

A decorative graphic on the left side of the slide, featuring several thin, curved lines in shades of green and yellow, interspersed with various sized circles and teardrop shapes in shades of green and yellow.

Sage ACT! 2011

What's New?

Why Sage ACT! 2011?



Make contact. Build relationships. Get results.

- ✓ Automate key activities with Smart Tasks
- ✓ Eliminate double-entry with Sage ACT! and Outlook® sync
- ✓ Unlock a rich source of new leads with Sage Business Info Services for ACT!—powered by Hoover's™

Smart Tasks



- Benefit:
 - Automate key activities with Smart Tasks to help handle everyday details, such as sending emails for you or putting activities on your calendar.
- Features:
 - 10 pre-loaded Smart Tasks for common activities with accompanying email marketing templates
 - Apply right out-of-the-box or simply edit to personalize
 - Suitable for general productivity or sales efforts
 - Easy-to-use and intuitive visual designer* lets anyone create or manage Smart Tasks—unlike complicated designers in market
 - Control the timing, contact lists, and opportunities for each Smart Task

* In the Sage ACT! Premium web client, administrative functions must be performed on the web server.

Smart Tasks

The screenshot displays the 'Manage Smart Tasks' window. It features a 'Templates' tab and a 'Status' tab. A list of Smart Task templates is shown, including 'Birthday Reminder', 'Closed Opportunity Follow Up', and 'E-marketing: Birthday Greeting'. A 'Smart Task Status' dialog box is open, showing a table of task instances with columns for 'Smart Task', 'Started Record', 'Status', and 'Start Date'. The dialog also includes filters for 'Smart Task', 'Status', and 'Started', and buttons for 'Pause', 'Resume', and 'Cancel'. A 'Close' button is visible at the bottom right of the main window.

Smart Task	Started Record	Status	Start Date
New Contact Process	Joe Blow	Canceled	2009/11/25
New Contact Process	Lee Horgan	In Progress	2009/11/24
Birthday Reminder	Ashley Allan	In Progress - Awaiting User	2009/11/23
Birthday Reminder	Mary Baily	Completed	2009/11/23
Birthday Reminder	Will Blake	Completed	2009/11/23
Opportunity a week from close	Burley Detective Agency	Completed	2009/11/23
Opportunity a week from close	New Opportunity	Paused	2009/11/23

Quick reference list of all Smart Tasks available in the database

Smart Tasks are fully integrated with Sage E-marketing for ACT!* so you can send professionally designed emails

Easy to use drag-and-drop visual designer to create or customize multi-step Smart Tasks

Control of and visibility into the status of scheduled Smart Tasks for the current user

* Requires additional subscription.

Customer Feedback



- *“Smart Tasks--it's a WHOPPER of an idea! I can finally clear out activities from my task list that could be added on a needed basis and help me concentrate on what's most important.”*
- Beta Survey Respondent
- *“Eureka! This functionality [Smart Tasks] is a gem!!! - This step alone will save me hours of time in tracking and performing my updates to a certain group of contacts.”*
- Beta Survey Respondent
- *“Smart Tasks is the most important function; allows for real automation of tasks that save time.”*
- Beta Survey Respondent
- *“They [Smart Tasks] are intuitive and easy to use.”*
- Beta Survey Respondent

Outlook Contact and Calendar Sync



- Benefit:
 - Eliminate double entry with integration that allows you to have the best of both worlds. Integrate your Sage ACT! and Outlook contacts, plus keep your calendars in sync.
- Features:
 - Keep existing Sage ACT! contacts in sync with what's kept in Outlook
 - Contacts are updated in both places, no matter where changes are made
 - Control which contacts are synced back and forth
 - Keep your calendar updated in both places, including rules to automatically handle meeting conflicts
 - Choose which activity types in Sage ACT! sync back to Outlook

Outlook Contact Sync

Sage ACT! Premium

File Edit View Lookup Contacts Schedule Write Reports Tools Help

Sage ACT!

