ACT! by Sage Premium for Workgroups 2006

Organize your Contacts
Centralize critical contact and customer information – and stay organized

ACT! allows you to centralize contact and customer information that is captured across your entire organization. You can track and manage complete customer information including contact details, notes and history, appointments, to-do items, communications, documents and sales opportunities, so you increase productivity and stay organized.

- Populate 60+ pre-defined fields including Name, Company, Phone, Address, Web site, E-mail, Last Meeting Date, ID Status, or add your own.
- Create Company Records and view a roll up of all Notes, History and Opportunities associated with Contacts at those companies.
- Link Contacts to a Company, so when Company information is updated, it is automatically updated in each Contact record as well.
- Enter virtually unlimited date- and time-stamped Notes and History on each contact record.
- Create Notes, History, Activity and Opportunity details using Rich Text Formatting that supports colors, bullets, graphics, and URLs.
- Track collections of related contacts using the Groups or Company Record features for an at-a-glance view.
- Create up to 15 levels of Subgroups for managing information.
- Customize layouts including changing colors, adding logos and moving relevant filed displays so ACT! is unique to your business.

Stay in Touch
Manage and grow business relationships through top-notch communications

Communicating with prospects and customers and tracking the results has never been easier! ACT! provides robust mail merge and E-mailing capabilities to ensure you are always in touch.

- Track prospect and customer correspondence on the relevant contact record for a history of all communications with that contact and organization.
- Writer letters in ACT! using Microsoft® Word [1] or the ACT! built-in Word Processor which supports tables, graphics, HTML and spell checking.
- Select a group of contacts and perform a mail merge to a letter or e-mail. A history is automatically generated on each contact record.
- Create, send and track e-mail to contacts using the ACT! E-mail Client
- Send E-mail through Outlook®, Outlook Express or Lotus Notes® E-mail. [2]
- Utilize Rich Text Formatting, spell check, signatures and adding multiple attachments when E-mailing customers and prospects.

Prioritize your Work:
Prioritize your work to stay on top of appointments and tasks

Never miss a meeting or a deadline. ACT! provides features such as at-a-glance calendar views, activity alarms and the ability to roll incomplete tasks over to the next day so you never miss a beat!

- Schedule calls, meetings and to-dos quickly and easily.
- Filter calls, meetings and to-do items by priority, date range or user, even displaying totals for each activity type for a complete view of your day.
- Access daily, Weekly and Monthly calendar views.
- Utilize calendar pop-ups for an at-a-glance view of each activity.
- Use Activity Alarms to stay on top of deliverables.
- Synchronize your ACT! and Outlook® calendars to facilitate appointment scheduling with company employees not using ACT!.

Track Sales Opportunities
Forecast and track sales opportunities for an improved bottom line

ACT! enables sales professionals to track sales opportunities from initial inquiry through close using either a standard sales process or one customized to suit your organization's needs. View and report on all your open opportunities so you always know where you stand!

- Utilize the built-in Sales Process or customize it to suit your specific business needs.
- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount or Probability of Close.
- Utilize the Product List feature to easily enter repeated products or services and automatically fill in information such as name, item number, cost and price.
- View graphical Sales Pipeline and graphs for insight into sales trends.
- Generate instant quotes[1] for any opportunity without having to re-key information.
- Choose from one of the 20+ pre-formatted Sales Reports or export to Excel[2] with one click for further analysis.

Report on Activities
Access and report on information quickly for a complete view of customer interactions

Instantly access every important contact or detail using Advanced Lookups or Keyword Searches. At the end of the week or month, it's easy to report on activity or milestones with one of the many standard reports that ship with ACT!.

- Perform a lookup on most fields or use Keyword Search.
- Perform numeric lookups such as greater than or less than queries.
- Access 40 standard reports including Phone Lists, Activity Reports, Relationship History, Sales Summaries and more!
- Utilize the Report Designer to create your own custom reports and send most reports to Excel, HTML, PDF or e-mail.
- Customize priority, activity and history types for better tracking and analysis.

Information on the Go
Stay productive by taking critical information on the go!

Take your critical information with you so you can be productive, whether you are in the office or on the road!

- Synchronize your ACT! Calendar, Contact and To-Do information, Notes, and History items to Palm OS® or Pocket PC devices.
- When accessing a networked database, synchronize the database to your laptop for complete offline access when out of the office. Or, access critical contact and customer details using Citrix® or Terminal Services[1].
- Print to over 20 popular paper organizers so you always have your schedule with you.
- Print from any ACT! calendar template and the contact hone number for any scheduled call is automatically printed on the calendar.

Team Collaboration
Enable team collaboration for increased productivity

ACT! Premium for Workgroups offers advanced workgroup functionality to boost team productivity and scales to up to 50 concurrent users[1]. Group scheduling enables users to view other team members meeting availability, team membership enables individuals and managers to view individuals that make up a team and schedule meetings or assign actions to those teams, and Advanced Opportunity tracking capabilities allow for more accurate data and better reporting.

Secure Admin/Deploy
Securely administer and deploy to large workgroups and teams

ACT! Premium for Workgroups delivers a host of administration and deployment features designed specifically to meet the needs of larger teams and workgroups. With silent install you can now install, activate and register ACT! on the server and then push deployment of ACT! to different users on the network, eliminating the need to install the software on every individual machine.
Centralized administration makes it easy to grant contact access to individuals and teams, as well as mark select contacts in the database as public, private or limited access. User permissions can be customized by user.
And, automatic database synchronization and backup ensures your customer information is always up to date