ACT! Premium For Workgroups by Sage

Make contacts.
Build relationships.
Get results.

ACT! by Sage Premium for Workgroups 2006 enables individuals and organizations to instantly access complete contact and customer information, manage and prioritize activities, and track all contact-related communications to help build productive business relationships. Renowned for its ease of use and intuitive interface, ACT! offers advanced high-impact functionality and best-in-class levels of quality and performance for a low total cost of ownership.

ACT! Premium for Workgroups was specifically designed for larger workgroups, accommodating up to 50 networked users for enhanced team interaction and group functions.[1]

Key Capabilities

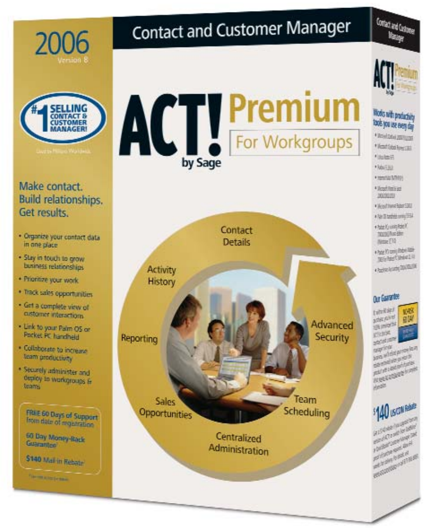
- Contact and Customer Management
- Calendar and Activity Management
- Notes and History
- Lookups and Groups
- Sales Process Automation
- Opportunity Tracking
- Customer/Prospect Communications
- Reporting
- Customization
- Integration with Core Business Applications
- Administration and Security
- Mobile and Remote Workforce Support

sage software

Your business in mind.

ACT! by Sage Premium for Workgroups 2006

#1 Selling Contact and Customer Manager



With more than 2 million individual users and 30,000 corporate customers, ACT! continues to be the market leader in contact and customer management for small businesses and workgroups or divisions of larger organizations. Specifically designed to maximize user experience and productivity, ACT! Premium for Workgroups builds on the ACT! reputation of being the preferred choice among sales professionals, while also providing management and administrators with advanced workgroup functionality in the areas of administration, deployment and security.
ACT! Premium for Workgroups is an easy-to-use solution that offers a low total cost of ownership.

Single Repository Improves Access to Information

ACT! is a single, central repository for critical contact and customer information captured across your entire organization. ACT! enables you to access detailed contact and customer information, manage team calendars and activities, capture all customer communications, track opportunities throughout the sales process, and report on overall team effectiveness.

Thorough Tracking Increases Productivity and Opportunities

ACT! Premium for Workgroups enables sales professionals to track sales opportunities from initial inquiry through close using either a standard or customized sales process. When working an opportunity, sales professionals can simply click “Follow-up” and a new activity will automatically be created with the prospect’s details, ensuring the prospect is properly managed throughout the sales process. View all sales opportunities at once or filter using selected criteria.

Opportunity fields are customizable as well for advanced flexibility. Use drop-down lists with selectable field values to ensure data consistency when creating a new opportunity. Change field names as well as field types to capture information important to your team. In addition, fields can be adapted and customized to generate a history from a field, to make a field mandatory, to disable the editing of a field, and to change the field length.

1 Actual number of users and contacts supported will vary based on hardware and size and usage of your database. The 50 user limit is based on performance tests using minimum hardware requirements and is a recommendation. You must purchase one license of ACT! per user.

Advanced Workgroup Functionality Boosts Team Productivity

Database synchronization and database backup times can be set and managed to perform automatically, ensuring critical customer information is kept up-to-date. Once set up, remote users only need to turn on their computers at the scheduled time. Group scheduling functionality includes at-a-glance user availability for everyone in the database, the ability to manage and define resources, and task bar notifications when a meeting invitation is sent.

