What's new if I upgrade to ACT! 2012?

Each year Sage release a new version of ACT! With each release there are many bug-fixes, enhancements and additional capabilities. This document provides a summary of the key features added to each release of ACT. So that if you upgrade from an earlier version of ACT, you can quickly see, what additional capabilities you would gain.

New Features in ACT 2012 (V14.0)

Improved Connectivity

You can now have the synchronisation to remote databases and have the accounting link enabled between ACT and Sage Line 50 accounts.

Sage ACT! Scratchpad

Quickly capture impromptu notes, phone numbers and reminders. Check off them off once completed, print the list to take with you and push important items into ACT for further follow-up.

Google Integration

Integrate with Gmail, Google Calendar and Google Contacts. No need to check two different places (or email systems) to find out a complete view of everything. All of your contacts (or a subset) can be updated and synchronised to ACT.

Universal Search

Find information faster and better with the new Universal Search. Enter text into the Universal Search Box (which is always top right on every page) and find that text in throughout ACT: even in attachments and document names.

Sage ACT Connect

Get access to key data when you are out of the Office (subscription required) on your Smart Phone, IPad or laptop (on supported browsers)

ACT for Web

For ACT Premium users you now have Internet Explorer 9 compatibility and you can add / remove / update access for users from the ACT for Web over the internet.

Improved Importing

There is a confirmation message after importing from Excel and other Sage ACT! databases

Improved Accounting Link

The accounting link has been improved and is now much faster – especially for large Sage databases. This link is backwards compatible with ACT 2011

New features in ACT! 2011 (V13.0)

Improved Installation

There is now an option to ***not*** install SQL on the client machine when working in a network environment. Besides taking up less room on the hard drive, the user is prevented from creating a database, saving a copy of the database as well as synchronisation from that machine.

Improved New-User Experience

There are several new video's to help new users get up to speed on the capabilities of ACT. These can be found under the help menu as well as on the Welcome page.

Excel Import

You can now import directly from an Excel file into ACT rather than going via a .csv or .txt file. You can also create new fields during the import process based upon the contents of the spreadsheet.

Outlook Synchronisation

Contacts (or specific groups of contacts) can be synchronised from ACT to Outlook. Once sync's, make a change in either and it is updated automatically by the other. The calendar synchronisation has also been improved so that you can select which activity types (say, just Meetings) are synchronised with your Outlook calendar. The synchronisation takes place if either ACT or Outlook is closed.

Smart Tasks

A new capability that automates your workflow within ACT. You create a Smart Task when you need to automate a process such as sending out a "Thank You" email when an Opportunity is closed and won. You can have Smart Tasks add activities to your schedule – such as following up your "A" contacts that haven't been called for 90 days. So have the routine automated in ACT whilst you focus on what is urgent. 10 predefined Smart Tasks are included for common situations, to help you get started.

Office 2010 Support

ACT 2011 is fully compatible with Outlook 2010, Word 2010 and Excel 2010. (Office 2002 and earlier are not supported)

Back / Forward Buttons

Lost in ACT 2010 but now back – and improved – in ACT 2011. The Back button now has a drop down list associated with it so that you can go back to any of your previous 10 views of the database, not just the last one.

Opportunity View

The product field can now be added to the List View for Opportunities and is also included in any "Export to Excel" command.

Email Security

At long last, it is now possible to "Not record email history between users" within the ACT database

New features in ACT! 2010 (V12.0)

Improved Installation

Installation is reduced to a simple 3 step procedure: Regional Settings, End User Agreement and Typical / Custom Install.

New Welcome Home Page

Displays options relative to the users Security Level. This page provides an aggregation of help, wizards, tutorials and how-to information in a single place.

New User Interface

New “clutter free” toolbar (Big Buttons) for the most commonly used actions. A new navigation panel that can collapse to increase deskspace for large layouts. Inside the Navigation Panel are a new Lookup section, a context sensitive Related Tasks section and finally a customisable stacked toolbar.

Web Info Tab

This is effectively a built in web browser that can be customised to “pass” specific field information to a website. This enables creation of site searches of any social media website for specific contact / company information.

Expanded Opportunities

In previous versions of ACT! an Opportunity was created from the context of a contact record. With ACT! 2010 an Opportunity has equivalent status as a Contact, Company or Group. Opportunities may be associated with all, some or no contacts, companies and groups. This means that you can perform lookups, attach notes, history and documents directly to an opportunity. The layout of the Opportunity screen is fully customisable; you can add new fields, tabs etc. as well as set security options.

New Reports View

All reports are consolidated into a single view and favourite reports easily differentiated in a two-panel view from all others. Additional reports are available for the new Opportunity entity.

