



## What's New in ACT! by Sage Solutions 2009 (11.0)?

### **Work More Effectively, Maximize Productivity, and Better Serve Your Contacts**

Feedback from customers like you who work with ACT! every day is invaluable to us—in fact, we rely on it when we develop new versions. We observe how customers work with ACT! and ask what would help them work even more effectively. Experience the results for yourself in ACT! Solutions 2009.

You receive powerful new features and significant enhancements to areas of the product that you use every day, such as Microsoft® Outlook® integration, calendar and activity visibility, and search functionality. All this enables you to work more effectively, become more productive, and better serve your contacts.

### **Tighter Outlook Integration Provides Options for Tracking and Organizing E-mail**

New and improved Outlook integration features afford you the flexibility to track and organize e-mails in ACT! en masse or on a case-by-case basis. Or, automate these functions so you can set them once and forget about them. Calendar integration features enable you to create ACT! activities from Outlook for tracking important action items received via e-mail, and copy your ACT! and Outlook calendars automatically<sup>1</sup> or with just one click.

### **Greater Calendar and Activity Visibility Help You Stay On Top of Your Day**

Improvements to calendar printing and viewing make it easy for you to get relevant snapshots of your schedule and give you a heads up on your scheduled activities at-a-glance. This way you can stay on top of your day and realize maximum productivity gains.

### **Powerful Lookups and Search Functionality Quickly Give You the Details You Need**

Lookups and search functionality have been streamlined, helping you find the particular contact or contact details you need quickly, in one lookup-friendly place. Build the most basic or complex searches using a tool that has been simplified and enhanced. And easily recall recent lookups to save time in your day.

### **More Database Functions<sup>2</sup> and Automation Options Help Maintain ACT! Details**

With more database functions and automation options, you can spend time managing what is most important to your bottom line and feel confident your ACT! details are fully maintained. Now, ACT! automatically handles periodic database maintenance tasks and provides you with a variety of options for tailoring maintenance to fit your needs. Additionally, know exactly how your ACT! sync is progressing with the streamlined progress bar, reduce the size of your backup files by excluding attachments, and more.

## **# 1 SELLING CONTACT AND CUSTOMER MANAGER**

### **Why Upgrade?**

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You use Outlook.

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You rely on your schedule.

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You search for details in ACT!.

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Your ACT! data is valuable.

## **CUSTOMERS LOVE ACT! 2009!**

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*"Big improvement. Well done!"*

*"I am looking forward to using this version."*

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*"Fantastic upgrades."*

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## CUSTOMERS LOVE OUTLOOK INTEGRATION

*"Extremely impressive!"*

*"Great time saver."*

*"Awesome features!"*

*"I like the tighter integration  
with Outlook a lot."*

## Top Reasons to Upgrade

**1. Tighter Outlook Integration:** New and improved Outlook integration features provide you with multiple options for tracking and organizing e-mails in ACT!, as well as staying on top of your day.

### Features include:

- On-the-Fly E-mail History Recording:** Select the ACT! history option you want recorded for Outlook e-mail messages to your ACT! contacts directly from each Outlook e-mail message. Base the history option you choose on the significance of each individual e-mail you send.
- On-the-Fly E-mail History Recording in Multiple Databases:** Keep a complete record of all your Outlook e-mail communications in ACT! for easy referencing, whether you are using one or multiple databases, with the ability to change the ACT! database on-the-fly when attaching Outlook e-mails.
- En Masse E-mail Attaching:** Select multiple Outlook e-mails and quickly attach those e-mails en masse to corresponding ACT! contacts at once for a complete record of all your communications.
- Flexible Outlook Rules and ACT!:** In ACT!, you now have the option to use Outlook Rules, combining all the flexibility of Outlook Rules with a custom action you set for getting e-mails into ACT!. This "power user" feature enables you to manage e-mail messages received in your Inbox automatically, based on the criteria you set in Outlook Rules.
- E-mail Send from the Notes Preview Pane:** E-mail addresses are displayed as hyperlinks within the Notes preview pane so when you click on the e-mail address, a "send e-mail message" window opens with the e-mail address automatically populated in the "to" field, making it easy to communicate.
- ACT! Activity Scheduling from Outlook E-mails:** Easily schedule ACT! activities from Outlook e-mail messages when you receive an e-mail requiring any type of action, so you can stay on top of your responsibilities and maintain valuable information in ACT!.
- Automatic Calendar Copy<sup>1</sup>:** Automatically copy your ACT! and Outlook calendars using the ACT! Scheduler. This keeps your schedule up-to-date throughout the day, without manual updating.
- One-Click Calendar Copy:** Copy your ACT! calendar to Outlook or your Outlook calendar to ACT! with just one click by accessing the calendar copy option directly from the main ACT! toolbar.
- Streamlined ACT! Setup Assistant for E-mail and Calendar Integration:** Configuring the ACT! e-mail client and/or e-mail and calendar integration with Outlook is easy using the streamlined ACT! Setup Assistant. Using non-technical terminology, the ACT! Setup Assistant walks you through each of the steps.

