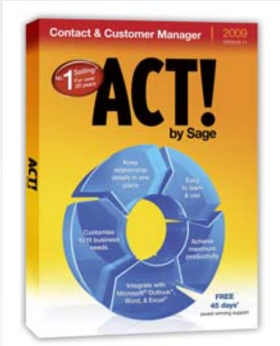
# Contact Management with ACT! 2009

## Organise your time, your contacts and your team within a single program




### Centralise Customer Information

ACT! is a single, central repository for all of your critical contact and customer information. ACT! 2009 works for up to 10 users in a network environment, and enables you to access detailed contact and customer information, manage calendars and activities, capture all customer communications, track opportunities throughout the sales process, and report on overall effectiveness.

### Stay on Top of Your Day

ACT! helps you manage your daily responsibilities – whether it's a task you must complete, a call with a customer or a meeting with a prospect. Everything you do in ACT! is related to a contact record so you can track all your (and your team's) interactions with that contact for a complete view of your corporate relationship.

### Organise your Contacts, Companies and Activities

You can also organise your contacts into Groups or collect together contacts into a Company Record. Track virtually unlimited Notes and History, including calls, meetings and to-dos on A contact record and view a roll-up for all contacts on the Group or Company Record. Calendar pop-ups make it easy to view activity details instantly and alarms will help you stay on top your tasks — which roll over to the next day so nothing slips through the cracks!

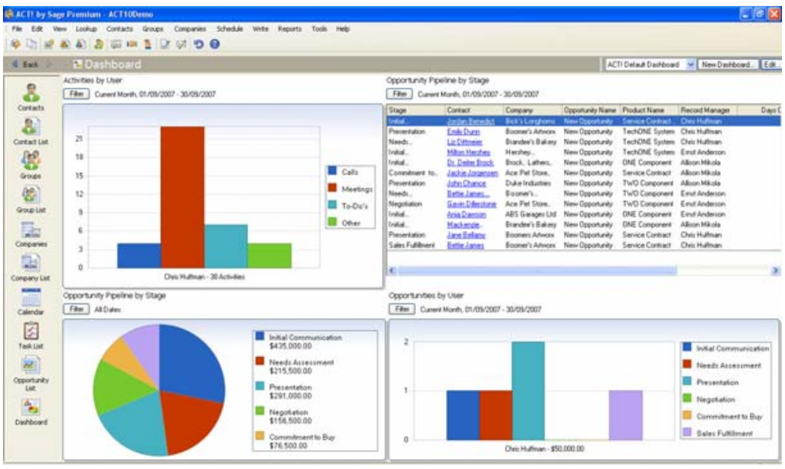
### Work as a team

Share your database across the company network and the entire team sees the same view of the business. Ensure that everyone has the same contact and company information such as the latest quotes, correspondence, meetings and phone call notes.

### #1 Selling Contact and Customer Manager for 20 Years...

ACT! by Sage is the #1 selling contact and customer manager for professional sales teams that need to improve individual and team productivity and results. With 20 years as the market leader and 41,000 corporate customers, ACT! is renowned for being easy to implement, learn, and use.

Sales professionals and managers can centralise contact and customer data, track sales opportunities, manage daily responsibilities, and effectively communicate with customers and prospects. Although easily personalised by individual sales team members, sales managers can easily access a complete roll-up of all team activities and opportunities. Flexible deployment options enable sales staff to work where they want, ease installation, and reduce total cost of ownership.



*The ACT dashboard gives a real-time graphical summary of your schedule, sales pipe-line and top opportunities*



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## Which ACT! version is right for you and your team?

**ACT! 2009** is a comprehensive, robust contact and customer manager ideal for individuals and small teams of up to 10 networked users. ACT data can be synchronised to remote users, PDA's and mobile phones for when you are on the move.  while ACT! 2009 Premium offers a host of functionality specifically designed to meet the needs of larger teams of networked users.

