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Never Forget
Anything or
Anybody

ACT! ™

Integrates with Sage Line 50

Integrates with Sage Line 100

ACT!
Key features and benefits

READY-TO-USE CONTACT DATABASE:
A wizard guides you through the creation of your contact database including pre-defined fields and layouts. Then begin recording calls, meetings, to-dos, e-mails, faxes, etc. Existing information in other applications can be easily imported into the database.

FAST, EASY ACCESS TO CONTACT INFORMATION: You can quickly find the information you need. Just type the first few letters of the contact's name, company, phone number, or any other field and go directly to the contact you want.

EFFECTIVE MANAGEMENT BY GROUP OR ACCOUNT: You can group contacts for more efficient management. For example, a sales manager can group leads by region, or a small business owner can group suppliers and business partners.

EFFICIENT CALENDAR AND TASK MANAGEMENT: Easily schedule contact appointments and tasks. Look at tasks in daily, weekly, and monthly views. View tasks, organised by date, type, or priority. Reminders ensure you'll never forget an important appointment, phone call, or to-do.

COMPREHENSIVE SALES PROCESS MANAGEMENT: Sales process management tools help sales professionals turn prospects into customers.

INTEGRATES WITH SAGE LINE 50 AND LINE 100: Including sales and purchase order processing, quotations, (in Line 50 only) sales history and contact details.

ACT! integrates with Sage Line 50 and Sage Line 100

Sage Business Solutions

With more than two million registered customers worldwide, Sage is the UK's leading provider of accounting and business solutions for small to medium-sized businesses, accountants in practice as well as many FTSE 100 companies.

ACT! is the number one best selling contact manager used by over 4 million people worldwide and is part of the Sage CRM solutions range.

What is Contact Management?

In today's competitive business arena, it's essential to ensure every part of your business is as effective as it can be. Contact management embraces the very core of your business - your customers and how you deal with them. Dealing with customer queries effectively, maintaining accurate contact records, implementing a proven sales process system, planning and managing communications are all part of contact management. ACT! is a must-have business solution which connects your people, processes and technology to deliver the highest levels of customer service to your customers.

ACT!
Never Forget Anything or Anybody

ACT! helps you manage all the tasks and information related to developing and maintaining business relationships. It effectively integrates the three most frequently used tools - a customer database, a calendar and a task list. It automates a variety of tasks businesses face every day, including

- Finding and contacting new prospects
- Following up with prospects and clients by telephone, fax, mail, and e-mail
- Sending product information, proposals, and quotes
- Scheduling reminders, appointments and meetings
- Scheduling multiple related activities based on business processes
- Managing customers' post sales requests for service and support
- Maintaining accurate records of all contact interactions
- Generating reports for reviewing activities and client/account status
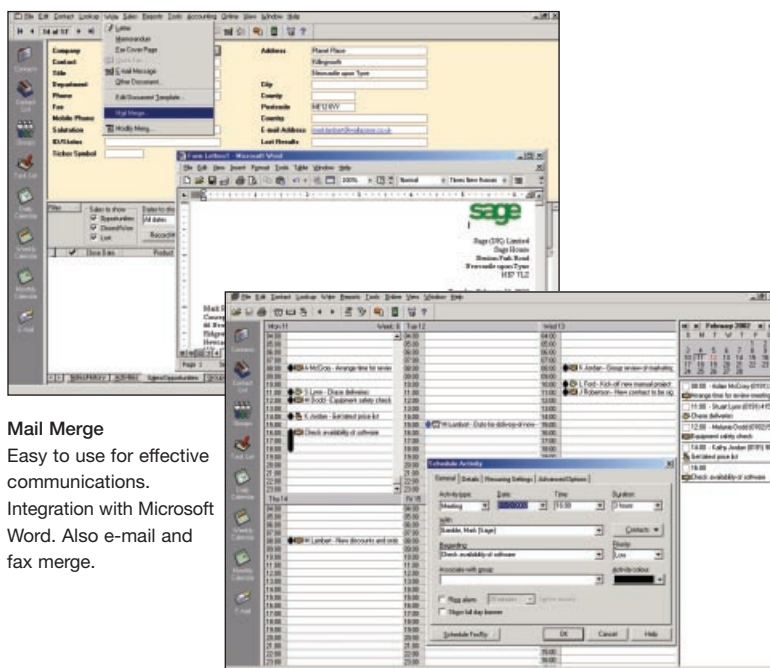
Mail Merge
Easy to use for effective communications. Integration with Microsoft Word. Also e-mail and fax merge.

