

# ACT! | Feature Chart

## ACT! by Sage Product Comparison Chart

Choose the solution that best fits your business needs.

Features	ACT! by Sage	ACT! by Sage Premium	ACT! by Sage Corporate Edition
<b>Manage Relationships</b>			
60+ pre-defined fields for contact details, e-mails, and phone numbers	✓	✓	✓
Note, history, activity, and document tracking	✓	✓	✓
Social media profiles	✓	✓	✓
Last communication fields	✓	✓	✓
Duplicate checking	✓	✓	✓
Record merge	✓	✓	✓
Related contacts	✓	✓	✓
Group and company tracking	✓	✓	✓
Automatic add and remove of contacts in groups and companies	✓	✓	✓
Linked company and contact fields <sup>1</sup>	✓	✓	✓
Tabbed interface	✓	✓	✓
Big "easy" buttons	✓	✓	✓
Right-click <sup>2</sup> and one-click functionality	✓	✓	✓
Type-ahead	✓	✓	✓
Multi-select drop-downs	✓	✓	✓
"Layman" verbiage throughout	✓	✓	✓
Setup assistance for configuring preferences	✓	✓	✓
In-context help, feature tours, and documentation	✓	✓	✓
<b>Search</b>			
Central search	✓	✓	✓
Lookups on all fields	✓	✓	✓
Advanced queries	✓	✓	✓
Activity, opportunity, document, and user lookups	✓	✓	✓
Save lookups as groups and companies	✓	✓	✓



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**ACT!**  
 by Sage

Certified Consultant

Features	ACT! by Sage	ACT! by Sage Premium	ACT! by Sage Corporate Edition
<b>Be More Productive</b>			
Activities tied to contact records	✓	✓	✓
Editable priority, activity, and history types	✓	✓	✓
Activity series <sup>3</sup> for activities with multiple steps	✓	✓	✓
Activity rollover	✓	✓	✓
Multiple calendar views	✓	✓	✓
Filterable task list view	✓	✓	✓
Activity alarms	✓	✓	✓
Calendar pop-ups	✓	✓	✓
Calendar access by user	✓	✓	✓
At-a-glance user availability <sup>4</sup>		✓	✓
Manage and define resources		✓	✓
Conflict notification		✓	✓
Activities for 10+ users viewable on your ACT! calendar		✓	✓
<b>Market Effectively</b>			
E-mail marketing <sup>5</sup>	✓	✓	✓
Drip marketing <sup>5</sup>	✓	✓	✓
Survey and Web forms <sup>5</sup>	✓	✓	✓
Marketing results tab <sup>5</sup>	✓	✓	✓
Attach e-mails to contacts	✓	✓	✓
Preformatted templates for e-mails and letters	✓	✓	✓
Mail merge to contacts and groups	✓	✓	✓
Validate and correct addresses during mail merge	✓	✓	✓
History of all customer correspondence	✓	✓	✓
<b>Sell More</b>			
Opportunity note, history, activity, and document tracking	✓	✓	✓
Product and service tracking	✓	✓	✓
Built-in ACT! sales stages	✓	✓	✓
Opportunity date fields	✓	✓	✓
Opportunity designations as open, closed-won, closed-lost, and inactive	✓	✓	✓
Instant quotes <sup>4,6</sup>	✓	✓	✓
Filterable opportunity list view	✓	✓	✓
Opportunity list export to Microsoft® Excel®	✓	✓	✓



