



What's New?

Check out the new and improved features available to you. Then call 1-866-903-0006, contact your ACT! Certified Consultant, or visit www.act.com to upgrade to ACT! by Sage 2009 (11.0) today!

	ACT! 6.0	ACT! 2005	ACT! 2006	ACT! 2007	ACT! 2008	ACT! 2009
Contact and Customer Management						
Separate Notes and History tabs		✓	✓	✓	✓	✓
Notes and History shared between Contacts		✓	✓	✓	✓	✓
Unlimited Secondary Contacts		✓	✓	✓	✓	✓
Rich text formatting including colors, bullets, graphics, URLs		✓	✓	✓	✓	✓
Attach documents to Activities and History		✓	✓	✓	✓	✓
Synchronize attachments		✓	✓	✓	✓	✓
Groups with 15 levels of hierarchy (14 Subgroups)		✓	✓	✓	✓	✓
Dynamic Membership		✓	✓	✓	✓	✓
Split Panel Notes Preview				✓	✓	✓
Hyperlink to Companies from Contact List view			✓	✓	✓	✓
Specify Linked Contact/Company fields ¹				✓	✓	✓
Print any ACT! calendar template with the contact phone number	✓		✓	✓	✓	✓
View all group associations	✓		✓	✓	✓	✓
Duplicate checking for Groups and Companies					✓	✓
Advanced Queries for Groups and Companies	✓				✓	✓
List Edit Mode	✓				✓	✓
Duplicate checking by first and last name	✓				✓	✓
Company Management						
Company Records		✓	✓	✓	✓	✓
Contacts linked to Companies		✓	✓	✓	✓	✓
Tree view for Companies			✓	✓	✓	✓
Intuitive Interface						
Streamlined Setup Assistant						✓
Lookups and Searching						
Lookup Indicator ²	✓			✓	✓	✓
Edit existing Queries ²	✓			✓	✓	✓
Advanced Keyword Search ²	✓			✓	✓	✓
Save Lookups as Groups		✓	✓	✓	✓	✓
Easy and powerful Lookups						✓
Fast access to previous contact Lookups						✓
Sales Opportunity Management						
Opportunity list view		✓	✓	✓	✓	✓
Opportunity Lookups		✓	✓	✓	✓	✓
Instant Quotes ^{3,2}		✓	✓	✓	✓	✓
Multiple built-in ACT! sales processes		✓	✓	✓	✓	✓
Track multiple products		✓	✓	✓	✓	✓
Generate and import product list ⁴		✓	✓	✓	✓	✓
Opportunity date fields				✓	✓	✓
Calendar and Activity Management						
Rich text formatting in Activity details		✓	✓	✓	✓	✓
Five calendar views including daily, weekly, and monthly		✓	✓	✓	✓	✓
View global events		✓	✓	✓	✓	✓
Change activity organizer	✓		✓	✓	✓	✓
Automatic Outlook calendar sync ²				✓	✓	✓
ACT! activity scheduling from Outlook e-mails						✓
One-click calendar copy						✓
Calendar printing improvements						✓
Calendar visibility improvements						✓