**ACT! 2009 Premium** offers all of the above plus a host of functionality specifically designed for the needs or larger teams and organisations, including group scheduling and automatic Outlook calendar synchronisation, advanced opportunity tracking and customisation capabilities, and robust reporting options to provide insight into team performance – all improving overall team satisfaction and productivity.

**ACT! 2009 Premium for Web** allows remote users to access the ACT! Premium database across the internet and without having to have ACT! installed on their PC.

"Software is only as good as the people who know and support it. TLC makes ACT one of the best around."
Rob Hook
Consultrix

### Improve Sales Predictability and Results

Forecast and track sales opportunities for better insight into your pipeline. With ACT!, you can track sales opportunities from initial inquiry right through every stage to the close. Use the defaults sales process or design your own to match the way you work. To view a consolidation of sales opportunities, use the ACT! Dashboard and quickly gauge your pipeline, top 10 opportunities, and more, while managers can use the Dashboard to see how team members are performing against their sales and activity targets.

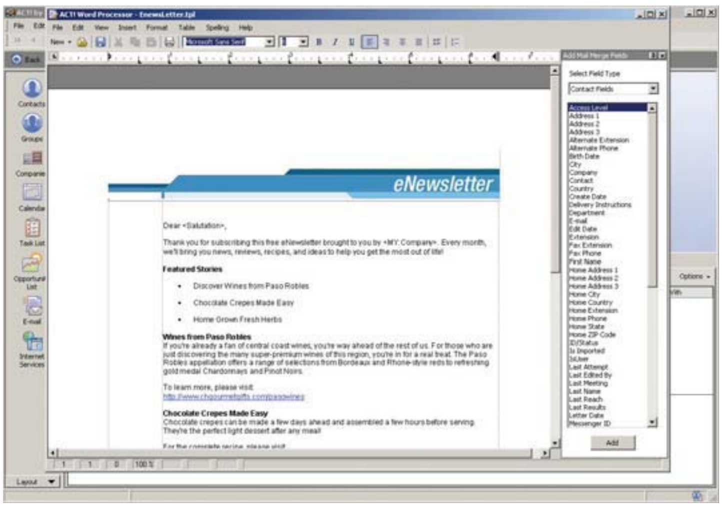
### Report on Performance

Using ACT!, sales people can easily report their status and results to management with just a few clicks. Running reports in ACT! is very straightforward using one of more than 40 standard reports, with 20 focused on sales activities. Or, management can create custom reports that better align to the business using the Report Designer. And, most reports can be displayed in Excel, in HTML or PDF format, or e-mailed right from ACT!.

### Increase Efficiency with Interactive Dashboards

The ACT! Dashboard provides individual users and managers with a performance snapshot of business-critical information in a single view. It offers a comprehensive, graphical representation of key information in a highly interactive format, so users have the information they need to best tackle their day and be more efficient. Managers can quickly gauge the performance status of all team members to more effectively set individual user and team targets.

Using the Dashboard, users can easily evaluate their day and identify which tasks need to be completed and in what order. Then they can drill down for more detail or to take further action. Managers get the visibility they need to better manage their team without the administrative burden of producing and reviewing




*Perform mail merges and track a history of the communication on each contact record*

# The ACT! Contact Screen: Summary of key capabilities

1. **Reports:** Gain critical insight into your business using up to 40 standard reports - or create your own with the built-in report editor.

2. **Lookups:** Instantly access any important contact or detail with fast look-up capabilities.

3. **Companies:** Associate contacts with a company record and view a consolidation of all notes, histories, documents, emails and sales opportunities.

4. **Groups:** Track collections of related contacts using the Groups feature to assess projects, marketing campaigns, customer product interest etc

5. **Calendar:** Get daily and work week views with pop-up details on each event as you “mouse” over them. View colleagues calendars and schedules to check for free and busy periods.

6. **Task List:** Sort by priority to stay on top of important tasks such as phone calls, to-do’s and meetings etc.

