

# ACT! | Feature Chart

## ACT! by Sage Version Comparison Chart

Compare your version to ACT! by Sage 2010, and see what new features you are missing out on!

Features	6.0	2005	2006	2007	2008	2009	2010
<b>Contact and Customer Management</b>							
Separate notes and history tabs		✓	✓	✓	✓	✓	✓
Notes and history shared between contacts		✓	✓	✓	✓	✓	✓
Unlimited secondary contacts		✓	✓	✓	✓	✓	✓
Rich text formatting including colors, bullets, graphics, and URLs		✓	✓	✓	✓	✓	✓
Attach documents to activities and history		✓	✓	✓	✓	✓	✓
Synchronize attachments		✓	✓	✓	✓	✓	✓
Groups with 15 levels of hierarchy (14 subgroups)		✓	✓	✓	✓	✓	✓
Dynamic group membership		✓	✓	✓	✓	✓	✓
Company records		✓	✓	✓	✓	✓	✓
Contacts linked to companies		✓	✓	✓	✓	✓	✓
Tree view for companies			✓	✓	✓	✓	✓
Split panel notes and history preview				✓	✓	✓	✓
Hyperlink to companies from contact list view			✓	✓	✓	✓	✓
Specify linked contact/company fields				✓	✓	✓	✓
Print any ACT! calendar template with the contact phone number	✓		✓	✓	✓	✓	✓
View all group associations	✓		✓	✓	✓	✓	✓
Duplicate checking for groups and companies					✓	✓	✓
Advanced queries for groups and companies	✓				✓	✓	✓
List edit mode <sup>1</sup>	✓				✓	✓	✓
Duplicate checking by first and last name	✓				✓	✓	✓
Related contacts						✓	✓
Streamlined, easier to learn and use layouts with new colors							✓
Related tasks							✓
Consolidated menus							✓
Big "easy" buttons							✓
Welcome page							✓
Social media integration							✓
<b>Lookups and Searching</b>							
Lookup indicator <sup>1</sup>	✓			✓	✓	✓	✓
Edit existing queries <sup>1</sup>	✓			✓	✓	✓	✓
Advanced keyword search	✓			✓	✓	✓	✓
Save lookups as groups		✓	✓	✓	✓	✓	✓
Streamlined lookup functionality						✓	✓
Instant access to search							✓

Features

6.0 2005 2006 2007 2008 2009 2010

**Calendar and Activity Management**

Rich text formatting in activity details		✓	✓	✓	✓	✓	✓
Five calendar views, including daily, weekly, and monthly		✓	✓	✓	✓	✓	✓
View global events		✓	✓	✓	✓	✓	✓
Change activity organizer	✓		✓	✓	✓	✓	✓
ACT! activity scheduling from Microsoft® Outlook® e-mails						✓	✓
Improved printing						✓	✓
Support for iCalendar							✓

**Marketing Communications**

Built-in spell checker		✓	✓	✓	✓	✓	✓
Improved mail merge		✓	✓	✓	✓	✓	✓
Validate and correct addresses during mail merge		✓	✓	✓	✓	✓	✓
ACT! e-mail find		✓	✓	✓	✓	✓	✓
Last e-mail field				✓	✓	✓	✓
En masse e-mail attaching						✓	✓
E-mail send from the notes preview pane						✓	✓
E-mail marketing, survey and Web forms; marketing results tab; and drip marketing (requires additional subscription)							✓
Mail merge in ACT! by Sage Premium for Web with Word							✓

**Sales Opportunity Management**

Opportunity list view		✓	✓	✓	✓	✓	✓
Opportunity lookups		✓	✓	✓	✓	✓	✓
Instant quotes <sup>2</sup>		✓	✓	✓	✓	✓	✓
Multiple built-in ACT! sales processes		✓	✓	✓	✓	✓	✓
Track multiple products		✓	✓	✓	✓	✓	✓
Generate and import product list		✓	✓	✓	✓	✓	✓
Opportunity date fields				✓	✓	✓	✓
Customizable opportunities							✓
New ACT! sales processes							✓
Instant quotes <sup>2</sup> in ACT! Premium for Web with Word							✓

**Dashboards and Reporting**

20+ preformatted/streamlined sales reports		✓	✓	✓	✓	✓	✓
Graphical sales pipeline with drill down to see opportunity details		✓	✓	✓	✓	✓	✓
ACT! dashboard					✓	✓	✓
ACT! Premium dashboard with team views					✓	✓	✓
Streamlined reports view							✓
New dashboards							✓
13 new reports							✓
New OLEDB provider							✓