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Prospect and Customer Communications						
Built-in spell checker		✓	✓	✓	✓	✓
Improved Mail Merge		✓	✓	✓	✓	✓
Validate and correct addresses during Mail Merge		✓	✓	✓	✓	✓
ACT! E-mail Find		✓	✓	✓	✓	✓
Use ACT! as Outlook address book		✓	✓	✓	✓	✓
ACT! E-mail Client integrated with Outlook®, Outlook Express, or Lotus Notes®	✓		✓	✓	✓	✓
Create ACT! Contacts from Outlook e-mail ⁵				✓	✓	✓
Attach Outlook e-mail to ACT! Contacts ⁵				✓	✓	✓
Specify default history types and create ACT! history from Outlook ⁵				✓	✓	✓
Use flexible Outlook Rules in ACT!						✓
Last E-mail field				✓	✓	✓
En Masse E-mail attaching						✓
E-mail send from the Notes Preview Pane						✓
Dashboards and Reporting						
ACT! Dashboard					✓	✓
ACT! Premium Dashboard with team views					✓	✓
20+ preformatted/streamlined sales reports		✓	✓	✓	✓	✓
Graphical sales pipeline with drill down to see opportunity details		✓	✓	✓	✓	✓
Data Sharing and Security						
Group scheduling		✓	✓	✓	✓	✓
Manage resources including conference rooms and equipment		✓	✓	✓	✓	✓
Five security levels		✓	✓	✓	✓	✓
Mark Notes and Opportunities as private		✓	✓	✓	✓	✓
Secure Notes, History, and Opportunities en masse				✓	✓	✓
Field level security				✓	✓	✓
Company security ⁶					✓	✓
Group and Company security ⁷					✓	✓
Customization						
Share drop-down lists across different fields		✓	✓	✓	✓	✓
Field types – Picture, Yes/No, Memo, E-mail		✓	✓	✓	✓	✓
Customizable drop-downs; utilize multi-select values ⁴		✓	✓	✓	✓	✓
Customizable Priority, Activity, and History types ⁴		✓	✓	✓	✓	✓
Customizable opportunity field names and types with drop-down lists ⁴			✓	✓	✓	✓
Administration						
Scalability to accommodate larger teams ⁸		✓	✓	✓	✓	✓
View team memberships ⁴			✓	✓	✓	✓
Grant Contact access en masse ⁴			✓	✓	✓	✓
Lookup Contacts by access			✓	✓	✓	✓
Custom user permissions			✓	✓	✓	✓
Automatic database sync and backup ⁴			✓	✓	✓	✓
Automatic database maintenance ⁴				✓	✓	✓
Password rules				✓	✓	✓
Query-based sync		✓	✓	✓	✓	✓
Improved administration for remote users ⁴			✓	✓	✓	✓
Support for Non-Local Machine Administrators ^{9,4}			✓	✓	✓	✓
Silent Install ¹⁰			✓	✓	✓	✓
ACT! Scheduler in ACT!						✓
ACT! Scheduler with hourly options ¹¹						✓
Simplified installation of a remote database						✓
Streamlined sync progress bar						✓
Option to exclude attachments from backups ¹¹						✓
Quick info for logged-in users						✓

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Mobile and Remote Access						
BlackBerry® ¹²			✓	✓	✓	✓
Citrix® or Terminal Services ¹³ support			✓	✓	✓	✓
Microsoft® Office Integration						
Tighter Outlook integration						✓
Export to Excel®		✓	✓	✓	✓	✓
Accounting Integration²						
Peachtree by Sage and QuickBooks® Professional/ Premier	✓		✓	✓	✓	✓
Simply Accounting by Sage, Sage MAS 90 and Sage MAS 200, and Sage BusinessWorks			✓	✓	✓	✓

Note: Shaded cells indicate that an upgrade to ACT! by Sage Premium Solutions 2009 (11.0) is required to inherit that new and improved feature listed.

Important Note: Sage Software recommends you review ACT! 2009 Solutions system requirements at www.act.com/2009sysreq to ensure you meet these requirements. **Compatibility:** ACT! cannot be used in conjunction with ACT! Premium Solutions. ACT! Premium Solutions are only compatible with their respective same editions. ACT! Premium for Web is not available on a standalone basis. ACT! Premium for Web is only available with ACT! Premium-Corporate Edition. **Add-on Solutions:** Visit www.act.com or check with your add-on product provider to determine compatibility.

Important Note for Customers Using ACT! 2004 (6.0) or Prior: Customer activation and registration are required to use ACT! Solutions. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e-mail/modem-based database synchronization, and SideACT!.

- 1 Not all fields can be linked and linked field types must be compatible.
- 2 This feature is not available in ACT! Premium for Web.
- 3 Requires Microsoft Excel and Word 2002, 2003, and 2007.
- 4 In ACT! Premium for Web, this operation must be performed on the Web server.
- 5 ACT! must be added as an Outlook address book to use this feature.
- 6 In order to utilize Company Security, you must add the Company Access control to your layout.
- 7 Limited access Group and Company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 8 Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at: www.act.com/2009sysreq are based on single user environments. You must purchase one license of ACT! per user.
- 9 Must be a member of the Microsoft Windows administrator's group to perform the following: Install, register, and activate ACT!. Features such as ACT! Scheduler (Premium product only), sharing database with other users, and changes to handheld sync settings must be performed by a Windows administrator.
- 10 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.
- 11 In ACT! Premium for Web, administrative functions must be performed on the Web server.
- 12 Requires additional purchase.
- 13 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.

About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 43,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an “anywhere” workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.



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.

Order today!

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- Contact your ACT! Certified Consultant
- Visit www.act.com/upgrade/2009