Back Forward New Call Meeting To-Do Note History Search E-mail Help Topics

Contacts

Detail View List View 1 of 201

Lookup

Contact Field: Contact

Contains: [] Go

More Options

Related Tasks

- View All Contacts
- Export to Excel
- Import Contacts
- Print Current Screen
- Change Columns
- Print Mailing Labels & Envelopes
- Write E-mail Using Template
- Mail Merge Contacts
- Sort List
- Create Group of Contacts
- Manage Smart Tasks

Company	Contact	Phone	Extension	Title	Address 1	Address 2	City	State
	William Cadbury	01214514444					Birmingham	
A1 Services	Andy Harrison	0174 287623		Sales Representati	67a Station Road		Blackpool	Lancashire
A1 Services of UK	Ann Goodall	0191 254590		Chief Designer	Unit 34	Holystone Ind Estab	Hebburn	Tyne & Wear
A1 Services of UK	Angela Ives	0174 287623		Music and Lighting	67a Station Road		Blackpool	Lancashire
A1 Services-US Op	Amanda Form	(212) 546-7890		VP of Sales	2131 W. Tiny Rd.		New York	NY
A1 Services-US Op	Pat Gourmet	(212) 546-7890		President US Oper	2131 W. Tiny Rd.		New York	NY
ABS Garages Ltd	Ania Dawson	0174 287623		President/CEO				
Ace Pet Store Franch	Jim Curtis	(423) 555-1221		Manager	925 Cabby St.	P.O. Box 123	Eugene	OR
Ace Pet Store Franch	Gavin Dillerstone	(423) 555-1221		Manager	925 Cabby St.	P.O. Box 123	Eugene	OR
Ace Pet Store Franch	Jackie Jorgensen	(423) 555-1221		Proprietor	925 Cabby St.	P.O. Box 123	Eugene	OR
Ace Pet Store Franch	Colleen McCarthy	(423) 555-1221		Owner/Operator	925 Cabby St.	P.O. Box 123	Eugene	OR
Ace Pet Store Franch	Sandy Ryan	(423) 555-1221		Buyer	925 Cabby St.	P.O. Box 123	Eugene	OR
ACTI User Commur								
American Dreams	Kristi Cameron	(480) 555-1245						
American Dreams	Hayleigh Frieda	(972) 555-8442						
AVB Enterprises	Suzie Lee	(623) 898-1022						
Beautiful Friendship	Rick Blaine	49133 1 46 93 28						
Beautiful Friendship	Ilsa Lund	49133 1 46 93 28						
Beautiful Friendship	Louis Renault	49133 1 46 93 28						
Best Lender Financ	Benny Lender	(847) 555-2221						
Bick's Longhorns	Jordan Benedict	432-730-5678						
Bick's Longhorns	Lesley Benedict	432-730-5678						
Black Forest Bakin	Kristi Elmendorf	012-555-54						
Bodega's Bodacious	Mitch Brenner	707-798-4253						
Bodega's Bodacious	Melanie Daniels	707-798-4253						
Boomers Artworx	Jane Bellamy	0198 167423						
Boomers Artworx	Richard Harvison	0191 268960						
Boomer's Artworx	Emily Dunn	(602) 555-4874						
Brande's Bakery	Bettie James							
Brande's Bakery	Liz Dittmeier	(208) 555-2445						
Brande's Bakery	Mackenzie Jensen	(208) 555-2211						
Brock, Lathers and	Dr. Deiter Brock	(879) 923-43						
Brushy's Golfing W	Paul Brushman	(455) 555-2221						
Burley Internet Cor	Joshua Burley							
Cadbury	William Cadbury	01214514444						
Captains of Industry	UR Powerful	(713) 661-5095						
CH Gourmet Coffee	Cecilia Carter	(212) 555-4444						

Contacts are kept up-to-date, regardless of where they were created or modified

Control which Sage ACT! contacts are synced to Outlook

Create new Outlook contacts from Sage ACT!

Edit Sage ACT! contacts from Outlook

Contacts - SageQA1@ACTTEST.local - Microsoft Outlook

File Home Send / Receive Folder View

New Folder Rename Folder Copy Folder Share Contacts Open Shared Folder Folder Permissions Properties

My Contacts

Suggested Contacts

Benedict, Jordan

Jordan Benedict
Bick's Longhorns
432) 730-5678 Work
jordan@bicklonghorn.email

Benedict, Lesley

Lesley Benedict
Bick's Longhorns
432) 730-5678 Work
lesley@bicklonghorn.email

Brenner, Mitch

Mitch Brenner
Bodega's Bodacious Birds
707) 798-4253 Work
mbrenner@davidsonspets.email

Brock, Deiter

Dr. Deiter Brock
Brock, Lathers and Freedman
Plastic Surgeon
879) 923-4309 Work
dbrock@cpqt.co.email

Carter, Cecilia

Cecilia Carter
CH Gourmet Coffee
Public Relations Manager
(212) 555-4444 Work
cecilia@chgourmetgifts.email

Daniels, Melanie

Melanie Daniels
Bodega's Bodacious Birds
President
(707) 798-4253 Work
mdaniels@davidsonspets.email

Harrison, Andy

Andy Harrison
A1 Services
Sales Representative

McCarthy, Colleen

Colleen McCarthy
Ace Pet Store Franchises
Owner/Operator

June 2010

Su Mo Tu We Th Fr Sa

30 31 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 1 2 3

4 5 6 7 8 9 10

No upcoming appointments.