Calendar
Organise your day to day activities. Plan your work effectively.

How Can ACT! Improve My Business?

Target New Prospects

You can use ACT! to easily analyse historical sales trends, understand the profile of your best customers and, using this information, plan effective marketing and sales campaigns.

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Generate Business Leads

ACT! is a comprehensive tool for marketing, you can quickly and easily use existing information or import bought-in data for direct mailshots, faxshots and e-mail communication. For example, select groups of prospects you wish to mailshot and, with the superb integration with Microsoft Word, create an effective direct mail campaign including html e-mails.

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Convert Leads to Sales

With its own built-in sales process system or by designing your own system you can track all communications with the prospect, ensure maximum service levels are maintained through the sales cycle and close business quickly and efficiently. Built-in reporting improves accuracy of sales forecasts for a single team member or the whole sales team.

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Improve Customer Relations

ACT! automatically tracks all communication with your customers including mail shots, letters, meetings, phone conversations and, when linked with Sage Line 50 or Sage Line 100, also provides essential financial information. This ensures a professional interface with your customer and lays the foundation for a long term relationship and additional sales.
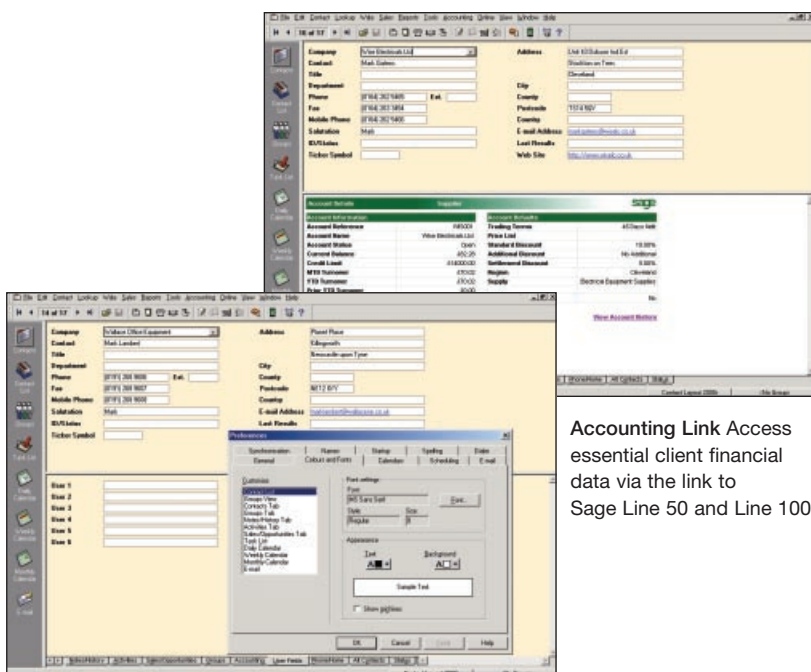
Accounting Link Access essential client financial data via the link to Sage Line 50 and Line 100

Customisation
Fully customisable. Tailor the software to suit your business.

ACT!
Key features and benefits

EASY COMMUNICATION WITH CONTACTS: Create letters, memos, html e-mails and faxes to communicate with contacts. Use Microsoft Word or the built in word processor. Then, using Mail Merge, send these communications and automatically record them in the contact's history.

COMPREHENSIVE REPORTING CAPABILITY: A number of ready-to-use reports, such as task lists, are available to help you organise your day. You can also create business and sales reports customised to meet your specific needs.

TEAM CO-ORDINATION: Information can be used over a network to co-ordinate all activities. Multi-level security protects it from unauthorised access. You can also synchronise your database with mobile users.

FULLY CUSTOMISABLE: Tailor the software to match the way you conduct business. Customise the database to hold the information you want. Customise screen layouts for the look and feel you want. Customise icons and menus for maximum efficiency. Create macros to automate repetitive tasks and save time.

ACT! AND OUTLOOK WORKING TOGETHER: Seamless integration with Microsoft Outlook is provided so you can use Outlook for e-mail and scheduling of some activities, and use ACT! as your contact manager.

FULL INTERNET INTEGRATION: Access websites within ACT! and attach any webpage to any ACT! contact.

System Requirements

Minimum: An IBM compatible computer with a Pentium 400 MHz processor; 64MB RAM; 100MB of free disk space after Windows has been installed; Internet Explorer version 6 or higher (this is included on the CD); an SVGA video card and monitor supported by Windows running at 800x600 pixels, with a minimum of 256 colours.

