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Review: ACT by Sage 2009

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Faces vaguely ring bells and names elusively reside at the tips of tongues, and if you need to effectively manage contacts in our electronic age, you're probably a candidate for [ACT by Sage 2009](#), the latest version of the well-known contact manager.

A virtual lifeline for business owners, sale professionals and company representatives, contact managers such as ACT - one of the few that remains from a deep pool of competitors - help you manage contacts and track your interactions with them.

ACT not only manages contact information of the name-address-phone-number-e-mail variety, it also schedules activities and tasks and records contact-related communications including: e-mail, letters, proposals and phone calls, as well as your own observations and notes. It remains a superb program and does a great job of managing the entire sales process from meet-and-greet to closing and beyond.

Getting the ACT Together

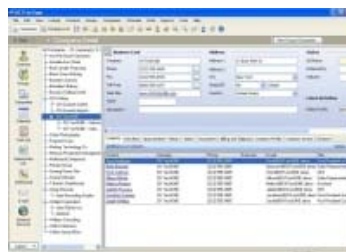
In version 2009, ACT increases its integration with Microsoft Outlook and enhances its database search capabilities. While these may sound like incremental improvements, the new Outlook integration makes the program a worthy upgrade - something that's all too rare these days in an era of empty "upgrades."

ACT comes in a standard version for individuals and small businesses and in a Premium version for larger teams and corporate workgroups. ACT Premium adds team-oriented features such as the Dashboard that serves team views and oversees contacts and activities, as well as activity reports that you can break down by user. Most important, Premium allows you to view the calendars activities for ten or more people. Premium also adds Web access in its Corporate Edition.

From here, the sky is seemingly the limit with various ACT flavors, for example for financial professionals and another for people in real estate. Sage also offers add-ons to integrate ACT with a BlackBerry, Pocket PC or Treo Smartphone; or to link with accounting programs such as Peachtree and QuickBooks.

New in 2009

ACT now offers a feature called "En masse e-mail attaching." This lets you select multiple Microsoft Outlook e-mails - from different senders - and quickly attach them to the contact of your choice. Now, within Outlook, you can click on an ACT button to easily attach an e-mail to an ACT contact.



ACT remains a powerful means to manage just about everything that you do with contacts.

Another new feature lets you rely on Outlook rules to manage your inbox e-mail. Using this, for example, you can configure the system so any e-mail from a particular contact automatically becomes a part of a contact's ACT history.

You can also create ACT activities from within Outlook e-mails, which is useful for scheduling follow-ups, meetings or tasks. You can copy an ACT calendar to an Outlook calendar with a single click from the main ACT toolbar, and vice versa.

ACT has enhanced lookups so you can search for a contact using only a part of a name or title. For example, you can type-in "manager" and pull up all the permutations: sales manager, warehouse manager, etc. You can conveniently switch between contacts, groups or companies to modify searches without starting over. And you can access advanced queries from the main lookup toolbar to carry over and refine previous searches - a big convenience.

The program now offers fast access to your most recent contact lookups, which lets you view these lookups by type, date, time stamp and number of contacts.

And finally, you can apply calendar filters to printouts. Yes, you can now print ACT calendars based on priorities and date ranges - and display selected users - just the way that you see them on screen. This feature was long, long overdue.

Previously available only in ACT Premium, you can now automate tasks such as copying calendars and backing up databases in the basic version of ACT. There's also an improved status bar that lets you view the progress of database synchronization and the time that remains in the process.



The Dashboard offers an intuitive page that oversees the activities of teams and workgroups.

Retaining the Right Stuff

While ACT comes with some welcome new enhancements, Sage has maintained everything that was good in prior versions. The product does a first-rate job of tracking and organizing an abundance of information and clearly presenting it on intuitive screens.

You can have lots of letters, linked files, groups, phone calls, histories, notes and alerts associated with your contacts, and ACT manages to present it all in an intelligible manner. It's a comfort to be able to receive a phone call and quickly bring up a contact's entire history – that's the true power of ACT

As before, the program tracks to-do lists and allows you to perform and record merged mailings on paper or via e-mail. Alarms remind you of appointments. The power of ACT, particularly the Premium version, is its capability to share data and its calendars throughout a team or across a division or company.

Putting on a Good Face

For those of you already familiar with ACT, the interface remains much the same. There are some minor quirks such as search parameters and report options that seem obvious but aren't available in certain screens. Long-time customers have simply learned to live with these inconsistencies that probably stem from longtime conventions and the product's evolution. Even a product this sophisticated and powerful has a few rough spots.

While ACT is powerful and intuitive, there is something of a learning curve involved in using it. Newbies will be able to quickly manage small groups of contacts, but when you add more information to take advantage of the true, comprehensive power of ACT and oversee a myriad of companies, people, tasks and events, things can become rather complicated. But it all, somehow, makes sense in the end.

Longtime customers who rely on Microsoft Outlook, and that's probably most of them, will welcome this upgrade.

Pricing

- For individual and small teams, ACT sells for \$229.99 (upgrade \$169.95).
- ACT Premium costs \$399.99 MSRP (upgrade \$259.95 MSRP)
- ACT Premium – Corporate Edition, which includes ACT Premium and ACT Premium for Web, costs \$459.99 MSRP (upgrade \$299.95 MSRP).
- ACT 2009 and ACT Premium 2009 are available immediately, at no cost, for North American customers who subscribed to the ACT Platinum Care service. ACT products are also available through more than 700 [ACT Certified Consultants](#).