



ACT!

ACT! 2010 New Features Chart

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Learn More About ACT! 2010 New Features

Newly Designed Look	
Easier to learn and use navigation	<ul style="list-style-type: none"> Streamlined layouts Proven 25% increase in productivity over our competition¹
Instant access to search	<ul style="list-style-type: none"> Instant access to search from any view—no longer going through the lookup dialog
Related tasks	<ul style="list-style-type: none"> Related tasks provide users with more options for working with contacts, groups, opportunities, and more
Consolidated menus	<ul style="list-style-type: none"> Consolidated menus with relevant feature options
Big “easy” buttons	<ul style="list-style-type: none"> Big “easy” buttons for tasks users complete most often A New button that lets users create anything new, from contacts to activities, and more
Social Media Integration	
Integration with social networking sites and online resources	<ul style="list-style-type: none"> Automatically integrates profiles and data with ACT! for instant knowledge about customers such as their interests, past work history, and connections Sites included with ACT! are: <ul style="list-style-type: none"> LinkedIn® Facebook Plaxo ZoomInfo Contact Contact's Web site Google™ Google Driving Directions Google Maps™ Google News™ Weather Yahoo! Local Info Yahoo! Person Dynamic display of contact and company data Users can also add new Websites of their choosing and include dynamic search parameters Customizable searches based on field values Tab can be expanded for a larger view

¹Based on a Keystroke Level Modeling competitive study conducted by Sage and Measuring Usability, LLC in May 2009. Competitors include Microsoft Dynamics® CRM and Salesforce.com.



ACT! E-marketing*

End-to-end E-marketing includes:	<ul style="list-style-type: none"> Automatically reaches out to ACT! contacts, runs e-mail marketing campaigns in minutes, and delivers results into the ACT! contact record
<ul style="list-style-type: none"> E-mail marketing 	<ul style="list-style-type: none"> Allows users to create striking e-mail templates with a simple online editor Templates can be easily previewed and edited before sending Sends mass e-mails to contacts, lookups, groups, and companies with a single click directly from ACT! Tracks contacts who opened and clicked e-mails
<ul style="list-style-type: none"> Drip marketing 	<ul style="list-style-type: none"> Creates a series of e-mails that are delivered to ACT! contacts over a period of time—automatically Helps to drive sales processes by delivering call lists of contacts that should be called first
<ul style="list-style-type: none"> Survey and Web forms 	<ul style="list-style-type: none"> Gathers valuable feedback from existing contacts to help build and grow the user's ACT! database Survey results are mapped to ACT! fields to ensure the freshest data is available for marketing and selling purposes
<ul style="list-style-type: none"> Marketing Results tab 	<ul style="list-style-type: none"> Includes a ranked call list of the most interested contacts so users know who to call first For example, if Chris Huffman opens an e-mail five times and clicks three links, she is ranked as more interested than another contact that only opened an e-mail once and didn't click on any links
<i>*requires additional subscription</i>	

Customizable Opportunities

Redesigned sales tracking functionality	<ul style="list-style-type: none"> Sales opportunities now behave and appear like contacts, groups, and companies making them more flexible Users can now: <ul style="list-style-type: none"> Tailor opportunities to fit within their selling model Add new fields and tabs Customize² the product/service grid to include the fields needed to track information Associate multiple contacts to each sales opportunity Personalize the layout with colors and graphics that best represent the look of their business Track activities, history, documents, notes, and more—all tied to the sales opportunity Set security options
Two new sales processes	<ul style="list-style-type: none"> New technology process

² In ACT! Premium for Web, some customizations must be done on the Web server.

	<ul style="list-style-type: none"> Promotional sales cycle
Instant quotes in ACT! Premium for Web	
Custom Reports via New Connector for Third-party Report Writer	
New connector for third-party report writer	<ul style="list-style-type: none"> New connector for third-party report writers (such as Crystal Reports[®]), or OLEDB Provider, enables users to run reports on everything they keep in ACT! including: <ul style="list-style-type: none"> User information Activities Groups Companies
Streamlined Reports View	
Streamlined reports view	<ul style="list-style-type: none"> Users can now easily understand which ACT! reports are available to them Mark reports as favorites for quick access Customize report descriptions for a view that's more personalized to their needs
Report menu	<ul style="list-style-type: none"> For users accustomed to using the report menu, it is still available in ACT! 2010
New Dashboards	
Twelve new dashboard charts	<ul style="list-style-type: none"> Recently Created Contacts Recently Edited Contact Contact History Count by History Type Contacts by Country Contacts by Department Opportunities Open by Product Opportunities with Contact Info Opportunities by Products Opportunity Weighted Total by Stage Remote Database Information by User Remote Database Sync Status by User User Status
Two new default dashboards	<ul style="list-style-type: none"> Contacts Dashboard Administrative Dashboard
New Opportunity Reports	
Thirteen new opportunity reports	<ul style="list-style-type: none"> Opportunities by Record Manager and Process Opportunity Summary by Record Manager and Process Opportunities by Process and Status Opportunities by Estimated Closing Month Won Opportunities and Days Open Won Opportunity Summary by Sales Process



	<ul style="list-style-type: none"> • Won Opportunities by Sales Process and Competitor • Won Opportunities by Sales Process and Reason • Won Opportunities by Sales Process and Record Manger • Won Opportunities by Sales Process • Won Opportunities by Actual Closing Month • Pipeline Report by Sales Process and Stage • Pipeline Report and Products by Sales Process and Stage
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New Welcome Page

New Welcome Page	<ul style="list-style-type: none"> • Quick access to common resources, tips on using ACT!, where to go for help, ACT! news, and more from the ACT! Welcome page • ACT! news section will feature the latest information on product updates • Corporate admins can modify the Welcome page • Dynamic content based on user types
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Compatibility with iCalendar and vCard

Send calendar invitations from ACT! to leading e-mail solutions	<ul style="list-style-type: none"> • Send ACT! calendar invitations to customers who use iCalendar connected calendars • These include: <ul style="list-style-type: none"> - Gmail™ - Apple® iCal® - Windows Live™ - Microsoft® Outlook® - Facebook - GroupWise® - Lotus Notes® • Invitations sent will appear on their calendar • Receive iCalendar invitations in ACT!³
Share ACT! contacts in vCard format	<ul style="list-style-type: none"> • Send ACT! contacts in vCard format to non-ACT! users • No retyping or cutting and pasting required

New Functionality in ACT! Premium for Web

Now available in ACT! Premium for Web with Microsoft® Word	<ul style="list-style-type: none"> • Mail merge • Instant quotes
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New Activity Series Templates

Three new activity series templates	<ul style="list-style-type: none"> • Confirmation Information Change • Key Customer Communication Series • New Project Series
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³ Not available in ACT! Premium for Web.

Corporate Implementation Benefits

Create remote databases simultaneously	<ul style="list-style-type: none">• Create up to 50 remote databases simultaneously for easy rollout of larger implementations
User-defined currency settings	<ul style="list-style-type: none">• Support global selling environment by specifying currency at the time of database creation
Automated answer file (Silent Install)	
Simplified registration and installation process	<ul style="list-style-type: none">• Simplified registration process with fewer required screens• Simplified installation with a new option for typical install, bypassing all installation questions (custom install still available)

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