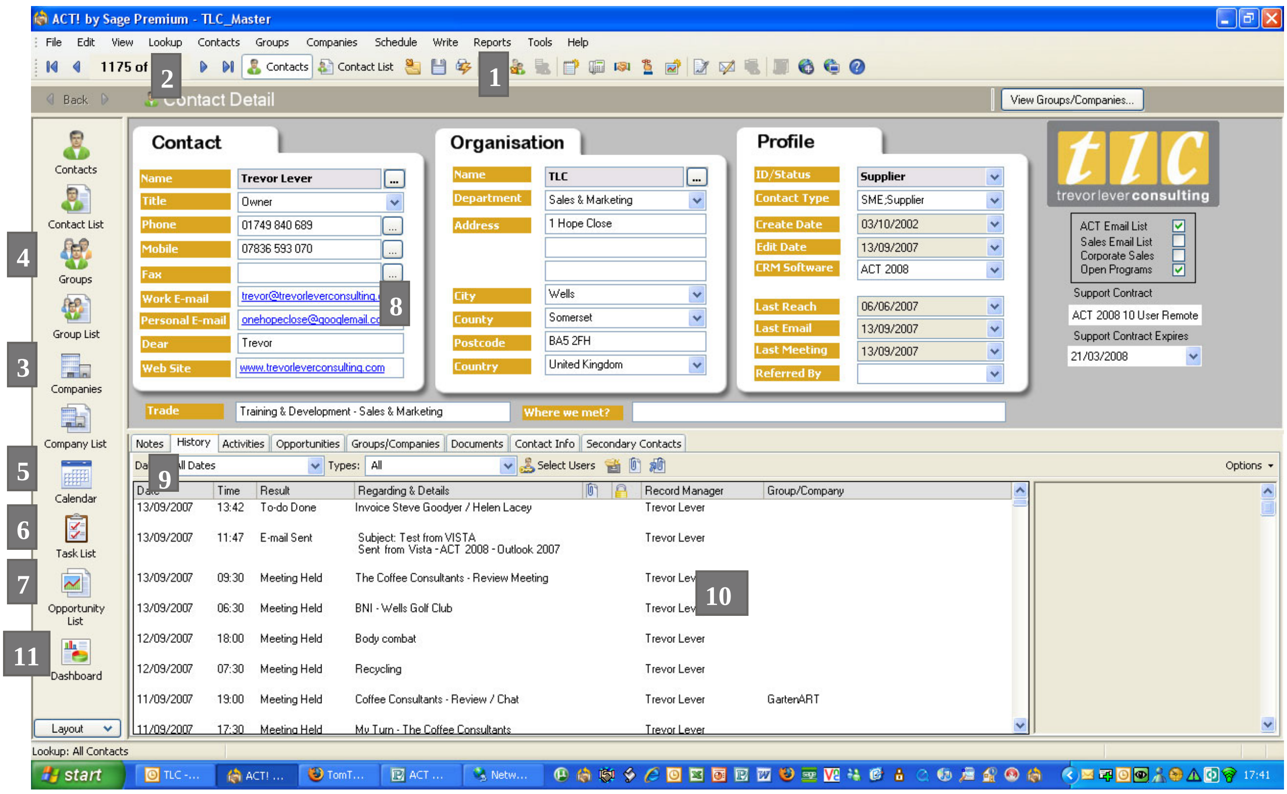
7. **Opportunity List:** View all of your sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount or Probability of Close. Export to Excel for Pivot Table analysis.

8. **E-mail:** Communicate to your customers by e-mail and track a history on each contact Record of the emails you have sent them and those that you have received. Use ACT’s built-in e-mail or integrate with Outlook or Lotus Notes.

9. **Notes and History Tabs:** View date- , user- and time-stamped Notes and History.

10. **Rich-text formatting:** Use Rich Text formatting, including changing colours and fonts, in Notes, History, Activity, and Opportunity details.

11. **Dashboard:** create graphical overviews of key activities and sales opportunities for you and your team



**Easy to Implement, Learn, and Use**

Unlike many contact and customer management or CRM solutions, ACT! is easy to learn and use because it's designed to work like salespeople work and uses the language that they do. ACT! provides complete contact, sales and account information on single screens — minimising clicking and searching for key information. With the intuitive layouts and workflows in ACT!, team members can be productive in little or no time, managers benefit from high levels of adoption, and support staff experience minimal requests.

