



ACT! by Sage 2010

REVIEW DATE: 10.13.09

BOTTOM LINE:

ACT! 2010 has superbly powerful desktop and small-network contact management, plus a much lower learning curve than in earlier versions.

PROS:

Extremely powerful and flexible contact, task, and calendar management. Tight Outlook integration. Links to web services and social-network pages. Interface vastly improved over earlier versions.

CONS:

Interface sometimes requires too many steps to perform simple tasks. Full search features not available in some dialogs. Some confusing terminology.

COMPANY:

Sage Software Inc

SPEC DATA

Price: \$299.00

Type: Business, Professional

OS Compatibility: Windows Vista, Windows XP

Tech Support: phone, email

EDITOR RATING: ●●●●○

By [Edward Mendelson](#)

ACT! by Sage 2010, already the most powerful contact management program for small and medium businesses, now sports a sleek, modern interface that makes the software's multitude of features easy to use even for new users who may have been overwhelmed by earlier versions. This latest edition retains all its amazing powers to organize, link, and display data on contacts and companies, together with its tight integration with Microsoft Outlook, while, for the first time, it adds the ability to link to social networking sites like Facebook or LinkedIn and [online services](#) like Google Maps. I'm more impressed than ever by ACT!'s ability to combine in a single interface desktop-centric data like the Outlook address book and Calendar with the online information that I increasingly rely on.



Installation and Features

I tested ACT!'s basic version, which allows ten users to share contacts, calendars, and other information. Each user can fine-tune the information that other users can view. (A Premium version extends sharing features to larger [businesses](#).) After a wizard-based installation that creates an empty database, I imported contacts and calendar data from Outlook, a task that took about twenty minutes to import 2200 names. When opening a contract entry, ACT! displays traditional address-book fields in the top half of the window, together with fields listing my most recent activities relating to that contact. A tabbed interface in the bottom half of the window has twelve tabs each leading to more detailed information than can fit in the top half.

An "activities" tab shows a tabular color-coded list of calls, meetings, e-mails, and other connections I've made with a contact. An "opportunities" tab lists tasks I've set up so that I can follow through on a sales pitch or negotiation. Other tabs lead to notes, documents, and various categories that the contact belongs to, social networking and other [web pages](#), and much more. There's a more information available with only a few

clicks than in any standard PIM, but the layout is clear enough to keep it from being overwhelming.

As in previous versions, when you click a button to write a letter to a contact, ACT! opens Microsoft Word (or ACT!'s built-in word processor) and inserts your contact's address at the top and your signature at the bottom of the document. Or you can choose a document template and start with boilerplate text already in your letter. When you exchange e-mails with contacts, ACT! automatically keeps a record of it. When you click on an e-mail address anywhere in ACT!, Outlook (or any other standard mail client that you prefer) creates a blank message. ACT! keeps its own full-featured calendar, which it can synchronize with Outlook's calendar at user-specified intervals. Unfortunately, ACT!'s web-based features don't extend to direct integration with online calendars like Google Calendar, but you can get around this limitation by sharing your Outlook calendar with both Google and ACT!

The Web page integration works by searching for your contact's name in LinkedIn, Facebook, or other sites in an embedded browser window. You may need to make a click or two on the resulting social network page to find your contact's actual personal page. There seems to be no way to store that URL with the contact's information so that you won't have to search again next time, but it's better than nothing. (Warning: don't click on the Edit Fields button on the Web Info page and put your contact's URL in the LinkedIn or Facebook field, because that will make this contact's page appear in the Web Info page for all your other contacts.)

Overall, ACT!'s revamped interface looks and acts a lot like Outlook. The old tiny-icon toolbar is replaced by a new toolbar with large buttons. The sidebar at the left of the main window, formerly a simple stack of icons, now adds a search field at the top that saved me dozens of trips to the Lookup button when I wanted to find [data](#).

After installing ACT!, Outlook gets a new toolbar that lets you click a button and create a new ACT! contact from the sender of a message, or link the message to a contact in ACT!'s address book. Frustratingly, the link-message feature brings up a dialog box that only lets you search for an ACT! contact by last name. If you remember only the first name, you'll have to switch to ACT! and use its search feature to find the contact's last name, then switch back to Outlook to link the message.

Similar interface glitches get in the way in many of ACT!'s dialogs. For example, when you open the Add/Remove dialog that lets you select a group or company name to which you want to attach a contact, you won't find a button that lets you create a new group or company name. Instead you have to close the dialog, click on the New button in the top toolbar, create the new group or company name, and then go back to the Add/Remove dialog. This is a surprising annoyance in an otherwise sleekly-designed interface, but such minor glitches don't seriously detract from ACT!'s smooth-running power and the intricate but clear integration of its features.

Bottom Line

This new version, with its sleeker interface and new web features, is probably a must-have upgrade for existing users, and is sure to attract new users who were discouraged by the steep learning curve of earlier versions. There's nothing else as effective as ACT! for keeping track of [business](#) contacts and activities, and the program finally has the interface it deserves.

More Contact Manager & PIM Reviews:

Copyright (c) 2009Ziff Davis Media Inc. All Rights Reserved.