



ACT! BY SAGE 2008 (10.0)

ACT! is the #1 selling contact and customer manager that helps you organize contact information, manage daily responsibilities, and communicate more effectively to improve your productivity. With over 2.7 million users and 41,000 corporate customers, ACT! has maintained its position as #1 for 20 years because it's renowned for being easy to learn and use, and is an effective solution for anyone who regularly works with contacts.

ACT! can be used out-of-the-box or customized to suit your needs, and also integrates with everyday tools like Microsoft® Outlook®, Word, and Excel®. With ACT! you'll have critical contact details at your fingertips so you can focus on what's most important to your business – building strong customer relationships.

ACT! is for individuals and small business customers in a variety of industries looking to organize contact information, manage daily responsibilities, and communicate more effectively to improve your productivity.

Why Should You Choose ACT!?

- Keep important contact details in one place with ACT! so you have quick access to the information you need.
- Be up and running quickly because ACT! is easy to learn and use.
- Manage your daily responsibilities so important calls, meetings, and to-dos don't slip through the cracks - and ultimately improve your productivity!
- Integrate ACT! with everyday applications, including Office, so you can work the way you're accustomed.
- Use ACT! out-of-the box or highly customized to fit the needs of your business.
- Get a snapshot of critical information with the ACT! [Dashboard](#). See your tasks, meetings, priorities, and more in a single view and drill down for details.

Get a complete, integrated view of your relationships with ACT!.

 [View Chart](#)



Contact and Customer Manager



ACT! BY SAGE PREMIUM SOLUTIONS 2008 (10.0)

ACT! by Sage Premium solutions are feature-rich, scalable¹ contact and customer management solutions specifically designed to meet the needs of sales professionals, sales management, and IT professionals. With ACT! Premium solutions, your organization will benefit from centralized contact and customer information while utilizing powerful sales productivity functionality – plus ACT! Premium solutions are easy-to-implement and easy-to-maintain.

ACT! Premium solutions include both Windows® and Web-based options, plus ACT! by Sage Premium Dual Access, which includes both Windows and Web access for each user in your organization.

ACT! Premium solutions are for sales professionals who need an easy-to-use, feature-rich solution that streamlines daily functions, so they can focus on selling rather than administrative tasks. ACT! Premium solutions enable sales professionals to centralize contact data, track and report on sales opportunities, manage daily responsibilities, and effectively communicate with customers and prospects. ACT! Premium solutions can be personalized² to suit individual needs, including defining Priority, History, and Activity types, to capture actionable, business-critical information. In addition, ACT! Premium solutions offer flexible deployment access options, including Windows®, Web, and mobile, so users always have accurate opportunity information close at hand.

Why Should You Choose ACT! Premium Solutions?

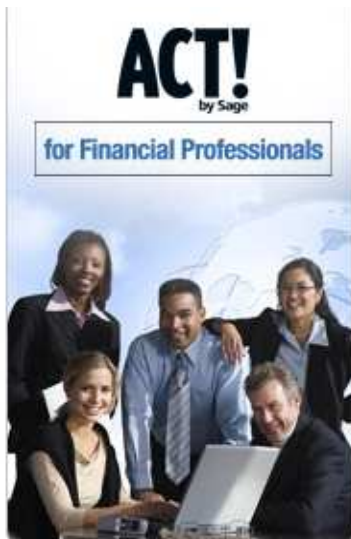
- Keep important contact details in one place with ACT! Premium solutions so you have quick access to the information you need.
- Manage your daily responsibilities so important calls, meetings, and to-dos don't slip through the cracks.
- Communicate more effectively with your contacts to build stronger relationships.
- Get up and running quickly because ACT! Premium solutions are easy to learn and use.
- Use ACT! Premium solutions as-is or highly customized² to fit your needs.
- ACT! Premium solutions with everyday applications, including Office, so you can work the way you're accustomed.

- Forecast and track sales opportunities for insight into your pipeline.
- Get a comprehensive view of your top priorities and sales opportunities with dashboards and take action immediately, plus provide managers with the reports they frequently request.
- Access critical information while mobile³ or remote so you have ACT! data with you at all times.



