



### 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<sup>TM</sup>

### **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.

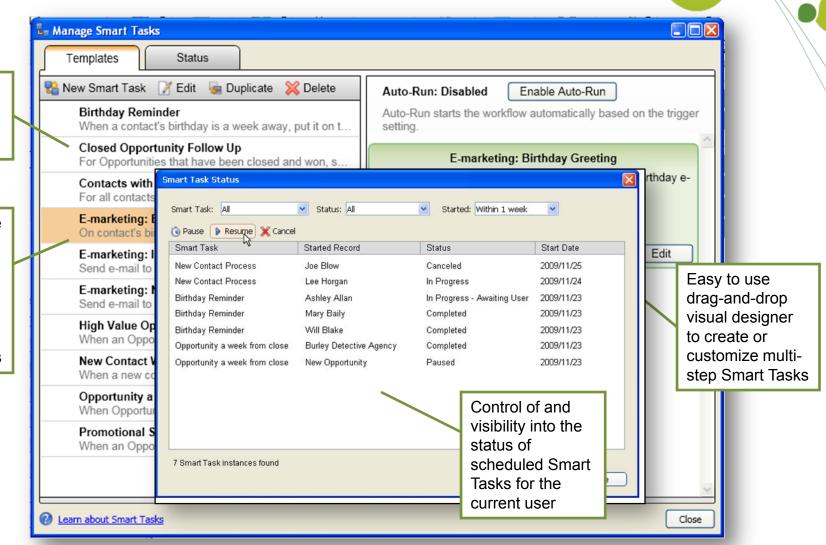
#### Features:

- 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

### **Smart Tasks**

Quick reference list of all Smart Tasks available in the database

Smart Tasks are fully integrated with Sage Emarketing for ACT!\* so you can send professionally designed emails



<sup>\*</sup> 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.

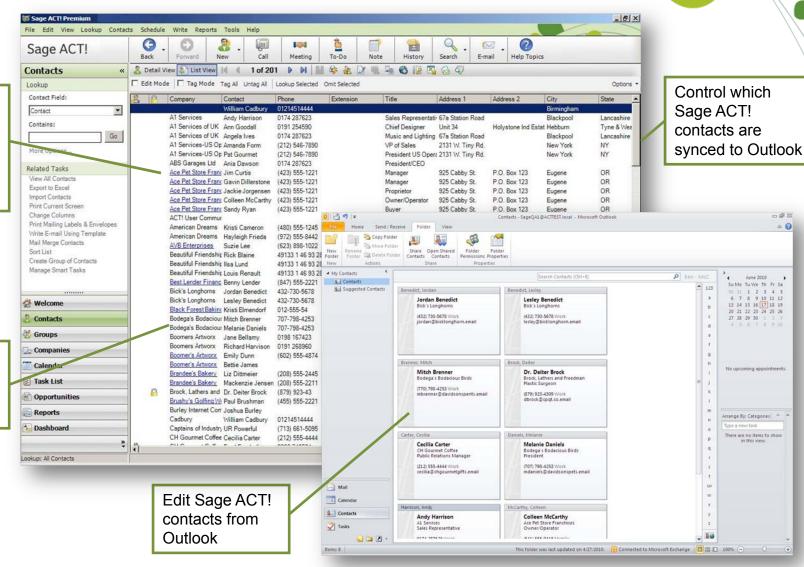
#### Features:

- 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**

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

Create new Outlook contacts from Sage ACT!



Sage CRM Solutions

### Outlook Calendar Sync

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

File Edit View Lookup Contacts Schedule Write Reports Tools Help 120 Sage ACT! Call Meeting To-Do Note History E-mail Help Topics Calendar Today Today Work Week Weekly Monthly June 14 - June 18 Types: All Select Users Contact Field: June 2010 SMTWTF Contact Choose which 30 31 1 2 3 4 5 6 am Contains: 6 7 8 9 10 11 12 2 13 14 15 16 17 18 19 system alarms Go 7 30 26 20 21 22 23 24 25 26 27 28 29 30 More Option will display in Breakfast Meeting Breakfast Meeting Breakfast Meeting 8:00 AM Related Tasks Breakfast Meeting 9 00 Check Availability 12:30 PM Client Meeting Print Calendar View Follow-up on Presentation Grant Calendar Access 10 30 Critical Issues Schedule Activity Series Modify Types of Activities 11 00 Print Calendar Using Template 1 Lunch Meeting 12 pm 00 Modify Preferences and Settings Address Book Opportunity Follow-June 2010 3 00 ↓ June 14 - 18, 2010 Su Mo Tu We Th Fr Sa 30 31 1 2 3 4 5 6 7 8 9 10 11 12 Welcome 13 14 15 16 17 18 19 Contacts 5 30 **Groups** 6 00 Companies 9 00 7 30 Calendar 1000 Critical Issues Meeting 8 30 Task List Opportunities 9 00 11 00 Reports Lunch Meetin 12 pm 10 00 Follow-Up Presentation Dashboard 00 Cold Call 200 12 Activities - 1 Call, 11 Meetings, 0 To-do's, 0 Custom Activities 4 00 Select which Show tasks on: Due Date