Centralized Administration and Deployment Allows for Easy Roll-out

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[2], you can now install, activate and register ACT! on the server and then push the deployment of ACT! to different users on the network, eliminating the need to install the software on every individual machine. Administrators can set most users preferences at this time, but users can later adapt preferences to meet their needs.

Advanced Contact and User Security Provides Additional Control

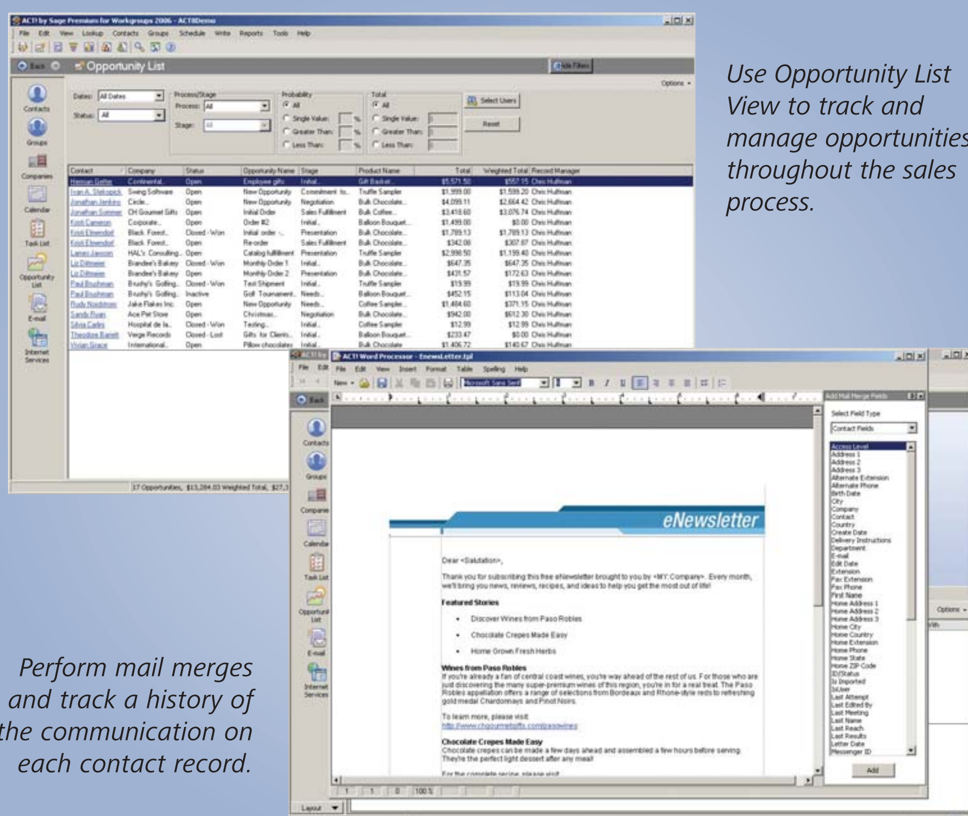
Five security levels are offered in ACT! Premium for Workgroups: Administrator, Manager, Standard, Restricted, and Browse-only rights. As many users are set up with Standard access, administrators can also control which of these users can delete data and/or export data to Excel[3] to enforce additional security. It's also easy to assign contact access to new employees or newly formed teams.

2 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.

3 Requires Microsoft Excel 2000, 2002 or 2003.

Key Benefits

- Increase productivity by centralizing all critical customer information, appointments, activities, documents, and communications.
- Improve your bottom line by automating key aspects of the sales cycle for better forecasting and opportunity tracking.
- Boost team productivity with advanced functionality designed specifically for workgroups.
- Centralize administration and deployment for easy roll-out to end users.
- Securely control database access with advanced contact and user security.



Use Opportunity List View to track and manage opportunities throughout the sales process.

Perform mail merges and track a history of the communication on each contact record.

