACT! is a single central repository for all of your critical customer information including detailed contact information, activities and to-dos, recent communications, e-mails, documents such as quotes and proposals, sales opportunities, and reports. Import data from existing solutions (.txt and .csv files and Microsoft® Outlook®) so you have everything in one place.

Does your organization need to get a handle on Opportunities so you stop losing business?

Sales professionals and sales management will always know where they stand using the opportunity management features within ACT!. View all sales opportunities at once or filter by *Users, Estimated Close, Date, Status, Sales Stage, Amount, or Probability of Close*. ACT! enables sales professionals to track sales opportunities from initial inquiry through close utilizing the standard sales process or a process you have customized to suit your way of doing business. You can track multiple products on each opportunity and specify product discounts and costs for each item.

Want to ensure your sales team rallies behind the solution you select to ensure productivity?

ACT! is the #1 selling contact and customer manager for both individuals and corporate customers for one key reason – sales people love to use it! Functionality in ACT! has evolved to include critical components for corporate workgroups such as scalability, centralized administration, security, and flexible deployment options, while maintaining the ease of use and intuitive interface design that has led to excellent end user adoption over the years.

Losing e-mail communications because your users are using Microsoft Outlook?

Many ACT! users work in organizations that use Microsoft Outlook as the defacto calendar and e-mail program, but that doesn't mean you cannot capture that information in your sales automation solution, quickly and easily. That's why ACT! delivers one of the most robust integrations with Outlook available on the market today. With ACT!, you can perform key e-mail and calendaring task in either ACT! or Outlook and ensure the data is still captured on your ACT! Contact Record. Examples include using the Outlook new e-mail message form from within ACT!, creating a history on the ACT! contact record when sending an e-mail from Outlook, creating an ACT! contact from an Outlook e-mail, and synchronizing your ACT! and Outlook calendars to facilitate appointment scheduling with company employees not using ACT!.¹

Do you need a way to send out timely communications to your key customers such as HTML e-mails or renewal letters?

To advance your business, you need to enable sales reps to automate timely, personalized



communications to prospects and customers such as marketing promotions, key announcements, renewals, etc. Using the ACT! built-in Word Processor or through integration with Microsoft Word, you can create personalized correspondence including mail merge letters, e-mail, envelopes and/or labels. ACT! offers several pre-formatted templates for HTML e-mails, letters, and memos to save you time. You can customize those or create your own. All of these communications, even when done using mail merge, are linked to each individual contact for a complete record of what correspondence has been sent.

Tired of looking at solutions that don't offer multiple deployment and access options for your unique business?

Sage Software offers multiple ACT! solutions to meet the needs of your diverse team, whether its employees that work in the office, travel frequently, or work remote. ACT! Premium for Workgroups and ACT! Premium for Web are available for use in a standalone or mixed use environment, enabling you to provide a solution that matches how each individual user in your organization works, and still enjoy the benefits of centralized customer data. ACT! Premium for Workgroups and ACT! Premium for Web are both full-featured ACT! applications, unlike many other SFA solutions on the market. Because these products can share the same database, it is invisible as to which team members are using the Windows product and which are using the Web product. If a Windows based solution is ideal for your organization, ACT! Premium for Workgroups can be deployed using Silent Install2, quickly and easily. The product may be accessed using Citrix or Terminal Services3 for remote access.

Are you spending too much time maintaining a database and not enough working with sales reps on closing deals?

Centralized administration in ACT! Premium for Workgroups and ACT! Premium for Web allows for quick user setup and easy ongoing maintenance to meet the needs of larger teams and workgroups. When setting users up in the database, administrators can utilize the teams function to group users and easily grant contact access by team. Once users are setup, from a Contact List view, select multiple contacts and specify which users/teams have access to those contacts.⁵

In addition, you can lookup contacts based on which users/teams have access them. For ongoing database health, utilize automatic database synchronization, automatic database backup, and automatic database maintenance to ensure critical customer information is kept up to date. Once set up, only remote user involvement required is that their computer must be turned on at the scheduled time.

Concerned about the light or non-existent security features in your current solution?

ACT! Premium for Workgroups and ACT! Premium for Web offer additional features for managing security by user, by contact, and by field. You can assign up to five security levels including *Manager* and *Restricted* to all users, to allow different access to data and features depending on user levels. Contact data can be marked as *public*, *private*, or you can limit the access to specific users or teams. *Field level security* allows administrators to restrict access by user and/or team to certain fields. Define *read-only access* for particular users and/or teams so they can view the field, but are blocked from editing or deleting. Or, select *no access* to completely hide the field's contents from particular users and/or teams including fields related to personal or financial information such as addresses and credit card information. Finally, *password rules* in the areas of password expiration options, password complexity, and password re-use allow you to keep your critical contact and customer information secure.⁵



Want to customize key aspects of the application at the database level, but still allow for some individual user customizations to ensure adoption?

Unlike many market solutions today, ACT! enables you to make customizations for the entire organization, while still allowing for individual user customizations to ensure rapid adoption. For example, while you may set a default layout for your team with mandatory fields and drop down lists, users can still adjust the look of ACT! on their individual machines by customizing list view columns, menus and toolbars, the navigation bar, and even adjusting the Contact Detail view splitter. Another example is within *opportunities* you can customize the sales process for your users to ensure they are moving prospects through a sales process approved by your organization. Within each opportunity you can set a product list and default prices for that product, while still allowing individual users to adjust the price as required for discounts.

Would you like to improve the predictability of your business?

ACT! enables sales professionals to track sales opportunities from initial inquiry through close utilizing the standard sales process or a process customized to suit their business. Sales opportunities can be viewed all at once or filter by *Users, Estimated Close, Date, Status, Sales Stage, Amount, or Probability of Close*. You can track products on each opportunity and specify product discounts and costs for each item. You can also generate instant quotes from the opportunity without having to key in additional information. When working an opportunity, you can simply click *follow-up* and a new activity will be created automatically with the opportunity details – ensuring the prospect is managed as it moves through the process. As the month or quarter progresses, utilize the graphic *Sales Pipeline* to drill down on the opportunity details or one of the more than 20 sales reports to forecast what deals are going to close this month and how much revenue that could bring to your business, so you know which prospects and customers to focus your attention on in the coming days or weeks.