



ACT! by Sage 2008 (10.0) Solutions Feature Comparison Chart

– for ACT! by Sage 2004 (6.0) Customers

NEW & IMPROVED UPGRADE FEATURES

Organize contacts and leads

Company Records

Contacts linked to Companies

Unlimited Secondary Contacts

Separate Notes and History tabs

Notes and History shared between Contacts

Rich Text Formatting including colors, bullets, graphics, URLs

Groups with 15 levels of hierarchy (14 Subgroups)

Dynamic Membership

Attach documents to Activities and History

Synchronize Attachments

Hyperlink to Companies from Contact List view

Split Panel Note Preview

Specify Linked Contact/Company Fields³

Duplicate Checking for Groups and Companies

Group and Company Hierarchy

Advanced Queries for Groups and Companies

Manage daily responsibilities

Rich Text Formatting in Activity details

Five Calendar views

View global events

Group scheduling

ACT! Premium only

Manage Resources including Conference Rooms, Equipment, etc.

ACT! Premium only

Automatic Outlook Calendar sync

ACT! Premium only

Track sales opportunities

Opportunity List view

Opportunity Look-ups

Forecasting tools

Instant Quotes⁴

20+ pre-formatted/redesigned sales Opportunity reports

Graphical sales pipeline with drill down capability

Export to Excel[®]

Multiple built-in ACT! sales processes

Track multiple Products and generate/import Product List

Share drop-down lists across different fields

Customizable Opportunity field names and types with drop-down lists

ACT! Premium only

#1 SELLING CONTACT AND CUSTOMER MANAGER FOR 20 YEARS

ACT! 2008 delivers a range of exciting new features as well as enhancements to existing features, all focused on making ACT! easier to use and more feature-rich, resulting in greater efficiency and productivity for you. The flagship component of the current release is the all-new interactive Dashboard. This sleek, modern Dashboard brings your ACT! data to life and allows you to stay on top of critical activities and opportunities. You'll also receive all the helpful features introduced with releases since ACT! 2004, including direct integration with Microsoft[®] Outlook[®] e-mail¹, separate Notes and History tabs, the ability to create Company Records, five different calendar views, an opportunity list view, 20 redesigned sales reports, and much more.

Additionally, ACT! has grown to include ACT! Premium solutions, including ACT! by Sage Premium 2008 (10.0) and ACT! by Sage Premium for Web 2008 (10.0), that offer scalability² to accommodate large teams of users, advanced opportunity tracking and reporting, advanced security options, centralized administration, and much more.

Upgrade today!

- Call 1-866-795-3711
- Contact your ACT! Certified Consultant
- Visit www.act.com/upgrade/2008

NEW & IMPROVED UPGRADE FEATURES

Multiple Contacts per Opportunity

Opportunity List details

Opportunity Date fields

ACT! Premium only

Communicate more effectively

Built-in Spell Checker

Improved Mail Merge

Validate and correct addresses during Mail Merge

ACT! E-mail Find

Direct integration with Outlook¹

Last E-mail field

Gain business insight

Customizable Priority, Activity, and History types

Save Look-ups as Groups

Customizable drop-downs; multi-select values

Field types – Picture, Yes/No, Memo, E-mail

Tree view for Companies

Interactive Dashboard

Interactive Dashboard shared across team members

ACT! Premium only

Accommodate large teams

View team memberships

ACT! Premium only

Five security levels

Query Based sync

Mark Notes and Opportunities as Private

Improved administration for remote users

Support for Non-Local Machine Administrators⁵

Grant Contact access en masse

ACT! Premium only

Look-up Contacts by access

ACT! Premium only

Custom user permissions

ACT! Premium only

Silent Install⁶

ACT! Premium only

Password rules

Secure Notes, History, and Opportunities en masse

Field level security

ACT! Premium only

Automatic database functions

ACT! Premium only

Company security⁷

Group and Company security⁸

ACT! Premium only

Access while mobile or remote

Citrix[®] or Terminal Services⁹ support

Windows[®] Mobile 5.0 and BlackBerry^{®10}

Integrate with accounting solutions¹⁰

Simply Accounting by Sage, Sage MAS 90, Sage MAS 200, Sage BusinessWorks

- 1 During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook. ACT! must be added as an Outlook address book to use this feature.
- 2 Published minimum system requirements are based on single user environments. Actual scalability and number of networked users supported will vary based on hardware and size and usage of your database. Sage Software scalability recommendations are based on in-house performance tests using the recommended server system requirements found at: www.act.com/2008sysreq. You must purchase one license of ACT! per user.
- 3 Not all fields can be linked and linked field types must be compatible.
- 4 Requires Microsoft Excel and Word 2002, 2003, and 2007.
- 5 Must be a member of the Windows administrator's group to perform the following: Install, register, and activate ACT!. Features such as ACT! Scheduler (Premium product only), sharing database with other users, and changes to handheld sync settings must be performed by a Windows administrator.
- 6 Delivered as an MSI package. Software to distribute MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.
- 7 In order to utilize Company Security, you must add the Company Access control to your layout.
- 8 Limited access Group and Company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 9 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.
- 10 Requires additional purchase.

Important Note for all customers: Sage Software recommends you carefully review all ACT! system requirements at www.act.com/2008sysreq to ensure your system meets these requirements.

Compatibility with ACT! Solutions: ACT! 2008 cannot be used in conjunction with ACT! Premium 2008 (EX or ST Edition) or ACT! Premium for Web 2008 (EX or ST Edition). 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! 2008 (10.0) solutions are not compatible with ACT! for Palm OS[®] 2.0.

Regarding ACT! Add-on Solutions: Certain ACT! add-on solutions may not be compatible with ACT! 2008 solutions. Please visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

Bold items indicate new/improved features included with the ACT! 2008 release. Features marked as Premium only require an upgrade to ACT! Premium.

Note: This chart does not include ACT! Premium for Web.

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