Arrange By: Categories

Type a new task

There are no items to show in this view.

Outlook Calendar Sync

Calendars are kept up-to-date, regardless of where events were created or modified

Choose which system alarms will display in

Auto-sync schedules as frequently as needed

Select which Sage ACT! activity types sync to Outlook

The image shows two overlapping windows. The top window is Sage ACT! Premium, displaying a calendar view for June 14-18. The bottom window is Microsoft Outlook, displaying the same calendar data. A callout box in Outlook points to the 'Calendar' tab, indicating that users can choose which system alarms will display in Outlook.

Customer Feedback



- *“I love the Outlook enhanced syncing capabilities.”*
- Beta Survey Respondent
- *“Very nice to have Outlook contact sync!!”*
- Beta Survey Respondent
- *“Very stable—the Outlook interface works like a charm.”*
- Beta Survey Respondent
- *“Overall was pleased and liked the Outlook integration.”*
- Beta Survey Respondent
- *“I've tried many other brands of contact management and CRM programs and found myself saying ‘If I could only get it to do this, or that.’ Well ACT! does it.”*
- Beta Survey Respondent

Sage Business Info Services for ACT!



- Benefit:
 - Unlock a rich source of new leads with Sage Business Info Services for ACT!*, a cloud-based service that pulls highly targeted prospect lists from Hoover's™ and puts them into Sage ACT!.
- Features:
 - Tap into a database of 65 million companies and 85 million contacts to find new opportunities
 - Find new leads based on your targeted demographics
 - View business info about known key contacts and companies including profiles, financials, industry info, news, and more
 - Receive newsworthy email alerts from a company watch list
 - Free version includes basic company, financial, and industry info
 - Subscribe to receive more detailed company, contact, competitive, and lead info

** Requires additional subscription.*

Sage CRM Solutions

Sage Business Info Services for ACT!

Conduct a keyword search when looking for specific keywords, people, and companies*

Build a list in just a few steps using 40+ search criteria*

Sage Business Info Services for ACT!

Search

Companies People Build A List

enter text... Search

OR

Build A List *searching 17,364,886 companies* [Help using Build A List](#)

Show all criteria Hide all criteria START OVER Currency: \$ USD Set Default Currency Downloadable Only

COMPANY LOCATION (World Region, Country, US State/CAN Province, City, and more) [Help using company location search](#)

Global State/Province

e.g. Queensland or NY (single province/state only)

COMPANY LOCATION

COMPANY SIZE

INDUSTRY

COMPANY TYPE

PEOPLE

FINANCIAL DATA

SPECIALTY CRITERIA

World Region

ANY Africa Asia Caribbean Central America Europe

Country

ANY United States Canada Albania Algeria Andorra

US State/CAN Province

ANY Alabama Alaska Alberta Arizona Arkansas

US Metropolitan Area

ANY Abilene, TX Aguadilla-Isabela-San Sebastián, P Akron, OH Albany, GA Albany-Schenectady-Troy, NY

City

e.g. Madrid or New York (single city only)

US/CAN Area Code

e.g. 512 or 210, 512, 212

ZIP/Postal Code

e.g. 78701 or "SW1P 1JA" or "SW1" or US ZIP code range 78701-78752. Separate multiple ZIP codes by commas.

NEW! Area Around US ZIP Code

Find results within 10 miles of ZIP code 85258

e.g. Find results within a 50 miles of 78745 (up to a up maximum radius of 100 miles or 160 km). Use only one 5-digit ZIP code.

Location Criteria Matching

All Any

Matching ALL means a company would have to match each type of criteria entered. Matching ANY means that a company could match any single type of criteria entered.

MORE LOCATION CRITERIA (UK County)

Total Results: 17,364,886

Refine your search based on targeted demographics*

* Available on Reference + Leads plans only.

Sage Business Info Services for ACT!

