



New and Improved Features and Benefits Since ACT! 2004 (6.0)

Here is a list of the new and improved features that you will receive by upgrading from ACT! 2004 (6.0) to ACT! 2007 (9.0). Please notice that some features are marked Premium only and require an upgrade to ACT! Premium for Workgroups 2007 (9.0).

**Make contact.
Build relationships.
Get results.**

ACT! enables individuals and organizations to instantly access key contact and customer information, manage and prioritize activities, and track all contact-related communications so you can build productive business relationships. Renowned for its ease of use, ACT! can be tailored to individual user needs and offers robust integration with tools you use every day.

Upgrade today!

For more information about ACT!:

- Call 1-877-ACT-2007
- 5 users or more?
Call 1-888-855-5222 for Corporate Licensing
- Contact your ACT! Certified Consultant
- Visit www.act.com/upgradecenter



Upgrade today so you can:	
ORGANIZE YOUR CONTACT DATA IN ONE PLACE	
Create Company records	✓
Unlimited secondary contacts	✓
Separate Notes and History tabs	✓
Share Notes and History between Contacts	✓
Rich Text Formatting in Notes – supports colors, bullets, graphics, URLs	✓
15 hierarchies of Groups and Subgroups	✓
Dynamic membership	✓
Add attachments to Activities, Notes, and History	✓
Synchronize attachments	✓
Split panel Note Preview	✓
Specify linked Contact/Company fields ¹	✓
Update company linked fields from a Contact	✓
STAY IN TOUCH AND GROW BUSINESS RELATIONSHIPS	
Built-in spell checker	✓
Improved mail merge features	✓
Validate and correct addresses during mail merge	✓
Act! E-mail Find feature	✓
Use ACT! as Outlook® address book ²	✓
ACT! E-mail Client integrated with Lotus Notes ³	✓
Use Outlook e-mail while in ACT! ⁴	✓
Resolve E-mail address and create an ACT! History from Outlook ⁵	✓
Specify default History types ⁵	✓
Create ACT! Contact from Outlook e-mail ⁵	✓
Attach Outlook e-mail to ACT! Contacts ⁵	✓
Last E-mail field	✓
PRIORITIZE YOUR WORK	
5 Calendar views	✓
View other users' Calendars	Premium Only Feature
Rich Text Formatting in Activity details	✓
Linked Activity Series	✓
View global events	✓
Manage resources including conference rooms, equipment, etc.	Premium Only Feature
Phone numbers on printed calendars	✓
Change Activity organizer	✓
Automatic Sync with Outlook Calendar ²	Premium Only Feature
FORECAST AND TRACK SALES OPPORTUNITIES	
Opportunity List view	✓
Opportunity Lookups	✓
Forecasting tools	✓
Instant Quotes ⁷	✓
20 newly designed sales reports	✓
Interactive Pipeline report	✓
Export to Excel ^{8,7}	✓
Multiple sales processes	✓
Track multiple products	✓



"I was very impressed with the new improvements from version 6.0, especially the new company management ability and application wizards that make application modifications easier. I have been waiting for those features for a long time. The product is a lot more valuable to our organization now."

**Mike Ament
Ament Resources**



Your business in mind.

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FORECAST AND TRACK SALES OPPORTUNITIES	
Generate product list	✓
Share drop-down lists across different fields	✓
Drop-down lists in opportunity fields	Premium Only Feature
Customizable opportunity fields	Premium Only Feature
Easily view team membership	Premium Only Feature
GET A COMPLETE VIEW OF CUSTOMER INTERACTIONS	
Custom Activity types	✓
Custom History types	✓
Custom Priorities	✓
Save Lookups as Groups	✓
Utilize Multi-Select on drop-downs	✓
Field types – picture, Yes/No, memo, e-mail	✓
Add/remove Contacts to Groups	
View all Group associations	✓
Hyperlink to Companies from Contact list view	✓
Tree View for Companies	✓
Lookup Indicator	✓
Editing existing Queries	✓
Advanced Keyword Search	✓
SECURELY ADMINISTER AND DEPLOY LARGE WORKGROUPS AND TEAMS	
Easily view team membership	✓
5 security levels	✓
Query based sync	✓
Increased scalability to accommodate your workgroup or team ⁸	Premium Only Feature
Mark Notes and Opportunities as private	✓
Improved administration for remote users	✓
Improved data security	✓
Support for non-local machine administrators	✓
Automatic database backup	Premium Only Feature
Automatic database sync	Premium Only Feature
Automatic database maintenance	Premium Only Feature
Grant Contact access en masse	Premium Only Feature
Look up Contacts by Access	Premium Only Feature
Custom user permissions	Premium Only Feature
Silent install ⁹	Premium Only Feature
Password Expiration options	✓
Complexity of a password	✓
Password re-use	✓
Secure Notes, History, and Opportunities en masse	✓
Field level security ¹⁰	Premium Only Feature
Access critical information when mobile or remote	✓
Terminal Services/Citrix [®] support ¹¹	✓
INTEGRATE WITH ACCOUNTING SOFTWARE	
QuickBooks [®] Professional and QuickBooks Premier	✓

1 Not all fields can be linked and linked field types must be compatible.

2 Requires Microsoft Outlook 2000, 2002, or 2003.

3 Requires Lotus Notes v6.5.

4 Requires Microsoft Outlook 2000, 2002, or 2003. During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook.

5 Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature.

6 Requires Microsoft Outlook 2000, 2002, or 2003. ACT! must be added as an Outlook address book to use this feature. In ACT! Premium for Web, this operation must be performed on the Web server.

7 Requires Microsoft Excel and Word 2000, 2002, or 2003.

8 Sage Software offers a recommendation of up to 30 users for ACT! Premium for Workgroups and ACT! Premium for Web (EX Editions) and up to 50 users for ACT! Premium for Workgroups and ACT! Premium for Web (ST Editions). Actual scalability and number of users supported will vary based on hardware and size and usage of your database. Sage Software scalability recommendations are based on in-house performance tests using the recommended server system requirements found at: www.act.com/2007systreq. Published minimum system requirements are based on single user environments. You must purchase one license of ACT! per user.

9 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.

10 Only certain fields can be designated as read-only or no access.

11 Citrix and Terminal Services Require specific configurations. Citrix supported using Presentation Server V3.0 and V4.0.