

ACT!
by Sage

for Real Estate



ACT! by Sage for Real Estate 2008 (10.0) Solutions

Designed for agents and brokers in the residential real estate market, ACT! for Real Estate solutions provide industry-specific tools to help sell more homes and cultivate quality referrals. Because ACT! for Real Estate is easy to learn and easy to use, real estate professionals can quickly become more productive and offer improved service to their clients.

Find Information Quickly and Easily

Find buyer, seller, and property information quickly and easily so you can provide better service and impress clients with your knowledge about them. With ACT! for Real Estate solutions, you can perform a look-up on any field or use advanced Keyword Search to quickly find and highlight your keyword search term in notes, history, activities, or sales opportunities. You can even perform numeric look-ups by ranges (such as greater than or less than queries) for more advanced searches, and save frequent queries for searches at later dates. Next time you get a message with only partial information, just perform a search in ACT! for Real Estate, and you'll instantly get the full information you need to return the call.

Stay on Top of Daily Responsibilities

Stay on top of daily responsibilities, including appointments and tasks – even associate MLS numbers to each activity, so important assignments don't slip through the cracks. Schedule calls, meetings, and to-dos in ACT! for Real Estate solutions. For better tracking and analysis of time spent, use custom activities designed for real estate, including more than 20 Activity Types such as Prospecting and Marketing, Showing Properties, Listing Properties, and Closing Tasks. Set Activity Alarms to remind you of key deliverables – activities not completed will roll over to the next day.

For tasks with multiple steps, like a new listing or a closing, you can set up an Activity Series using one of 10 real estate-specific Activity Series in ACT! for Real Estate. Because activities are linked in an Activity Series, a due date change to one will realign all subsequent activities. With ACT! for Real Estate, you can track every activity related to your buyers and sellers, ensuring that you meet your deadlines and see all tasks through to completion.

Get Up and Running Fast

Because ACT! for Real Estate solutions are easy to learn and easy to use, you'll be up and running quickly, ensuring you accelerate your time to productivity. ACT! provides you with complete information on one screen, a tabbed interface, lots of right-click and one-click functionality, and robust look-up capabilities. And, you'll have plenty of help at your fingertips with Feature Tours, online help, documentation, Installation and Getting Started wizards, and much more. Additionally, you'll receive 30 days of Getting Started Support¹ so when you do need to talk live with product specialists, you can call at no additional charge to you.

BECOME MORE PRODUCTIVE TO SELL MORE REAL ESTATE

ACT! by Sage for Real Estate solutions equip residential real estate professionals with the tools needed to be more successful in a competitive market. ACT! for Real Estate solutions enable you to organize buyer, seller, and property information in one place; manage daily responsibilities from showings to closings; and communicate effectively using custom flyers and letter templates.

KEY BENEFITS

Centralize critical buyer, seller, and property information

Stay on top of daily responsibilities

Communicate effectively with buyers and sellers

Manage property listings from initial inquiry through close

Gain insight into activities performed and property sales

Access buyer, seller, and property information on-the-go

Accommodate larger teams of networked users²

WHICH ACT! VERSION IS RIGHT FOR YOU?

In addition to ACT! for Real Estate 2008, ACT! by Sage Premium for Real Estate 2008 (10.0) is also available. While ACT! for Real Estate is ideal for individual real estate professionals, small teams of up to 10 networked users,⁵ or large workforces that don't require data sharing, ACT! Premium for Real Estate meets the needs of larger workgroups and teams of real estate professionals.² ACT! Premium for Real Estate offers team functionality, including group scheduling and automatic Outlook® calendar sync; automatic database sync, backup, and maintenance; advanced opportunity tracking and customization capabilities; and team reporting with insight into team performance. Individuals can also benefit from its advanced functionality.

CUSTOM REAL ESTATE FEATURES

- Use a custom layout with fields and tabs designed for residential real estate professionals.
- Access your MLS homepage³ quickly and easily from within ACT! for Real Estate.
- Automate and expedite your processes using Activity Series for real estate.
- Facilitate your daily contact communications with flyers and letter templates designed for real estate.
- Run custom reports to track and measure real estate-specific activities.
- Track and analyze how you spend your time using real estate-specific activity types.
- Get key, graphical representations of key activity and sales opportunity information with ACT! for Real Estate interactive Dashboards.

