



	ACT! 2009 (11.0)	ACT! Premium Solutions 2009 (11.0)
<b>Calendar and Activity Management</b>		
Schedule calls, meetings, and to-dos, plus custom activities	✓	✓
Edit Priority, Activity, and History types	✓	✓
Track activities on Contact Records	✓	✓
Schedule an Activity Series <sup>3</sup> for activities with multiple steps	✓	✓
Multiple calendar views	✓	✓
Filterable Task List view	✓	✓
Activity alarms	✓	✓
Activity rollover	✓	✓
Calendar pop-ups	✓	✓
Outlook® Calendar integration	✓	✓
Automatic ACT! and Outlook calendar copying	✓	✓
Grant calendar access by user	✓	✓
At-a-glance user availability		✓
Manage and define resources		✓
Conflict notification		✓
<b>Sales Opportunity Management</b>		
Built-in or custom sales process with multiple steps	✓	✓
Track product/services, details, and more for each sales opportunity	✓	✓
Automatically track the number of days a sales opportunity has been open	✓	✓
Input Opportunity Date fields		✓
Set sales opportunities as open, closed–won, closed–lost, and inactive	✓	✓
Associate contacts, groups, and companies with each sales opportunity	✓	✓
Generate Instant Quotes <sup>4,5</sup>	✓	✓
Filterable Opportunity List view	✓	✓
Schedule a follow-up activity directly from the Opportunity	✓	✓
Export the Opportunity List to Microsoft® Excel®	✓	✓
<b>Prospect and Customer Communications</b>		
ACT! and Outlook e-mail integration	✓	✓
Create activities and contacts from Outlook e-mails	✓	✓
Built-in e-mail with integration options, including Outlook Express and Lotus Notes®	✓	✓
Attach e-mails to contacts	✓	✓
Use preformatted templates for e-mails and letters	✓	✓
E-mail and letter Mail Merge to a contact or groups of contacts	✓	✓
Manage Mail Merge when contact records have missing e-mail addresses	✓	✓
Validate and correct addresses during Mail Merge	✓	✓
Last communication fields, including e-mail, meeting, and more	✓	✓
History of all customer correspondence	✓	✓
<b>Dashboards and Reporting</b>		
Interactive Activity and Opportunity dashboards	✓	✓
Dashboard targets	✓	✓
Copy the dashboard to PowerPoint®	✓	✓
Dashboards with team views		✓
40 preformatted report templates, with 20 focused on sales opportunities	✓	✓
Interactive pipeline report with drilldown capability	✓	✓
Export most reports to Excel, HTML, PDF, or e-mail	✓	✓
Report on activities by user		✓

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<b>Data Sharing and Security</b>		
Share data with up to 10 users <sup>6</sup>	✓	✓
Share data with 50+ users <sup>7</sup>		✓
View activities for 10+ users on your ACT! calendar		✓
Report on activities by user		✓
View team memberships		✓
Mark contacts as private	✓	✓
Field level security		✓
Secure notes, history, and opportunities	✓	✓
Company security	✓	✓
Group and Company security <sup>8</sup>		✓
Five security roles for users	✓	✓
Specify user permissions and access	✓	✓
Password rules	✓	✓
<b>Codeless Customization<sup>3</sup></b>		
Layout Designer for editing layouts	✓	✓
Designate field types as Date, Currency, Yes/No, Expansive Memo, and Picture	✓	✓
Remove, edit, or add fields	✓	✓
Add values to drop-downs	✓	✓
Customize menus, toolbars, columns, and the navigation bar	✓	✓
Customize sales processes and stages	✓	✓
Customize Opportunity field names and field types		✓
Drop-downs in Opportunities		✓
Customize the dashboards with the Dashboard Designer <sup>9</sup>	✓	✓
Customize reports with the Report Designer	✓	✓
<b>Administration<sup>3</sup></b>		
Automatic backup	✓	✓
Automatic database maintenance	✓	✓
Automatic synchronization	✓	✓
Silent Install <sup>10</sup> administration and activation		✓
Automatic install updates		✓
Microsoft SQL Server <sup>®</sup> 2005 Express Edition	✓	✓
Microsoft SQL Server 2005 Express Edition and SQL Server 2005 Standard Edition		✓
<b>Anywhere Workforce</b>		
Mobile devices, including Palm OS <sup>®</sup> , Pocket PC, BlackBerry <sup>®11</sup> , and iPhone <sup>™115</sup>	✓	✓
Windows or offline access	✓	✓
Web access		✓
Citrix <sup>®</sup> or Terminal Services <sup>12</sup>	✓	✓
Sync Services		✓
Templates for popular paper organizers for printed schedules	✓	✓



**NORTHBROOK**  
Consulting Group, Inc.

Linking Technology & Strategy for Results

One Northbrook Plaza  
5 Revere Drive Suite 200  
Northbrook, IL 60062  
847.498.7323



Authorized Partner

www@northbrookconsulting.com  
e-mail: mail@northbrookconsulting.com