Key Capabilities

Contact and Customer Management

- Track and manage complete customer information including contact details, notes and history, appointments and to-do items, communications, associated documents, and sales opportunities.
- Populate more than 60 pre-defined fields including Name, Company, Phone, Address, Web site, E-mail, Last Meeting Date, and Status/ID, or add your own.
- Create Company Records and view a roll-up of all notes, history and opportunities associated with contacts at that account.

Calendar and Activity Management

- Filter calls, meetings, and to-do items by priority, date range, or user, even displaying totals for each type of activity.
- Use Activity Alarms to stay on top of deliverables.

Notes and History

- View virtually unlimited date- and time-stamped Notes and History.
- Create notes, history, activity and opportunity details using Rich Text Formatting that supports colors, bullets, graphics and URLs.
- Update a note and history for one contact and have the option to update the note for all contacts that share this note.

Lookups and Groups

- Perform numeric Lookups by ranges such as greater than or less than queries.
- Create and save Advanced Queries for reusable searches.
- Track collections of related contacts using the Groups or Company Record features for an at-a-glance view.
- Create up to 15 hierarchies of Subgroups for managing information.

Sales Process Automation

- Use the built-in Sales Process or customize it to suit specific business needs.
- Generate history automatically as an opportunity moves through the sales process.

Opportunity Tracking

- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.
- Access and update opportunities from main view.
- Use built-in Product List to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price.
- Support multiple products or services for each opportunity.

Customer/Prospect Communications

- Perform mail merges using the ACT! Premium for Workgroups built-in Word Processor and track a history on each contact record.
- Track crucial e-mail communications. Select from three history types including subject line, subject line and first paragraph, and complete email text.
- Use Rich Text Formatting, spell check, signatures, and adding multiple attachments when e-mailing customers and prospects.

Reporting

- Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, Sales Summaries, and more.
- View graphical Sales Pipeline and graphs for insight into sales trends.
- Choose one of the 20 pre-formatted Sales Reports or export to Excel with one click for further analysis.[4]
- Use the Report Designer to create custom reports.

Customization

- Easily add, delete, and edit field and tabs to meet specific individual or organizational needs.
- Field types can be designated as Date, Currency, Yes/No, Expansive Memo, and Picture fields.
- Customize Activity Types, History Types, and Priorities.

Integration with Core Business Applications

- Seamlessly integrate with core business applications such as Microsoft® Office and Lotus Notes®[5].
- Integrate with back-office accounting applications such as Peachtree Accounting to eliminate duplicate data entry and ensure your organization has a complete view of all customer interactions, from quotes to orders.

Administration and Security

- Install, activate and register ACT! Premium for Workgroups on the server and then push the deployment to different users on the network.
- Assign access rights using five security levels that include Administrator, Manager, Standard, Restricted, and Browse-only rights.
- Set custom permissions for Standard role users, enabling or disabling them to delete data and/or export to Excel.
- Grant user contact access to multiple database contacts at once. Easily make contacts public, private or limit the access to specific individuals or teams.

Mobile and Remote Workforce Support

- Utilize Citrix/Terminal Services[6] support to allow multiple users from different offices to access the same ACT! database, without the need for VPN access.
- Ensure up-to-date customer information with automatic database synchronization and backup.
- Access information on the go by synchronizing key data to Palm OS® or Pocket PC handheld devices.