**ACT! History** None Private

None  
 Email subject only  
 Email subject and message (for connected)  
 Email subject, message and all attachments

Subject: Quote Follow-up

June 25, 2008

Chris Huffman  
 CII TechONE  
 13 East 54<sup>th</sup> Street  
 New York, NY 10008

Dear David:

I wanted to send you a quick note to remind you that the terms and pricing for the enclosed quote are still good for several weeks.

If you're a smart shopper you may have been looking at some of our competitor's pricing and products or thinking of other ideas that might be slightly different from the one we originally quoted. If there are other ideas you have and want prices for, I'd be happy to re-quote your job based on those ideas.

Select the ACT! history option you want recorded for Outlook e-mail messages to your ACT! contacts directly from each Outlook e-mail message.

Select multiple Outlook e-mails and quickly attach those e-mails en masse with "Quick Attach" to corresponding ACT! contacts.

Quick Attach

ACT! e-mail client and/or e-mail and calendar integration with Outlook is easy using the streamlined ACT! Setup Assistant. Using non-technical terminology, the ACT! Setup Assistant walks you through each of the steps.

**2. Greater Calendar and Activity Visibility:** Improvements to calendar printing make it easy to get relevant snapshots of your schedule, while improvements to calendar viewing give you a heads up on your schedule at-a-glance.

## CUSTOMERS LOVE CALENDAR AND ACTIVITY VISIBILITY

### Features include:

- **Calendar Filters Applied on Printouts:** Print your ACT! calendar with the full benefit of the filters you have selected applied, including type, priority, date range, and users. This eliminates the need to re-set your print filters to match your ACT! calendar filters.
- **Contact Names on Monthly Printouts:** Easily see who is included in your upcoming meetings by viewing the contact names associated with any activity you have scheduled in ACT!, right there on your monthly calendar printouts.
- **First Name for Multiple Contact Meetings Viewable At-a-Glance:** Quickly determine who is included in the activities you have scheduled by mousing over that activity on your calendar and viewing the name of the first contact listed, not just “Multiple Contacts.”
- **Activities Viewable for Teams Larger than 10:** View the activities of all your team members, even if the team is larger than 10, to better understand the level of activity and types of activities your team has scheduled.

*“Good options!”*

*“Excellent! I love it.”*

*“Well done, simple and effective.”*

**3. Powerful Lookups and Search Functionality:** Lookups and search functionality have been streamlined, helping you find the details you need quickly, in one lookup-friendly place.