**Tasks** 

S = 2

Auto-sync schedules as frequently as needed

> Select which Sage ACT! activity types sync to Outlook

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All folders are up to date. 

Connected to Microsoft Exchange 

108 = 100% - 

+

### 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 Sage CRM Solutions

<sup>\*</sup> Requires additional subscription.

## Sage Business Info Services for ACT!

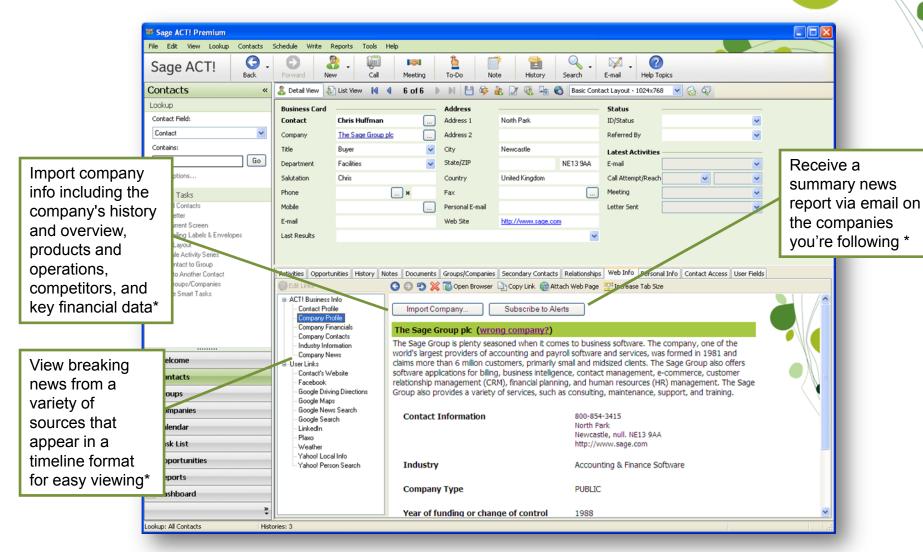
Conduct a keyword search when looking for specific keywords, people, and companies\*

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



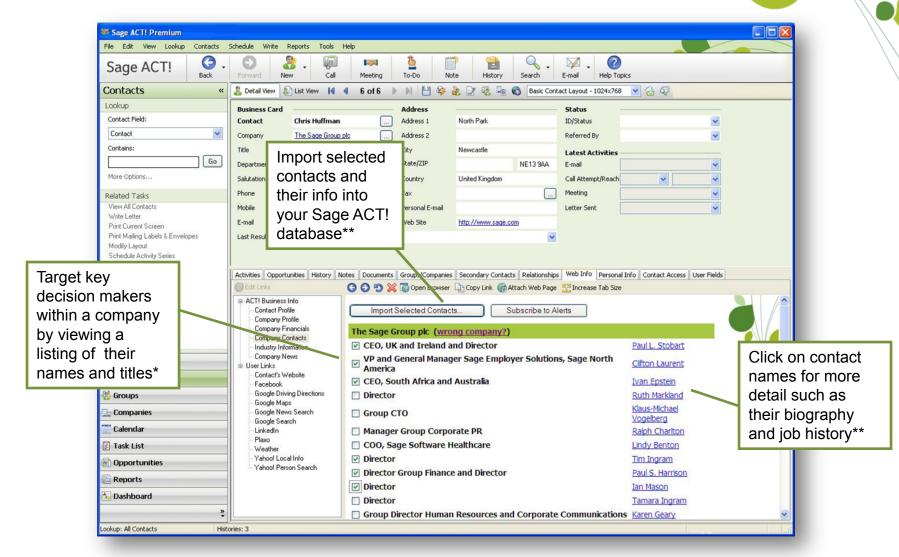
<sup>\*</sup> Available on Reference + Leads plans only.