The screenshot displays the Sage ACT! Premium interface. The top menu bar includes File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, and Help. Below the menu is a toolbar with icons for Back, Forward, New, Call, Meeting, To-Do, Note, History, Search, E-mail, and Help Topics. The main window is titled 'Sage ACT!' and shows a 'Contacts' list with 6 of 6 items. The selected contact is 'Chris Huffman', a Buyer at 'The Sage Group plc' in Newcastle, United Kingdom. The interface also shows a 'Business Card' section with fields for Contact, Company, Title, Department, Salutation, Phone, Mobile, E-mail, and Last Results. A 'Business Info' section for 'The Sage Group plc' is visible, including a description of the company, contact information, industry, company type, and year of funding.

Field	Value
Contact	Chris Huffman
Company	The Sage Group plc
Title	Buyer
Department	Facilities
Salutation	Chris
Phone	
Mobile	
E-mail	
Last Results	
Address 1	North Park
Address 2	
City	Newcastle
State/ZIP	NE13 9AA
Country	United Kingdom
Fax	
Personal E-mail	
Web Site	http://www.sage.com

Field	Value
Company Name	The Sage Group plc (wrong company?)
Description	The Sage Group is plenty seasoned when it comes to business software. The company, one of the world's largest providers of accounting and payroll software and services, was formed in 1981 and claims more than 6 million customers, primarily small and mid-sized clients. The Sage Group also offers software applications for billing, business intelligence, contact management, e-commerce, customer relationship management (CRM), financial planning, and human resources (HR) management. The Sage Group also provides a variety of services, such as consulting, maintenance, support, and training.
Contact Information	800-854-3415 North Park Newcastle, null. NE13 9AA http://www.sage.com
Industry	Accounting & Finance Software
Company Type	PUBLIC
Year of funding or change of control	1988

Import company info including the company's history and overview, products and operations, competitors, and key financial data*

View breaking news from a variety of sources that appear in a timeline format for easy viewing*

Receive a summary news report via email on the companies you're following *

* Some information may be only available on Reference and Reference + Leads plans only.

Sage Business Info Services for ACT!

The screenshot displays the Sage ACT! Premium interface. The top menu includes File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, and Help. The main window is titled 'Sage ACT!' and shows a 'Business Card' for 'Chris Huffman' at 'The Sage Group plc'. The contact details include address (North Park, Newcastle, NE13 9AA, United Kingdom), phone, mobile, and email. A callout box points to the contact details with the text: 'Import selected contacts and their info into your Sage ACT! database**'. Below the contact details, there is a list of contacts for 'The Sage Group plc (wrong company?)'. A callout box points to this list with the text: 'Target key decision makers within a company by viewing a listing of their names and titles*'. The list includes several contacts with checkboxes and hyperlinks to their profiles. A callout box points to one of the hyperlinks with the text: 'Click on contact names for more detail such as their biography and job history**'. The bottom of the interface shows a 'Lookup' section with 'All Contacts' and 'Histories: 3'.

Import selected contacts and their info into your Sage ACT! database**

Target key decision makers within a company by viewing a listing of their names and titles*

Click on contact names for more detail such as their biography and job history**

The Sage Group plc (wrong company?)	
<input checked="" type="checkbox"/>	CEO, UK and Ireland and Director Paul L. Stobart
<input checked="" type="checkbox"/>	VP and General Manager Sage Employer Solutions, Sage North America Clifton Laurent
<input checked="" type="checkbox"/>	CEO, South Africa and Australia Ivan Epstein
<input type="checkbox"/>	Director Ruth Markland
<input type="checkbox"/>	Group CTO Klaus-Michael Vogelberg
<input type="checkbox"/>	Manager Group Corporate PR Ralph Charlton
<input type="checkbox"/>	COO, Sage Software Healthcare Lindy Benton
<input checked="" type="checkbox"/>	Director Tim Ingram
<input checked="" type="checkbox"/>	Director Group Finance and Director Paul S. Harrison
<input checked="" type="checkbox"/>	Director Jan Mason
<input type="checkbox"/>	Director Tamara Ingram
<input type="checkbox"/>	Group Director Human Resources and Corporate Communications Karen Geary

* Some information may be only available on Reference and Reference + Leads plans only.

** Contact data is variable based on the data collected by Hoover's.

Compare Business Info and Leads Plans

		<i>Most popular!</i>	Reference	Free Business Directory
		Reference + Leads \$54.95 pupm	\$24.95 pupm	
Business Info				
Profile	Line of Business	✓	✓	✓
	Full Description	✓	✓	
Financials	Basic	✓	✓	✓
	Expanded	✓	✓	
Contacts	Import Key People	✓	✓	
Industry	Overview	✓	✓	
	Competitors – Top 3	✓	✓	✓
	Competitors – Full List	✓	✓	
News	News and Timeline	✓	✓	
Alerts	Email Alerts	✓	✓	
Leads				
	400 Leads per Month*	✓		
	Keyword Search	✓		
	Build a List	✓		

Need more?