**Centralise and Secure Contact Data**

ACT! provides a single, central repository for critical contact information captured throughout your organization, which reduces duplication and errors, enables improved data control and security, and eases data maintenance tasks. ACT! enables sales teams to access contact details, relationship history, and opportunity information so they can have meaningful communications with prospects and customers. It also allows managers to spend more time helping and coaching their teams and less time requesting reports, account summaries and forecasts from the sales staff.

With ACT!, you can set controls, including forced drop-downs, multi-select fields, mandatory fields, so the contact information entered is consistent and complete. As a result, the organisation will have detailed prospect and customer data and sales management will have the accurate reports they require. And with ACT! you can count on keeping information when a sales rep leaves, as you can enable or disable your team from deleting and/or exporting information to Excel®.

**Streamline Daily Functions for Increased Sales Productivity**

ACT! delivers a complete solution that streamlines daily functions so your team can focus on selling, not administrative tasks. ACT! provides functionality that allows your sales reps to quickly access information, stay on top of key commitments using the Task List and Activity Alarms, manage groups of related contacts for easier tracking and marketing, and communicate more effectively using Mail Merge and preformatted templates. By streamlining required functions throughout the day, your reps will stay productive and focus on the critical task of selling.

"TLC implemented a solution for our multiple location sales data base, quickly and efficiently and it has ticked over happily and effectively ever since."
Marsha Parker
eFlow Global

# ACT! 2009: Key Capabilities

### Organize contacts and leads

- Track contact details, notes and history, appointments and to-do items, documents, and opportunities.
- Populate 60+ pre-defined fields including Name, Company, Phone, Address, Web site, E-mail, and ID/Status, or add your own.
- Attach documents directly into Activities, History, or Documents tabs. Even when you are in Microsoft® Word and Excel, you can attach documents and spreadsheets to ACT! contacts so it's easy to quickly locate presentations, proposals, quotes, etc.
- Create Company Records and view a roll-up of notes, history, and opportunities tied to contacts at those companies.
- Use Groups with 15 levels of hierarchy (14 Subgroups) to easily organize, communicate, and schedule related contacts.

### Manage daily responsibilities

- Schedule calls, meetings, and to-dos quickly and easily, and filter each by priority, date range, or user. Access each with five Calendar views including Daily, Weekly, and Monthly, or from the Task List.
- Use Activity Alarms to stay on top of deliverables. Incomplete activities roll over to the next day.
- Synchronize your ACT! and Outlook calendars to facilitate appointment scheduling with company employees not using ACT!.
- Utilize ACT! Dashboard components Schedule At-A-Glance and My Activities to get a fast, accurate snapshot of key calls, meetings, and to-dos.

### Track sales opportunities

- Use the built-in ACT! sales process or customize the sales process to suit your specific needs.
- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.
- Use the Product List to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price. View the graphical Sales Pipeline and drill down to see opportunity details.
- Choose from 20+ preformatted Sales Reports or export to Excel with one click for further analysis using built-in, customizable pivot tables.
- Utilize ACT! Dashboard components Opportunity Pipeline by Stage, My Opportunities, Top 10 Opportunities, and Closed Sales to Date for a graphical snapshot of how you're tracking toward metrics.

### Communicate more effectively

- Create, send, and track e-mail to/from contacts using the ACT! E-mail Client integrated with Outlook Express or Lotus Notes®, or integrate ACT! directly with Outlook4.
- Track customer correspondence for a history of all communications with a contact and its organization.
- Quickly identify your last communication with a contact using the Last Communication fields, including Last Reach, Last Attempt, Last Meeting, Last Letter, and Last E-mail fields.
- Write letters in ACT! using Word or the ACT! built-in Word Processor, which supports tables, graphics, HTML, and spell checking. And, use preformatted templates for e-mails, letters, and memos, and easily customize the HTML graphical templates to e-mail customers.
- Select a contact or a group of contacts and perform a Mail Merge to a letter or e-mail.