Enhanced Dashboards

A new “data chart” custom component is available and two new pre-configured dashboards are available: the Contacts dashboard and the Administrator dashboard.

iCalendar support

Meetings and Tasks can now be integrated with other 3rd party calendar software (Outlook, Google Calendar. Applie iCal etc.) When creating a meeting a new tick box is displayed “Send Invitation email”. If selected, an ICalendar request is created and attached to an email message.

Document Preview

If Office 2007 is installed then documents linked or to the Documents Tab may be previewed (PDF and Word) without the need to open the native application.

Remote Database Creation

Upto 50 remote databases may be created at the same time with the settings for each (sync set, supplemental and attachment sync) set individually.

E-Mail Marketing

Swiftpage E-Mail Marketing is now integrated into ACT! 2010. Creation and use of a Swiftpage account is required and is an additional charge.

New features in ACT! 2009 (V11.0)

E-mail Communication

Keeping Microsoft Outlook e-mail communications in ACT! is easy using integration improvements to record history and attach messages.

Record e-mail history quickly and easily

From each Outlook e-mail message, you can select the ACT! history option you want to record to your ACT! contacts. You can base the history on the significance of each e-mail you send. If you use multiple databases, you can easily change the database you want to record all your Outlook e-mail messages to.

Attach multiple e-mail messages

Select multiple Outlook e-mail messages and quickly attach them to contacts.

Create ACT! activities from Outlook e-mail messages

Easily create an activity from an Outlook e-mail message that requires an action, such as a follow-up meeting.

Use Outlook rules with ACT!

You can combine Outlook rules with a custom action to record e-mail messages in ACT!. For example, you can create a history for any e-mail sent by a specific ACT! contact.

Configure e-mail using the Setup Assistant

Easily set up e-mail systems for new users that you add to your team. The new Setup Assistant walks you through the steps to properly configure e-mail whether you use the ACT! e-mail client, Microsoft Outlook, or other e-mail systems supported in ACT!. **Note:** The Setup Assistant is not available in ACT! Premium for Web.

Send e-mail from the Notes preview pane

Conveniently send e-mail from the Notes preview pane. When you click the e-mail address hyperlink, your e-mail window opens and populates the "To" field with the e-mail address.

Search Capability

Quickly find data in ACT! using redesigned Lookups.

Easily find data with improved and powerful lookups

Using simplified and enhanced lookups, you can search on partial names or titles; switch between searching for Contact, Group, and Company data without starting a new lookup; or further define the last lookup you performed without exiting your current lookup.

Quickly access previous Contact Lookups

Quickly view your most recent Contact lookups with the new Lookup Previous feature. This feature contains the last lookups you performed. The data is conveniently categorized by lookup type, time, and the number of contacts in the query.

Calendar Management

Maintain up-to-date ACT! and Outlook calendar information. Plus, gain visibility into your activities with improved calendar viewing and printing.

Configure ACT! and Outlook calendar integration using the Setup Assistant

The new Setup Assistant lets you easily set up calendar integration for new users that you add to your team. **Note:** The Setup Assistant is not available in ACT! Premium for Web.

Copy calendars with one click

Quickly copy your ACT! calendar to Outlook or Outlook calendar to ACT! using the new Calendar Copy feature.

Print ACT! calendars using filters

This enhanced feature lets you print your ACT! calendar with filters that you select. This eliminates the need to reset your print filters to match your calendar filters.

View contact names on calendar printouts

Easily see who is included in your upcoming meetings by viewing the contact names associated with any activity on your monthly calendar printouts.

View the names of multiple contacts on your calendar

Scheduled activities on calendars now show a plus sign (+) to indicate more than one contact instead of <Multiple contacts>. Ellipses indicate more information is available.

View activities for more than 10 users

In ACT! Premium, this enhancement lets you view the activities of all your team members, even if the team is larger than 10.

Database Functions and Automation

Focus more on business activities and less on administrative tasks using new and improved database functions and automation options.

Automate important tasks

New for ACT! (non-premium) users - Using the ACT! Scheduler, you can automate important tasks such as database backups, database maintenance, and copying calendar data between ACT! and Outlook.

Additional time increments for automating tasks

New for ACT! Premium users - You can now schedule automated tasks multiple times a day at the hours you specify.

Simplified remote database installation

This enhancement lets you easily install a remote database.

View length of time for synchronizing data

The new sync progress bar lets you know exactly how your ACT! synchronization is progressing. You can see the length of time it will take for your synchronization to complete and determine which parts of the process completed successfully.

Exclude attachments from backups

You can now exclude attachments from your backup files. This reduces the size of backups and allows the process to complete more quickly.

View information for logged-on users

Quickly view who is logged on to ACT!, the last time they logged on, and their security role.