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Features	ACT! by Sage	ACT! by Sage Premium	ACT! by Sage Corporate Edition
<b>Measure Results</b>			
Interactive activity, opportunity, and user dashboards	✓	✓	✓
Dashboard targets	✓	✓	✓
Dashboard with team views		✓	✓
Interactive pipeline report with drilldown capability	✓	✓	✓
50+ preformatted report templates	✓	✓	✓
Export reports to Excel, HTML, PDF, or e-mail	✓	✓	✓
Activity reports by user		✓	✓
Connector for third-party report writers	✓	✓	✓
<b>Share and Secure</b>			
Data sharing with 1-10 users	✓	✓	✓
Data sharing with 10+ users		✓	✓
Viewable team memberships		✓	✓
Secured contacts, notes, history, and opportunities	✓	✓	✓
Field level security		✓	✓
Company security <sup>7</sup>	✓	✓	✓
Group and company security <sup>7</sup>		✓	✓
Five security roles for users	✓	✓	✓
User permissions and access specifications	✓	✓	✓
Password rules	✓	✓	✓
<b>Personalize<sup>3</sup></b>			
Layout designer for editing layouts	✓	✓	✓
Field types designated as date, currency, yes/no, expansive memo, and picture	✓	✓	✓
Remove, edit, or add fields	✓	✓	✓
Add values to drop-downs	✓	✓	✓
Customizable menus <sup>4</sup> , toolbars, columns, and navigation bar	✓	✓	✓
Customizable sales processes	✓	✓	✓
Customizable opportunity field names and field types	✓	✓	✓
Customizable dashboards with the dashboard designer	✓	✓	✓
Customizable reports with the report designer	✓	✓	✓
ACT! online community for free downloads	✓	✓	✓
ACT! Software Development Kit (SDK)	✓	✓	✓
Enhancement solutions developed by third-party <sup>8</sup> vendors	✓	✓	✓
<b>Access</b>			
Online access			✓
Offline access	✓	✓	✓
Mobile access, including BlackBerry <sup>®</sup> and iPhone <sup>™ 9</sup>	✓	✓	✓
Citrix <sup>®</sup> or terminal services	✓	✓	✓

Features	ACT! by Sage	ACT! by Sage Premium	ACT! by Sage Corporate Edition
<b>Integrate</b>			
Office and Outlook® integration <sup>10</sup>	✓	✓	✓
Send meeting invites from ACT! to any iCalendar connected calendars	✓	✓	✓
Contact <sup>4</sup> and activity creation from Outlook e-mails	✓	✓	✓
Share ACT! contacts in vCard format	✓	✓	✓
Lotus Notes® integration	✓	✓	✓
Excel import and export	✓	✓	✓
Internet Explorer® and Macintosh® Safari® integration with ACT! Premium for Web <sup>11</sup>			✓
Sage accounting solutions integration	✓	✓	✓
<b>Administer and Maintain<sup>3</sup></b>			
Automatic backup	✓	✓	✓
Automatic database maintenance	✓	✓	✓
Automatic synchronization	✓	✓	✓
Silent install <sup>12</sup> administration and activation		✓	✓
Automatic install updates		✓	✓
Volume-based discounted pricing (5 seats or more)			✓
Dedicated account manager			✓
Dedicated pre-sales support teams			✓
Opportunity to purchase premium support			✓
Exclusive offers and promotions			✓
Access to and assistance with ACT! developer tools			✓

- 1 Not all fields can be linked and linked field types must be compatible.
- 2 In ACT! Premium for Web, this feature may behave differently.
- 3 In ACT! Premium for Web, administrative functions must be performed on the Web server.
- 4 This feature is not available in ACT! Premium for Web.
- 5 Requires additional subscription.
- 6 Requires Microsoft Excel and Word 2002, 2003, or 2007.
- 7 Limited access group and company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 8 Sage and its affiliates are in no way liable or responsible for any claims made related to products or services provided by third party vendors. Sage does not guarantee the quality of third party products or services.
- 9 Requires additional purchase.
- 10 Outlook calendar integration is not available in ACT! Premium for Web.
- 11 This feature is only available in ACT! Premium for Web on machines running a Safari® browser on a Macintosh® OS. The ACT! Word Processor and Microsoft Outlook integration are not available using this feature.
- 12 Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.

\* Certified Consultants are third party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third party vendors.

**Important Note:** Review ACT! system requirements at [www.act.com/2010sysreq](http://www.act.com/2010sysreq). You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. Check with your add-on product provider to determine compatibility.

**About ACT!**

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

**About Sage CRM Solutions**

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