Centralize Critical Buyer, Seller, and Property Information

Centralize critical buyer, seller, and property information for easy organization and referencing instead of relying on written Post-it® notes, multiple Excel® spreadsheets, or your memory. With ACT! for Real Estate solutions, you'll always have detailed, organized contact information at your fingertips, using the custom layout designed specifically for residential real estate professionals. Keep detailed notes on listed properties; track real estate-specific appointments and to-dos; attach critical documents like inspection reports, house photos, and MLS listings; and manage property listings with custom sales processes – all tied to a Contact Record that provides you with a comprehensive view of your dealings with each contact.

Even launch your MLS home page³ from within ACT! for Real Estate for quick and easy access to searches performed, property listings sent, and more. With ACT! for Real Estate, you'll impress your contacts with knowledge about their unique buying and selling needs to ultimately obtain positive referrals and generate repeat business.

Communicate Effectively with Buyers and Sellers

Communicate effectively with buyers and sellers for more professional and consistent contact and easy referencing of past communications. ACT! for Real Estate solutions offer preformatted real estate-specific templates for a variety of communications, including e-mail, flyers and letters – all of which can be easily customized. These custom templates were developed by a respected real estate professional specializing in real estate communications to improve your interactions with buyers and sellers. If you'd prefer to write your own communications, use Word or the built-in ACT! Word Processor.

When sending e-mail communications to your buyers and sellers, you can use ACT! integrated directly with Microsoft® Outlook® e-mail,⁴ or use the ACT! E-mail Client integrated with Outlook Express or Lotus Notes®. However you prefer, when you send e-mail to your contacts, a history is created on the associated Contact Records for quick and easy referencing of correspondence. Additionally, you can perform a Mail Merge to automate communications, allowing you to reach out to multiple contacts with little effort. And, you'll have a quick way to reference the last time you communicated using the Last Communication fields to ensure you consistently communicate and remain visible to your contacts.

Integrate With Everyday Applications

Integrate ACT! for Real Estate solutions with everyday applications so you can work the way you want with applications you already know. Integrate with Microsoft Office applications like Outlook for easier e-mail communications, Word to write letters, and Excel for importing or exporting contact and sales opportunity lists for further analysis or sharing with non-ACT! users. With numerous integration options available in ACT! for Real Estate, you can work the way you're accustomed without having to adapt to all-new applications, reducing your learning curve.

Key Capabilities

Centralize critical buyer, seller, and property information

- Track complete buyer, seller, and property information, including contact and property details, notes and history, appointments and to-dos, documents, and property listings with a custom layout designed for residential real estate professionals.
- Utilize the ID/Status field to signify if a contact is a prospect, buyer, seller, home inspector, mortgage broker, title agent, or competitor, and the Referred By field to capture your lead sources such as referral, sign, newsletter, marketing campaign, or Web lead.
- Attach critical documents such as inspection reports, house photos, MLS listings, and more to the Contact Record – even if you are working in Word and Excel.
- Use the Groups feature to easily communicate and schedule with related contacts. Groups can also be used to track properties and buyers or sellers associated with those properties.
- Perform a quick look-up on most fields or use Advanced Keyword Search to quickly locate a Contact Record from only a first name or partial phone number. Even perform numeric lookups such as greater than or less than queries and easily edit a row or rows within the query to better suit your search needs.
- Launch your MLS home page³ from within ACT! for Real Estate for quick and easy access to searches performed, listings sent to the contact, and more.

Stay on top of daily responsibilities

- Schedule calls, meetings, and to-dos quickly and easily using one of more than 20 activities customized for Real Estate, including Prospecting and Marketing, Showing Properties, Listing Properties, Closing Tasks, and more, for better tracking and analysis of time spent.
- Use Group Scheduling for at-a-glance user availability for everyone in the database, to manage and define resources, and to receive task bar notifications when a meeting invitation is sent. (Premium only)
- Synchronize your ACT! and Outlook calendars to facilitate appointment scheduling if you work in Outlook.
- Synchronize ACT! Premium for Real Estate and Outlook calendars automatically. (Premium only)
- Filter activities by priority, date range, or user using the Task List.
- Use Activity Alarms to stay on top of listing and closing activities, marketing tasks, appointments, and more. Incomplete activities roll over to the next day.
- Automate and expedite your processes using 10 Custom Activity Series for Real Estate. Activity Series allow you to schedule multiple activities at once for a project. Plus, activities are linked so if a date changes in one, it pushes dates out for subsequent activities.
- Gauge your schedule and pending activities using the ACT! for Real Estate Activity Dashboard.