New features in ACT! 2008 (V10.0)

Company and Group security

ACT! provides better data security for companies by assigning public, private, or limited access to company records. ACT! Premium extends this security to group records.

Dashboards

Dashboards let you view and work with important information like daily schedules, activity lists, top opportunities, and sales figures in one location. From the Dashboard, you can easily see if you are reaching your goals using benchmarks and summary information. Manager and Administrator users can customize the Dashboard and create Dashboards.

Document shortcuts

Add document shortcuts to activity, history, notes, and the Documents tab without having to attach the full document. You can also allow non-users to edit the same document, ensuring you have the most current version in your database.

Duplicate checking for Groups and Companies

Automatically check for duplicate Groups and Companies when creating a new record.

Duplicate naming for Groups and Companies

Enter duplicate subgroup and division names within Groups and Companies. This lets you maintain more consistent Group and Company record structures for improved organization and data accuracy.

Inline editing

Quickly edit Contact, Group, and Company records in list views so you do not have to open each record individually.

Multiple contacts for opportunities

Associate multiple contacts and users with a single opportunity. This lets you track and report on everyone involved with an opportunity.

Opportunity List details

From the Opportunity List view, view all contacts or products associated with an Opportunity without having to open an Opportunity record.

Opportunity data fields

In ACT! Premium, you can turn an Opportunity user field into a date field. This lets you track important dates specific to an Opportunity.

Synchronization subscription list permissions

Restrict remote users from requesting contacts via the subscription list. This reduces problems

when requests fall outside the criteria of the defined Sync Set.

Compatibility

ACT 2008 supports the Microsoft Vista operating system

New features in ACT! 2007 (9.0)

Advanced query editing

Easily edit and save an existing query statement rather than create a new query.

Database maintenance automation

With ACT! Premium, you can use the ACT! Scheduler to create a task for automatic database maintenance even when the database is not open.

Field level security

In the ACT! Premium application, an Administrator or Manager can specify access to individual fields. The fields can be set to Full Access or Read Only Full Access, Read Only, or No Access.

History and Notes preview pane

Preview the content of a history or note in the preview pane on the History or Notes tabs. You cannot edit in the preview pane, but you can copy text from it.

Last E-mail field

Quickly identify the last e-mail send date for a given contact using the Last E-mail field. The field updates anytime an e-mail history is created, even when integrating with Lotus Notes, Outlook Express, or Outlook.

Linked company fields

Using ACT! Premium, you can link additional contact fields to company fields, or remove existing links. A linked field affects all companies in your database. When you update linked fields in a company record, contacts in the company inherit the change.

Microsoft Outlook e-mail integration enhancements

Create ACT! history from within Outlook, attach an Outlook message to ACT! contacts, and create an ACT! contact record from an Outlook e-mail.

Outlook calendar automatic synchronization

Automate when Outlook calendar synchronization occurs, even when the database is not open.

Password policy

In ACT! Premium, Administrators can define a password policy for users that controls the length, complexity, and reuse of their passwords.

Secure History, Notes, and Opportunities en masse

From the contact record, change security access of history, notes, and opportunities at once. This lets you select multiple history, notes, and opportunities and quickly make them public or private.

New features in ACT! 2006 (8.0)

ACT! 2006 includes all of the features from version 2005, plus the following:

Administrative functions for non-administrators

Provide users with select administrative functions in ACT! without providing them full administrative rights. This allows remote users to back up or restore databases, and do database maintenance, ensuring their critical contact information stays intact.

Contact access en masse

From the Contact List in ACT! Premium, select multiple contacts and specify their access to public, private, or limited records all at once.

Companies or Groups - add / remove contacts

From the Contact Detail view, add or remove a contact from multiple groups or companies at one time. Users can also select multiple contacts and link them with a company already in the database.

Company and Groups tree view

Use a tree view for Groups and Companies to easily visualize hierarchy of groups and subgroups as well as companies and divisions.

Database synchronization and backup automation

Using ACT! Premium, you can set a schedule to automate synchronization and database backups.

Group associations view

From the Contact Detail view, users can view all group memberships for that contact.

Hyperlink to Companies from Contact List view

From the Contact List, if a contact is linked to a company record, the company name appears as a hyperlink for quick access to company details.

Lookups by contact access

Using ACT! Premium, quickly determine the contact record that users or teams have access to. Then, assign contact access to new employees, newly formed teams, and so on.

Lotus Notes integration

Send messages through Lotus Notes using the ACT! E-mail client.

Meeting management

Easily update or change a meeting organizer even after the activity has been scheduled.

Opportunity field customization

When creating new opportunities in ACT! Premium, users can select field values from drop-down lists to ensure data consistency. Users can change field names and field types to capture the most accurate information. Fields can be further customized to generate a history, to be mandatory, and so on. Drop-down fields can be locked so other users cannot edit them.