ACT! Premium means

Shared data	Meet the needs of your team with shared data for up to 10 users.
Reporting	Access to 40 standard reports or create your own for complete tracking and analysis
Customization	Customize ACT! And capture data unique to your business allowing to make more insightful business decisions.
Integration	Seamlessly integrate ACT! With the business applications you use everyday
Mobility	Synchronize data to your handheld device and take critical information on the go



ACT! BY SAGE FOR FINANCIAL PROFESSIONALS 9.0

With more than 2.7 million individual users and 41,000 corporate customers, ACT! continues to be the #1 contact and customer management solution across all market segments, with a particularly high adoption rate in Financial Services.

ACT! for Financial Professionals solutions were designed for professionals in the Financial Services market. These solutions enable the centralizing of important prospect, client, and associated financial information and sharing of information across teams. The organization benefits from more secure contact and financial data, defined tracking processes, and assistance with compliance reporting. With ACT! for Financial Professionals solutions, you not only improve access to critical contact information, but also provide increased protection for your organization with detailed records of all interactions.

Overview

Designed specifically for financial services professionals, ACT! for Financial Professionals delivers comprehensive contact and compliance management solutions that equip you and/or your team with the tools you need to enhance client retention and growth while helping you maintain corporate compliance and tracking standards.

Why Choose ACT! for Financial Professionals?

- Logically capture critical financial details for each contact, utilizing industry-specific layouts and fields.
- Centralize key prospect and client data for immediate access and high levels of service.
- Quickly update the primary address for a client to ensure communications are received in a timely manner.
- Reduce the risk of losing critical contact and client information.
- Data portability to take client information when making calls outside of the office.
- Increase quality and effectiveness of communications to encourage client trust.
- Stay on top of all client commitments to provide better service and increase revenue.

- Manage and grow your client base using top-notch prospecting and marketing campaigns to increase your client touches.
- Prioritize your demanding work day to ensure you are as productive as possible.
- Easily perform look-ups to deliver faster customer service.
- Manage prospects from initial inquiry to full client status.
- Report on activities associated with client and prospect status for a complete view of your business' health.
- Stay productive by taking critical contact, appointment, and to-do information on-the-go.

Additionally, your ACT! for Financial Professionals purchase includes ACT! Business Care¹, an exceptional maintenance service plan that includes priority access to senior product support specialists, and product upgrades and updates², all ensuring the best possible experience for your organization.

Should you be considering ACT! Premium for Financial Professionals?

In addition to ACT! for Financial Professionals, we offer ACT! Premium for Financial Professionals. ACT! for Financial Professionals is ideal for individual financial advisors, small teams of up to 10 networked users³, or large disparate workforces that don't require data sharing. ACT! Premium for Financial Professionals meets the needs of larger workgroups and teams of financial advisors⁴. In addition, it offers functionality such as centralized administration, advanced security features at the user and contact level, and automatic database synchronization, backup, and maintenance which facilitates administration and support for corporate administrators or IT.

Upgrading from ACT!

ACT! for Financial Professionals, a comprehensive contact and compliance management solution, delivers all the great productivity features included with ACT!, plus additional ways to capture key financial information required for tracking critical client relationships. With ACT! for Financial Professionals you'll benefit from custom layouts as well as features and functionality designed specifically for financial services professionals so you'll have more time to focus on what's important – acceleration of prospect closings and up-sell to existing clients.

Why Choose ACT! for Financial Professionals?

On top of what's already included in ACT!, you can:

- Capture key contact, account, investment, and financial planning information in custom tabs designed for financial services professionals.
- Quickly update the primary address for a client to ensure communications are received in a timely manner.
- Assist with compliance reporting.
- Easily identify high priority clients with the Category and Tier fields for custom service.
- Customize¹ your data records to align with your business and client base.
- Bookmark a Contact for easy navigation and a reminder of any immediate associated action.
- Maintain complete information by identifying any missing fields associated with each contact.