



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

| FEATURES | ACT! 2008 | ACT! Premium 2008 | ACT! Premium for Web 2008 |
|----------|-----------|-------------------|---------------------------|
|----------|-----------|-------------------|---------------------------|

**#1 SELLING CONTACT AND CUSTOMER MANAGER FOR 20 YEARS**

ACT! by Sage solutions enable individuals, small businesses, workgroups and sales teams to improve productivity by helping them centrally organize contact and calendar information, manage daily responsibilities, and communicate more effectively. ACT! is easy to learn and use, customizable to fit a variety of businesses, and affordable with a low total cost of ownership. ACT! offers multiple deployment and access options, including Windows®, Web-based, and mobile. With more than 2.7 million individual users and 38,000 corporate accounts in 25 countries, ACT! continues to lead the industry in helping customers like you connect and succeed.

**Inquire today!**

- Call 1-866-795-3711
- Contact your ACT! Certified Consultant
- Visit [www.act.com](http://www.act.com)

**Organize contacts and leads**

|  |   |   |   |
|--|---|---|---|
| Track contact details, Notes and History, appointments, to-do items, and Opportunities | ■ | ■ | ■ |
| Documents and document shortcuts   | ■ | ■ | ■ |
| 60+ pre-defined fields   | ■ | ■ | ■ |
| Prevent and eliminate duplicate Records*   | ■ | ■ | ■ |
| Virtually unlimited date-and time-stamped Notes and History                            | ■ | ■ | ■ |
| Notes and History shared between Contacts  | ■ | ■ | ■ |
| Company Records with Contacts linked to Companies                                      | ■ | ■ | ■ |
| Groups with 15 levels of hierarchy (14 Subgroups)                                      | ■ | ■ | ■ |

**Manage daily responsibilities**

|   |   |   |   |
|---|---|---|---|
| Calls, meetings, and to-dos                                   | ■ | ■ | ■ |
| Multiple calendar views with calendar pop-ups                 | ■ | ■ | ■ |
| Activity alarms and automatic activity rollover               | ■ | ■ | ■ |
| Activity conflict notification                                | ■ | ■ | ■ |
| Recurring activities  | ■ | ■ | ■ |
| Activity Series*  | ■ | ■ | ■ |
| Group scheduling  |   | ■ | ■ |
| Manage Resources including Conference Rooms, Equipment, etc.* |   | ■ | ■ |
| Outlook calendar sync   | ■ | ■ |   |
| Automatic Outlook calendar sync                               |   | ■ |   |
| View global events  | ■ | ■ | ■ |

**Track sales opportunities**

|  |   |   |   |
|--|---|---|---|
| Built-in ACT! sales process*   | ■ | ■ | ■ |
| Opportunity List view  | ■ | ■ | ■ |
| Customizable Opportunity field names and types with drop-down lists* |   | ■ | ■ |
| Generate and import Product List*                                    | ■ | ■ | ■ |
| Instant Quotes <sup>1</sup>  | ■ | ■ |   |
| Graphical sales pipeline   | ■ | ■ | ■ |
| Pre-formatted sales reports  | ■ | ■ | ■ |
| Export to Excel®   | ■ | ■ | ■ |

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|----------|-----------|-------------------|---------------------------|
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### Communicate more effectively

|   |   |   |   |
|---|---|---|---|
| ACT! E-mail Client  | ■ | ■ |   |
| Direct integration with Outlook <sup>2</sup>                                  | ■ | ■ | ■ |
| History of all customer correspondence  | ■ | ■ | ■ |
| Last Communication fields   | ■ | ■ | ■ |
| Built-in word processor   | ■ | ■ | ■ |
| Pre-formatted templates – e-mails, letters, memos                             | ■ | ■ | ■ |
| Mail Merge <sup>3</sup> with letter or e-mail; validate and correct addresses | ■ | ■ | ■ |

### Gain business insight

|   |   |   |   |
|---|---|---|---|
| Look-ups and Keyword Search                                 | ■ | ■ | ■ |
| Look-up Contacts by access*                                 |   | ■ | ■ |
| Numeric look-ups  | ■ | ■ | ■ |
| 40 standard reports, including 20 sales Opportunity reports | ■ | ■ | ■ |
| Interactive Dashboard                                       | ■ | ■ | ■ |
| Interactive Dashboard shared across team members            |   | ■ | ■ |
| Report Designer*  | ■ | ■ | ■ |
| Report on activities by user                                |   | ■ | ■ |
| Customizable Priority, Activity, History types*             | ■ | ■ | ■ |
| Field types – Picture, Yes/No, Memo, E-mail*                | ■ | ■ | ■ |
| Layout Designer*  | ■ | ■ | ■ |
| Customizable drop-downs; multi-select values*               | ■ | ■ | ■ |
| Customizable navigation bar                                 | ■ | ■ |   |

### Accommodate large teams

|                               |   |   |   |
|-------------------------------|---|---|---|
| Password rules*               | ■ | ■ | ■ |
| Five security levels          |   | ■ | ■ |
| Custom user permissions       |   | ■ | ■ |
| View team memberships*        |   | ■ | ■ |
| Automatic database functions* |   | ■ | ■ |
| Silent Install <sup>4</sup>   |   | ■ |   |

### Access while mobile or remote

|  |   |   |   |
|--|---|---|---|
| 20 templates designed for popular paper organizers | ■ | ■ | ■ |
| Print any ACT! calendar template                   | ■ | ■ | ■ |
| Citrix® or Terminal Services <sup>5</sup> support  | ■ | ■ | ■ |
| Synchronize with handheld devices <sup>6</sup>     | ■ | ■ |   |

### Integrate with accounting solutions<sup>6</sup>

|   |   |   |  |
|---|---|---|--|
| Peachtree by Sage, QuickBooks® Professional / Premier, Simply Accounting by Sage, Sage MAS 90, Sage MAS 200, Sage BusinessWorks | ■ | ■ |  |
|---|---|---|--|

- <sup>1</sup> Requires Microsoft Excel and Word 2002, 2003, and 2007.
- <sup>2</sup> During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook.
- <sup>3</sup> In ACT! Premium for Web, mail merge functionality is available using the ACT! Word Processor, but not using Microsoft® Word.
- <sup>4</sup> 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.
- <sup>5</sup> Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.
- <sup>6</sup> Requires additional purchase.

**Important Note for all customers:** Sage Software recommends you carefully review all ACT! system requirements at [www.act.com/2008systemreq](http://www.act.com/2008systemreq) 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](http://www.actsolutions.com) or check with your add-on product provider to determine compatibility.

\*Asterisks in this chart indicate: In ACT! Premium for Web, this operation must be performed on the Web server.

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