Recommended:

An IBM compatible computer with a Pentium II processor (1 GHz or higher); at least 128MB of RAM; at least 200 MB of free disk space after Windows has been installed; Internet Explorer version 6 or higher (this is included on the CD); an SVGA or higher resolution video card and monitor supported by Windows running at 1024x768 pixels, with a minimum of 24-bit true colour.

One of the following operating systems:

Microsoft Windows 98 (second edition),

Microsoft Windows ME,

Microsoft Windows NT V4 (with Service Pack 6),

Microsoft Windows 2000 (with Service Pack 2),

Microsoft Windows XP

Users of networked versions should use one of the following networks:

Microsoft Windows Networking
Novell Netware v4.0 or above

Works alongside and integrates with:

- Sage Line 50
- Sage Line 100
- Microsoft Outlook 2000 / 2002
- Microsoft Outlook Express 5.5 or 6.0
- Lotus Notes Mail 5.0
- Internet e-mail (SMTP/POP3)
- Microsoft Word 2000 / 2002
- WinFax PRO 9.0 or 10.0
- Microsoft TAPI-enabled telephone hardware and Caller ID support

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This publication is not intended to form any contract for computer software with The Sage Group plc or any of its subsidiaries ('Sage'). If you require a particular application or feature, the suitability of the Program should be verified.

Integrating with Sage Accounting Systems

ACT! integrates with Sage Line 50 or Sage Line 100*, offering your business an integrated front and back office system developed and supported by Sage and its reseller community.
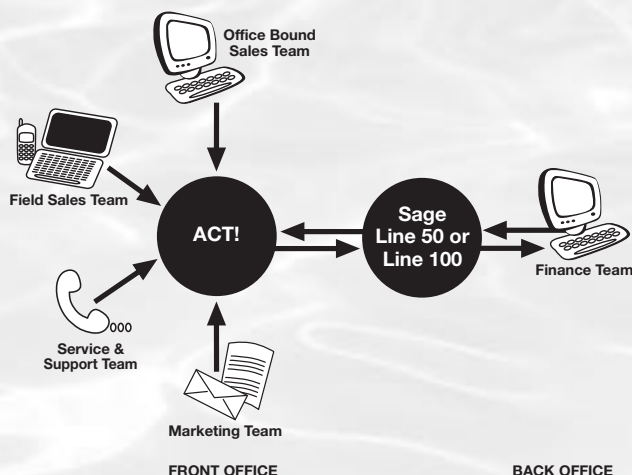

The integrated solution provides the "big picture" where all the relevant sales, marketing and financial information for any contact is available at the click of a button.

Data can be initially transferred from the existing sales ledger into the ACT! database. Then, through the accounting menu and tab, financial data can be displayed in the contact record.

Credit limit, sales to date and outstanding debt information as well as trading terms and discounts available are displayed. Transactional information such as invoice numbers, details and amounts owed and paid are also displayed.

On top of this with Sage Line 50 you can also process sales orders, purchase orders or quotations for any contact at the touch of a button**
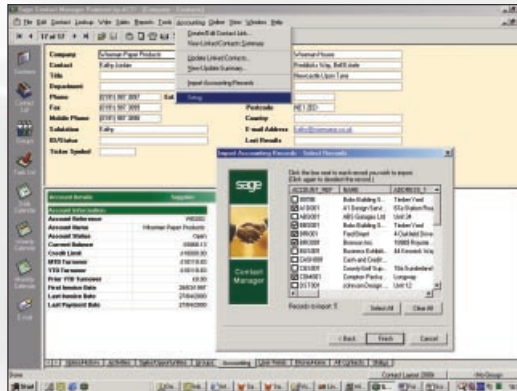
* ACT! integrates with Sage Line 50 (v8 and above) or Sage Line 100 (v7.2, v7.3 or v8.2 and above)

** Requires a Sage Line 50 Financial Controller installation on the same machine

Sage Annual Licence Plan

ACT! integrated with Sage Line 50 and Sage Line 100 software has an annual licence plan that guarantees your peace of mind and protects your investment with one annual no nonsense fee. For this you receive all upgrades at no extra cost, plus for Sage Line 50 integration you receive SageCover via our help desk or, for Sage Line 100 integration, you receive help desk support via your reseller.

For further information on any Sage CRM solution, contact your nearest ACT! or Sage reseller or call us on

0845 245 0276

Calls charged at local rate   **Visit our website at www.sage.co.uk**