Printed phone numbers on calendars

Print your calendar using the ACT! template so phone numbers for scheduled calls automatically print.

Silent install

With ACT! Premium, you can install, activate, and register ACT! on the server, and then push the deployment of ACT! to users on the network.

Synchronize attachments

Set options to synchronize only attachments related to your selected Sync Set. This will save time and improve performance and security.

Synchronization - Extended database expiration

Database expiration has been extended to 365 days. And even if remote databases expire, they can be synchronized back to the main database one last time so you do not lose critical contact data.

Team membership views

In ACT! Premium, anywhere a team name appears, simply right-click to view individuals that make up that team.

Terminal Services/Citrix support

With Citrix support, multiple users from different offices can access the same ACT! database, without the need for Virtual Private Network (VPN) access.

User permissions customization

Using ACT! Premium, you can set custom permissions for Standard user roles to allow or restrict them from exporting to Excel or from deleting data.

New features in ACT! 2005 (7.0)

Activity Series

This feature allows you to define a series of activities to occur based on an specific date. You can schedule activities in the series for yourself or for other users. The activities are linked—if an activity date changes, you are prompted to change the other dates.

Company records

Create new Company and Division records to get a more complete picture of the entire relationship with any company, including all notes, histories and opportunities. You can link contacts to companies—when core company information changes, the changes occur in the contact records as well. You can easily convert Groups into Companies, and you can create Companies from Contacts (or vice versa).

History and Notes tabs

Separate Notes and History tabs help you track your relationship details for better management of data. You can include unlimited date- and time-stamped notes and histories for each contact to keep track of important conversations, commitments, and meeting notes. You can also share Notes and Histories between contacts.

Opportunity information

A new customizable Opportunity List view lets you quickly access all opportunities. You can update and filter opportunities by User, Estimated Close Date, Status, Sale Stage, Amount, or Probability of Close. You can also quickly access the contact record or perform Lookups from any opportunity in the Opportunity List. You can generate a quote from any opportunity and even customize the quote template with your logo and business information. (Requires Microsoft Word and Excel 2002, 2003, or 2007.)

Microsoft Outlook integration

Use an ACT! database as an address book to send e-mail messages from outlook to ACT! contacts. You can also create history for received messages.

Quick print

The new Quick Print feature lets you quickly print a calendar view without specifying the template.

Reports

ACT! comes with 40 standard reports, which you can customize to meet your needs. Most reports can be exported to HTML, PDF, e-mail, and other formats.

Activity type customizations

Create your own activity types so you can better track activities that are specific to your business. For example, you can define "Billable Hours" as an activity type instead of just using "Meeting," "Call," or "To-Do". You can add and customize up to five levels of priorities according to your preferences.

Calendar views

ACT! calendars now include a Today view, a customizable work week view, and a multiple month Mini-calendar that can be expanded to show the entire year. You can share your calendar with other ACT! users and update it with the company Outlook calendar. (Requires Microsoft Outlook 2002, 2003, or 2007.)

Contact records

Add unlimited secondary contacts to any contact record. This lets you quickly locate alternate or related contacts.

Document attachments

Attach documents to Activities and History items to easily locate those associated with specific activities.

E-mail performance

You can use your ACT! database as an address book when you send e-mails from Outlook and attach emails to contacts (Requires Microsoft Outlook 2002, 2003, or 2007.)

Exporting to Microsoft Excel

Export your Contact, Group, and Opportunity List views to a Microsoft Excel spreadsheet with just one click. All column customizations are maintained and pivot tables are automatically created. (Requires Microsoft Word and Excel 2002, 2003, or 2007.)

Groups and subgroups views

Organize your contacts into groups and up to 15 levels of subgroups. Group records let you view cumulative information from all contacts that belong to that group for a more complete picture. You can also save any lookup as a Group definition to create Groups instantly.

Lookups and searches

Search for all customer data using Lookups, Advanced Lookup, and Keyword Search features. You can search on Create or Edit Date, and you can perform numeric lookups by ranges, such as greater-than or less-than queries—this is ideal when searching in date and numeric fields. You can also save Lookups as queries to define groups and synchronization sets. ACT! will remember your last five lookup terms on any field.

Microsoft Outlook integration

Keep your ACT! Calendar up to date with your company's Outlook calendar. You can set up your ACT! and Outlook activities to synchronize in the background so you can continue working. (Requires Microsoft Outlook 2002, 2003, or 2007.)

Synchronization

Synchronization is easier than ever to set up using a new interface and reusable queries. Even templates and attachments synchronize. A synchronization scheduler ensures that everyone has the latest data. For the utmost consistency, security is enforced through a main-to-remote database relationship, and conflict resolution is automated.