Communicate effectively with buyers and sellers

- Use preformatted templates, including 30 letter templates customized for real estate, such as Letters to Buyers, FSBOS, Lead Follow-up, Open House Follow-up, Referral Letters, Letters to Sellers, and PR Campaigns for the Holidays.
- Write letters in ACT! for Real Estate using Word or the ACT! built-in Word Processor which supports tables, graphics, HTML, and spell checking. Print labels as well and your mailing is complete.
- When e-mailing buyers and sellers, take advantage of Rich Text Formatting, spell check, signatures, and the ability to add multiple attachments such as MLS listings.
- Create, send, and track e-mail to/from contacts using direct integration with Outlook⁴ or using the ACT! E-mail Client integrated with Outlook Express or Lotus Notes. Either way, a history is automatically generated on each Contact Record.
- Select a contact or group of contacts and perform a Mail Merge to a letter or e-mail.
- Quickly identify your last communication with a contact using the Last Results fields, including Last Reach, Last Attempt, Last Meeting, Last Letter, and Last E-mail fields.

Manage property listings from initial inquiry through close

- Track leads using the built-in custom ACT! for Real Estate sales processes including Property Closing, Property Purchase, and Property Sales processes. Or, customize processes to suit your needs.
- Easily import leads from text and .csv files into ACT! for Real Estate.
- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.
- Group leads based on list source, buyer or seller status, and more. Easily send an individually personalized communication to a Group using Mail Merge.
- Use Groups to view closing parties (Attorney, Title Company, Buyer, Seller) that are involved with the closing.
- View your property pipeline, top listings, and closed sales using the ACT! for Real Estate Opportunity Dashboard.
- Choose from 20+ preformatted Sales Reports or export to Excel with one click for further analysis using built-in, customizable pivot tables.

Gain insight into activities performed and property sales

- Run one of 40 standard reports, 20 focused on sales opportunities, or one of six custom real estate reports including Buyer Completed Activities (Summary and Detailed), Seller Completed Activities (Summary and Detailed), Activities by Type, and Activities by Contact, so you can make educated business decisions.
- View, manage, and report on activities by team member, providing managers insight into activities initiated and completed by the members of their team. (Premium only)
- Create your own reports using the Report Designer to suit your exact needs.
- Send most reports to Excel, HTML, PDF, or e-mail for easy analysis and distribution.
- Get a pulse on your real estate business in a single view with comprehensive, graphical representations of key activity and property listing information with ACT! for Real Estate Dashboards.
- Tailor ACT! to suit your real estate business by customizing Priority, Activity, and History types, allowing for better tracking and analysis.
- Customize layouts, including changing colors, adding logos, and moving relevant field displays for greater visibility.

Access buyer, seller, and property information on-the-go

- Synchronize your ACT! for Real Estate Contact, Calendar, and Activity information to mobile devices including Palm OS[®] and Pocket PC via free links, or BlackBerry[®].⁶
- Print to over 20 templates designed for popular paper organizers so you always have your schedule with you.
- Print from any ACT! for Real Estate calendar template and the contact phone number for any scheduled call is automatically printed on the calendar.
- Access critical buyer and seller details through Citrix[®] or Terminal Services⁷ when you only have Web access so you can be productive at all times.

Accommodate larger teams of networked users²

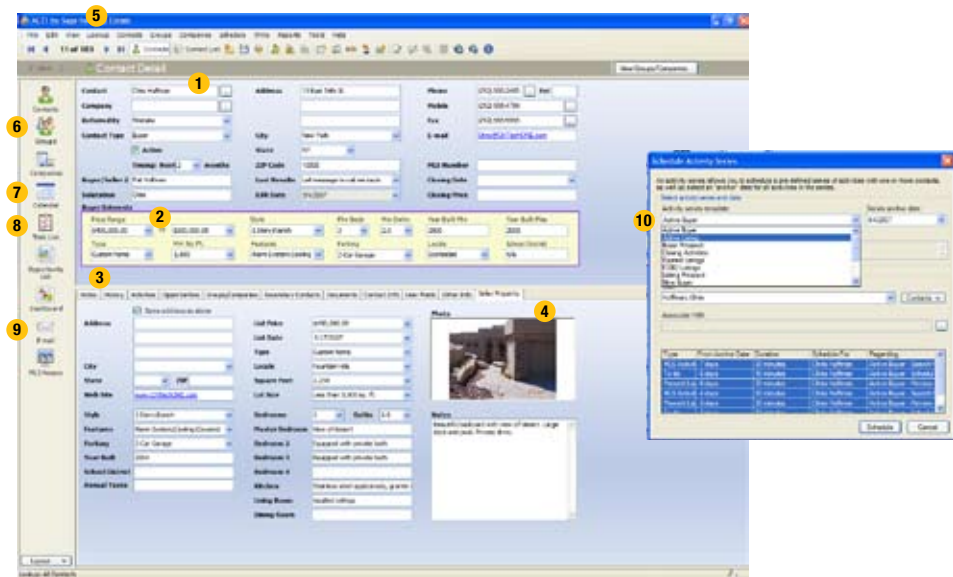
- Assign up to five security levels, including Manager and Restricted, to all team members, to allow different access to data and features depending on user levels.
- Maintain database security with custom user permissions per team member, enabling or disabling them from deleting and/or exporting to Excel. (Premium only)
- Ensure up-to-date buyer, seller, and property information with automatic database synchronization, backup, and maintenance. (Premium only)