**Note:** Shaded cells indicate an upgrade to ACT! by Sage Premium or ACT! by Sage Corporate Edition is required.

Features

6.0 2005 2006 2007 2008 2009 2010

Features	6.0	2005	2006	2007	2008	2009	2010
<b>Data Sharing and Security</b>							
Group scheduling		✓	✓	✓	✓	✓	✓
Manage resources including conference rooms and equipment		✓	✓	✓	✓	✓	✓
Five security levels		✓	✓	✓	✓	✓	✓
Mark notes and opportunities as private		✓	✓	✓	✓	✓	✓
Secure notes, history, and opportunities en masse				✓	✓	✓	✓
Field level security				✓	✓	✓	✓
Company security					✓	✓	✓
Group and company security					✓	✓	✓
<b>Personalization<sup>3</sup></b>							
Share drop-down lists across different fields		✓	✓	✓	✓	✓	✓
Field types – picture, yes/no, memo, and e-mail		✓	✓	✓	✓	✓	✓
Customizable drop-downs		✓	✓	✓	✓	✓	✓
Utilize multi-select values		✓	✓	✓	✓	✓	✓
Customizable priority, activity, and history types		✓	✓	✓	✓	✓	✓
Customizable opportunity field names and types with drop-down lists			✓	✓	✓	✓	✓
<b>Anywhere Access</b>							
ACT! Premium for Web			✓	✓	✓	✓	✓
Citrix® or terminal services support			✓	✓	✓	✓	✓
BlackBerry® <sup>4</sup>			✓	✓	✓	✓	✓
iPhone™ <sup>4</sup>							✓
<b>Integration</b>							
Export to Excel®		✓	✓	✓	✓	✓	✓
Peachtree by Sage <sup>1</sup>	✓		✓	✓	✓	✓	✓
Simply Accounting by Sage, Sage MAS 90 and Sage MAS 200, and Sage BusinessWorks <sup>1</sup>			✓	✓	✓	✓	✓
Use ACT! as Outlook address book		✓	✓	✓	✓	✓	✓
ACT! e-mail client integrated with Outlook, Outlook Express, or Lotus Notes®	✓		✓	✓	✓	✓	✓
Create ACT! contacts from Outlook e-mail <sup>1</sup>				✓	✓	✓	✓
Attach Outlook e-mail to ACT! contacts				✓	✓	✓	✓
Specify default history types and create ACT! history from Outlook				✓	✓	✓	✓
Flexible Outlook rules and ACT!						✓	✓
Support for vCard							✓

Note: Shaded cells indicate an upgrade to ACT! Premium or ACT! Corporate Edition is required.

Features

6.0 2005 2006 2007 2008 2009 2010

Administration <sup>3</sup>	6.0	2005	2006	2007	2008	2009	2010
Scalability to accommodate teams of 10+		✓	✓	✓	✓	✓	✓
Query-based sync		✓	✓	✓	✓	✓	✓
View team memberships			✓	✓	✓	✓	✓
Grant contact access en masse			✓	✓	✓	✓	✓
Lookup contacts by access			✓	✓	✓	✓	✓
Custom user permissions			✓	✓	✓	✓	✓
Automatic database sync and backup			✓	✓	✓	✓	✓
Improved administration for remote users			✓	✓	✓	✓	✓
Support for non-local machine administrators			✓	✓	✓	✓	✓
Silent install <sup>5</sup>			✓	✓	✓	✓	✓
Automatic database maintenance				✓	✓	✓	✓
Password rules				✓	✓	✓	✓
ACT! scheduler in ACT!						✓	✓
ACT! scheduler with hourly options						✓	✓
Simplified installation of a remote database						✓	✓
Streamlined sync progress bar						✓	✓
Option to exclude attachments from backups						✓	✓
Quick info for logged-in users						✓	✓
Create remote databases simultaneously							✓
Specify currency at the time of database creation							✓

Note: Shaded cells indicate an upgrade to ACT! Premium or ACT! Corporate Edition is required.

1 This feature is not available in ACT! Premium for Web.

2 Requires Microsoft Excel and Word 2002, 2003, or 2007.

3 In ACT! Premium for Web, administrative functions must be performed on the Web server.

4 Requires additional purchase.

5 Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.

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**Important Note:** Review ACT! system requirements at [www.act.com/2010systreq](http://www.act.com/2010systreq). You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. Check with your add-on product provider to determine compatibility.

**Important Note for ACT! 6.0 or Prior Customers:** Customer activation and registration are required to use ACT!. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e-mail/modem-based database synchronization, and SideACT!.

**About ACT!**

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

**About Sage CRM Solutions**

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.