# Sage Business Info Services for ACT!



<sup>\*</sup> Some information may be only available on Reference and Reference + Leads plans only.

# Sage Business Info Services for ACT!



<sup>\*</sup> Some information may be only available on Reference and Reference + Leads plans only.

<sup>\*\*</sup> Contact data is variable based on the data collected by Hoover's.

Compare Business Info and

**Leads Plans** 

Most	no	nul	arl
MOSt	$\mu \nu$	рuі	aı:

			Reference + Leads \$54.95 pupm	Refer <del>ence</del> \$24.95 pupm	Directory
<b>Business</b>					
	Profile	Line of Business	✓	<b>√</b>	√
		Full Description	✓	✓	
	Financials	Basic	✓	<b>√</b>	√
		Expanded	✓	✓	
	Contacts	Import Key People	√	<b>√</b>	
	Industry	Overview	✓	✓	
		Competitors – Top 3	✓	✓	✓
		Competitors – Full List	✓	✓	
	News	News and Timeline	√	√	
	Alerts	Email Alerts	<b>√</b>	√	
Leads					
		400 Leads per Month*	<b>√</b>		
		Keyword Search	✓		
		Build a List	✓		
	Need more? *Additional leads	sold in blocks of 400 for \$49.95/n	nonth.		CDAAC

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## **Product Comparisons**





Feature	Sage ACTI Pro	Sage ACTI Premium
Number of Users	1–10	1–10+
Contact and Customer Manager Functionality	/	✓
Windows® and Mobile Access	/	1
Web Access		1
Standard Security Settings	/	1
Enhanced Security Settings		1
Group Scheduling Functionality		/
Dashboards and Reporting with Team Views		1
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	1	1	1	1	1	1	1
RIch Text Formatting	1	1	1	1	1	1	1
Attach Documents to Activities, Notes, and History	1	1	1	1	1	1	1
Groups with Dynamic Group Membership	1	1	1	1	1	1	1
Company Records with Contacts Linked to Companies	1	1	1	1	1	1	1
Five Calendar Views, including Daily, Weekly, and Monthly	1	1	1	1	1	1	1
Sales Opportunity Features, including the Opportunity List View, Instant Quotes, Sample Sales Processes, and a Graphical Sales Pipeline	1	1	1	1	1	1	/
Preformatted Reports	/	1	1	1	1	1	/
Export to Excel®	1	1	1	1	1	1	/
Query-based Sync	1	1	1	1	1	1	1
Customizable Opportunity Field Names and Types		1	1	1	1	1	1
Citrix® and Terminal Services		1	1	1	1	1	1
Automatic Database Backup and Sync		1	1	1	1	1	/
Last Email Field			1	1	1	1	1
Specify Linked Contact and Company Fields			1	1	1	1	1
Security Features, including Field-level Security and the Ability to Secure Notes, History, and Opportunities en Masse			1	1	1	1	1

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				1	1	1	/
Duplicate Checking by First and Last Names				/	1	1	/
Group and Company Features, including Duplicate Checking and Advanced Queries				1	1	1	/
Related Contacts					/	1	/
Microsoft® Outlook® Email					/	/	/
Integration					/	1	1
Outlook Rules					/	1	/
Social Media Integration						1	/
Sage E-marketing for ACT!						1	/
ACT! Mobile Live¹						/	/
Reports View						1	1
Simplified Navigation						/	✓
Welcome Page						1	✓
Customizable Opportunities						1	<b>✓</b>
Smart Tasks							✓
Professionally Designed Email Marketing Templates <sup>2</sup> that Complement Smart Tasks							/
Sage Business Info Services for ACT!1							<b>✓</b>
Sage ACT! and Outlook Contact Calendar Sync							/
Sage ACT! and Outlook Contact and Calendar Sync in Sage ACT! Premium (access via web)							1
Direct Import from Excel							1
Re-designed Welcome Page with Featured Videos							/

<sup>1</sup> Requires additional subscription.

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<sup>2</sup> Requires subscription to Sage E-marketing for ACT!.

# Click here to learn more and get started with Sage ACT! 2011