4 Requires Microsoft Excel 2000, 2002, or 2003.

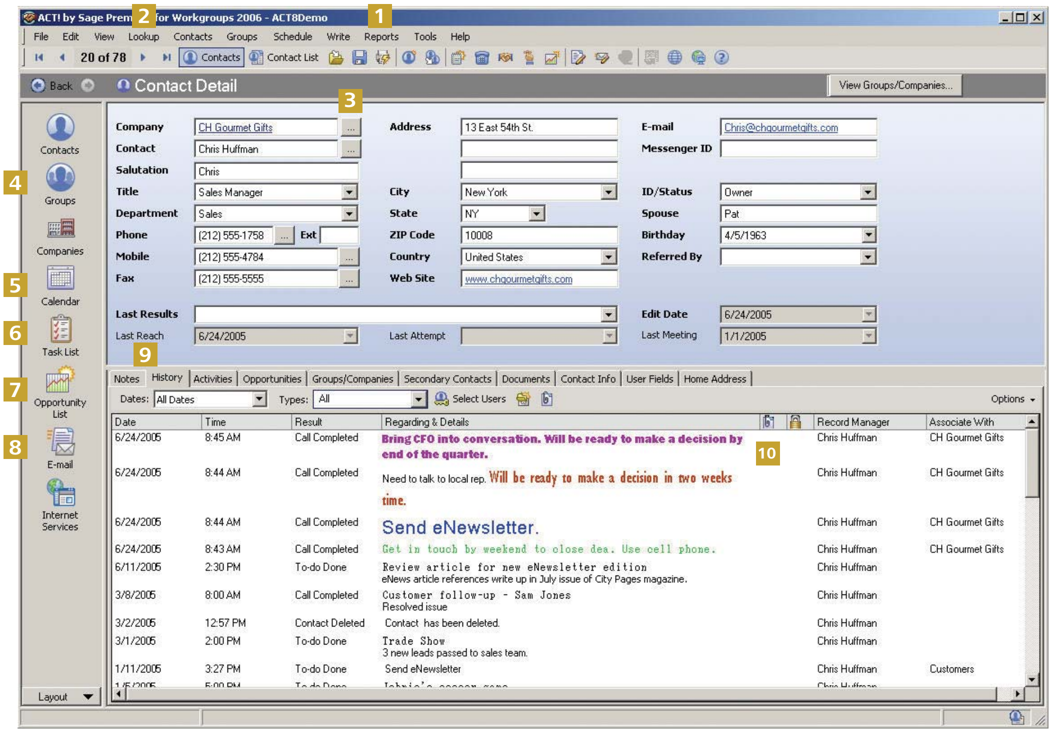
5 Requires Lotus Notes v6.5.

6 Citrix and Terminal Services require specific configurations. Citrix supported using Presentation Server V3.0 and V4.0.

ACT! Premium
For Workgroups
by Sage

For more information about ACT! Premium for Workgroups 2006:

- Call 1-888-ACT-2006
- 5 users or more?
  Call 1-888-855-5222
  for Corporate Licensing
- Contact your ACT! Certified Consultant
- Visit www.act.com



1. **Reports:** Gain critical insight into your business using up to 40 standard reports.
2. **Lookups:** Instantly access any important contact or detail with robust look-up capabilities.
3. **Companies:** Associate contacts with a company record and view a roll-up of all notes, histories and opportunities.
4. **Groups:** Track collections of related contacts using the Groups feature for an at-a-glance view.
5. **Calendar:** Get daily and work week views with pop-up details on each event as you mouse over them. Schedule activities individually or for the entire workgroup using free/busy displays.
6. **Task List:** Sort by priority to stay on top of important tasks.
7. **Opportunity List:** View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount or Probability of Close.
8. **E-mail:** Communicate to your customers by e-mail and track a history on each contact record.
9. **Notes and History Tabs:** View virtually unlimited date- and time-stamped Notes and History.
10. **Rich-text formatting:** Use Rich Text formatting, including changing colors and fonts, in Notes, History, Activity, and Opportunity details.

About ACT!

ACT! is the #1 selling contact and customer manager that enables individuals and organizations involved in selling or other contact-related functions to Make contact, Build relationships and Get results. ACT! helps you instantly access key contact and customer details, manage and prioritize activities, and track all contact-related communications so you can build productive business relationships.

The ACT! Premium platform is focused on enabling teams and workgroups to increase efficiency through access to centralized data, robust scalability, group scheduling, advanced opportunity tracking, and additional security features.

About Sage Software
(formerly Best Software)

Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.4 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.5 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at www.sagesoftware.com/moreinfo or call (866) 308-2378.

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