### Gain business insight

- Perform a look-up on most fields or use Keyword Search and ACT! will highlight the keyword in a particular note, history, activity, or opportunity. Or, perform numeric look-ups such as greater than or less than queries.
- Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries. Or, use the Report Designer to create custom reports and send most reports to Excel, HTML, PDF, or e-mail.
- Get a pulse on your business in a single view with comprehensive, graphical representations of key information with the ACT! Dashboard.
- Tailor ACT! to suit your business by customizing Priority, Activity, and History types, allowing for better tracking and analysis.
- Customize layouts, including changing colours, adding logos, and moving relevant field displays for greater visibility.

### Access while mobile or remote

- Synchronize your ACT! Calendar, Contact and To-Do information, Notes, and History items to Palm OS®, Pocket PC, Windows® Mobile 6.1, or BlackBerry®5 devices.
- Print more than 20 templates designed for popular paper organizers so you always have your schedule with you.
- Print from any ACT! calendar template and the contact phone number for any scheduled call is automatically printed on the calendar.
- Access critical contact and customer details through Citrix® or Terminal Services6 when out of the office.



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### Use “out of the box” or Customise to Suit Your Team

ACT! can be used as-is or highly customised to fit your business requirements, while still allowing for the accurate reporting you need to manage your team. Individuals can filter data in the Dashboard view while teams can add fields and tabs as needed. Customise the screen layouts by changing colours or adding your logo, or by adding custom priority, activity, and history types. The individuals’ ability to personalize ACT! and the customization capability at the organizational level drive user adoption, provide consistent information and reports needed by management, and reduce administrative burden on IT.

### Integrate with Existing Applications

ACT! improves sales team productivity by integrating with existing applications such as Microsoft Outlook e-mail and calendar, Word, and Excel, plus accounting solutions, allowing individuals to work the way they want within applications they already know. In addition, this enables your organization to leverage existing technology investments and keep everyone productive.

**Important Note for all customers:** Sage Software recommends you carefully review all ACT! system requirements and compatibility criteria at www.trevorleverconsulting.com to ensure your system meets these requirements.

**Compatibility with ACT! Solutions:** ACT! 2009 cannot be used in conjunction with ACT! Premium 2009 or ACT! Premium for Web 2009. When used in standalone environments, ACT! Premium and ACT! Premium for Web solutions are only compatible with their respective same editions. When used in conjunction with each other, ACT! Premium and ACT! Premium for Web editions must be the same.

**Regarding ACT! for Palm OS®:** ACT! 2009 solutions are not compatible with ACT! for Palm OS® 2.0.

**Regarding ACT! Link for use with QuickBooks:** ACT! Link for use with QuickBooks 3.x is not compatible with Windows® Vista™.

"TLC provided a completely integrated and professional service for both ACT Software and our Sales Training. The outcome is a customer support system that works from sales call through to invoice."
David Dearden
Pilz (UK) Ltd

## About Trevor Lever Consulting (TLC)

**Key to success in any business is the ability to generate sales. With no sales, there is no business.**

From the moment an enquiry is received, through to closing the sale, there are many pitfalls and potential problems which, if not addressed correctly, can result in the business being lost.

TLC can help you improve your sales effectiveness in three complimentary ways:

- Contact Management (ACT)
- Business Development
- Sales Training & Personal Development

With over 30 years sales experience gained in both multi-nationals and from being an owner manager of an SME — Trevor Lever Consulting is uniquely placed to help you increase your own sales effectiveness.

**Contact TLC today for an informal discussion about how ACT! 2009 can help your personal sales effectiveness, or that of your organisation**

"As a young company we needed a database that would work for us but not cost the earth.
TLC listened carefully to our needs and offered an appropriate and highly beneficial database solution."
Ruth Moody
Farscape Developments

Trevor Lever Consulting (TLC)
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Somerset
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