*Additional leads sold in blocks of 400 for \$49.95/month.

Why Sage ACT! 2011?



Make contact. Build relationships. Get results.

- ✓ Automate key activities with Smart Tasks
- ✓ Eliminate double-entry with Sage ACT! and Outlook® sync
- ✓ Unlock a rich source of new leads with Sage Business Info Services for ACT!—powered by Hoover's™

Sage CRM Solutions

Product Comparisons



Feature	Sage ACT! Pro	Sage ACT! Premium
Number of Users	1-10	1-10+
Contact and Customer Manager Functionality	✓	✓
Windows® and Mobile Access	✓	✓
Web Access		✓
Standard Security Settings	✓	✓
Enhanced Security Settings		✓
Group Scheduling Functionality		✓
Dashboards and Reporting with Team Views		✓
Advanced Administration and Sync Options		✓

Version Comparisons

Feature	ACT! by Sage 2005	ACT! by Sage 2006	ACT! by Sage 2007	ACT! by Sage 2008	ACT! by Sage 2009	ACT! by Sage 2010	Sage ACT! 2011
Multi-select Values and Customizable Drop-downs	✓	✓	✓	✓	✓	✓	✓
Rich Text Formatting	✓	✓	✓	✓	✓	✓	✓
Attach Documents to Activities, Notes, and History	✓	✓	✓	✓	✓	✓	✓
Groups with Dynamic Group Membership	✓	✓	✓	✓	✓	✓	✓
Company Records with Contacts Linked to Companies	✓	✓	✓	✓	✓	✓	✓
Five Calendar Views, including Daily, Weekly, and Monthly	✓	✓	✓	✓	✓	✓	✓
Sales Opportunity Features, including the Opportunity List View, Instant Quotes, Sample Sales Processes, and a Graphical Sales Pipeline	✓	✓	✓	✓	✓	✓	✓
Preformatted Reports	✓	✓	✓	✓	✓	✓	✓
Export to Excel*	✓	✓	✓	✓	✓	✓	✓
Query-based Sync	✓	✓	✓	✓	✓	✓	✓
Customizable Opportunity Field Names and Types		✓	✓	✓	✓	✓	✓
Citrix* and Terminal Services		✓	✓	✓	✓	✓	✓
Automatic Database Backup and Sync		✓	✓	✓	✓	✓	✓
Last Email Field			✓	✓	✓	✓	✓
Specify Linked Contact and Company Fields			✓	✓	✓	✓	✓
Security Features, including Field-level Security and the Ability to Secure Notes, History, and Opportunities en Masse			✓	✓	✓	✓	✓

Feature	ACT! by Sage 2005	ACT! by Sage 2006	ACT! by Sage 2007	ACT! by Sage 2008	ACT! by Sage 2009	ACT! by Sage 2010	Sage ACT! 2011
Graphical Activity, Opportunity, and Admin Dashboards				✓	✓	✓	✓
Duplicate Checking by First and Last Names				✓	✓	✓	✓
Group and Company Features, including Duplicate Checking and Advanced Queries				✓	✓	✓	✓
Related Contacts					✓	✓	✓
Microsoft® Outlook® Email					✓	✓	✓
Integration					✓	✓	✓
Outlook Rules					✓	✓	✓
Social Media Integration						✓	✓
Sage E-marketing for ACT!¹						✓	✓
ACT! Mobile Live³						✓	✓
Reports View						✓	✓
Simplified Navigation						✓	✓
Welcome Page						✓	✓
Customizable Opportunities						✓	✓
Smart Tasks							✓
Professionally Designed Email Marketing Templates² that Complement Smart Tasks							✓
Sage Business Info Services for ACT!³							✓
Sage ACT! and Outlook Contact Calendar Sync							✓
Sage ACT! and Outlook Contact and Calendar Sync in Sage ACT! Premium (access via web)							✓
Direct Import from Excel							✓
Re-designed Welcome Page with Featured Videos							✓

1 Requires additional subscription.

2 Requires subscription to Sage E-marketing for ACT!.

[Click here](#) to learn more and
get started with Sage ACT! 2011