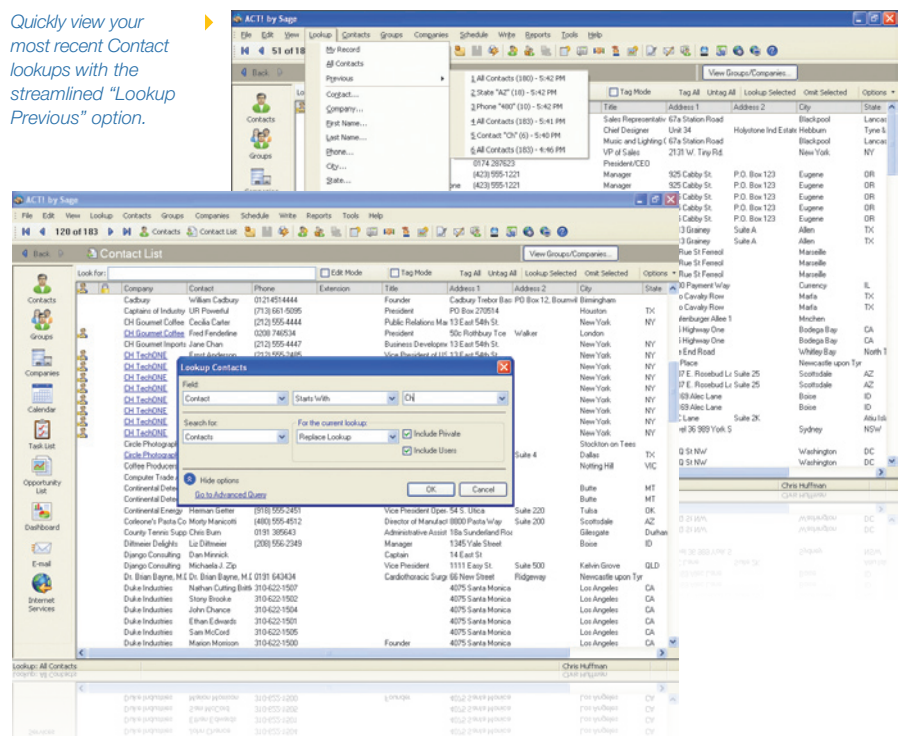
## CUSTOMERS LOVE LOOKUPS

### Features include:

- **Easy and Powerful Lookups:** ACT! Lookups have been streamlined to better meet your search needs, enabling you to quickly find data of interest. The “Lookup” dialog has not only been simplified, it has been enhanced with powerful search capability:
  - **Fast Access to Previous Contact Lookups:** Quickly view your most recent Contact lookups with the streamlined “Lookup Previous” option containing the last several lookups you conducted. These lookups are categorized by: the lookup type, a date- and time-stamp, and how many contacts were in the query. Next time you are multi-tasking, you can get back to the Contact lookup previously conducted with ease.
- ▶ Lookups are based on additional search operators enabling you to find what you are searching for based on only part of the name or title. For example, when searching for contacts with manager in the title, you can simply search on the word “manager” and find all titles with that word such as sales managers, IT managers, and so on.
- ▶ You have the option to switch entities like Contact, Group, and Company, giving you the flexibility to modify your search without having to start the Lookup from scratch.
- ▶ Access to the “Advanced Queries” option is located in the main Lookup screen. The last lookup you performed will carry over so you can define your search even further without having to exit your current lookup.

*Quickly view your most recent Contact lookups with the streamlined “Lookup Previous” option.*

*ACT! Lookups have been simplified and enhanced with powerful search capability, enabling you to quickly find data of interest.*



## Upgrade today!

Call 1-866-903-0006

Contact your ACT! Certified Consultant

Visit [www.act.com/upgrade](http://www.act.com/upgrade)

**4. More Database Functions<sup>2</sup> and Automation Options:** ACT! now automatically handles periodic database maintenance<sup>2</sup> tasks and provides you with many options for tailoring maintenance to fit your needs.

### Features include:

- **Automate Important Tasks:** Automate important tasks, including calendar copying<sup>1</sup>, database backups, and database maintenance in ACT! using the ACT! Scheduler. This keeps your database up-to-date, safe, and secure throughout the day, without manual updating.
- **Hourly Time Options for Automating Important Tasks:** New time options are available for automatic calendar copying<sup>1</sup>, database backups, and database maintenance in the ACT! Scheduler, giving you the flexibility to automate these functions multiple times a day with the hours you specify.
- **Simplified Installation of a Remote Database:** Installation of a remote database has been significantly simplified, reducing the number of clicks required by approximately half. You no longer need to work through various menu options for installing a remote database. All you need to do is open or double-click the ACT! RDB file, click “ok,” and ACT! does the rest.
- **Streamlined Sync Progress Bar:** Know exactly how your ACT! sync is progressing with the streamlined ACT! sync progress bar, including five steps with easy-to-understand terminology per step. You can see the length of time it will take for your sync to complete and determine which sync steps completed successfully.
- **Option to Exclude Attachments from Backups<sup>2</sup>:** Reduce the size of your backup files by excluding attachments from ACT! database backups, allowing your backups to complete more quickly, particularly if you have a large number of attached documents.
- **Quick Information for Logged-in Users:** View the name of the logged-in user, the date and time of the last login, and the user's ACT! security role by mousing over the username included in the lower right corner of the screen. This eliminates the guesswork for ACT! administrators while configuring ACT! on other team members' computers.

**Important Note:** Sage Software recommends you review ACT! 2009 Solutions system requirements at [www.act.com/2009systreq](http://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](http://www.actsolutions.com) or check with your add-on product provider to determine compatibility.

**Important Note for Customers Using ACT! 2004 (6.0) or Prior:** Customer activation and registration are required to use ACT! Solutions. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e-mail/modem-based database synchronization, and SideACT!.

<sup>1</sup> This feature is not available in ACT! Premium for Web.

<sup>2</sup> In ACT! Premium for Web, administrative functions must be performed on the Web server.

## 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.



End-to-end solutions. Expert advice.  
Premium support. That's Sage 360°.

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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