Important Note for all Customers:

Sage Software recommends you carefully review all ACT! system requirements at www.act.com/2008systemreq to ensure your system meets these requirements. Compatibility with ACT! Solutions: ACT! for Real Estate 2008 (10.0) cannot be used in conjunction with ACT! Premium for Real Estate 2008 (10.0), and neither can be used in conjunction with ACT! 2008 (10.0), ACT! Premium 2008 (10.0), or ACT! Premium for Web 2008 (10.0). Regarding ACT! for Palm OS[®]: ACT! for Real Estate 2008 (10.0) solutions are not compatible with ACT! for Palm OS 2.0. Regarding ACT! Link for use with QuickBooks[®]: ACT! Link for use with QuickBooks 3.x is not compatible with Windows[®] Vista[™]. Regarding ACT! Add-on Solutions: Certain ACT! add-on solutions may not be compatible with ACT! for Real Estate 2008 solutions. Please visit www.act.com or check with your add-on product provider to determine compatibility.

"None of the contact databases offered for Real Estate had the features ACT! for Real Estate has. Thank you, Sage Software, for making our jobs easier."

Mary Macy,
Top Agents Atlanta Metro



1. **Contact Detail** – Capture key contact details, including Phone, E-mail, Referred By, Contact Type, and MLS.
2. **Buyer Interests** – Keep buyer interests in mind with fields that include drop-downs for price range, size, locale, etc.
3. **Notes and History** – View virtually unlimited date- and time-stamped Notes and History.
4. **Seller Property** – Include details like style, room specs, features, lot size, school district, and annual taxes.
5. **Lookups** – Instantly access any important customer or detail with robust look-up capabilities.
6. **Groups** – Track related Contacts using the Groups feature.
7. **Calendar** – Schedule up to 20 real estate-specific activities to automate and expedite processes.
8. **Task List** – Sort by priority to stay on top of vital tasks; use Activity Alarms for must-do tasks and appointments.
9. **E-mail** – Communicate with your customers by e-mail and track that history on each Contact record.
10. **Activity Series** – Utilize 10 Activity Series for real estate.

For more information about ACT! for Real Estate:

- Call 1-866-873-2006
- Contact your ACT! Certified Consultant
- Visit www.act.com

- 1 Free support starts from the date of registration. Support representatives reserve the right to limit calls to one hour or one incident. Support is not available for users who do not meet the minimum system requirements.
- 2 Published minimum system requirements are based on single user environments. Actual scalability and number of networked 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/2008systreq. You must purchase one license of ACT! per user.
- 3 Use of this feature requires an Internet connection, Internet Explorer® 6.0 or 7.0, and an online MLS account.
- 4 During setup, users must select if they want to access Outlook e-mail through the ACT! E-mail client or direct integration with Outlook. ACT! must be added as an Outlook address book to use this feature.
- 5 You must purchase one license of ACT! per user.
- 6 Requires additional purchase.
- 7 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0, 4.0, and 4.5.

About ACT!

The #1 selling contact and customer manager for 20 years, ACT! by Sage enables individuals and teams involved in selling or other contact-driven roles to improve productivity by helping them organize contact information, manage daily responsibilities, and communicate more effectively. With contact details at their fingertips, they can focus on what's important to their business - building stronger customer relationships. ACT! is easy to learn and use, customizable, and affordable for small businesses. With more than 2.7 million individual users and 41,000 corporate customers in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.



End-to-end solutions. Expert advice. Premium support. That's Sage 360®.

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

