POWER TO RUN YOUR BUSINESS

ACT! Premium for Workgroups 2007

Powerful contact and customer management for your business

Make contact. Build relationships. Get results.

ACT! Premium for Workgroups enables small to mid-size businesses and teams of selling professionals to instantly access key contact and customer information, manage and prioritize activities, and track all contact-related communications to increase sales team productivity.

Scalable to accommodate larger workgroups or teams,[1] ACT! Premium for Workgroups delivers all the features and functionality of ACT! while providing your organization with the centralized administration, advanced contact and user security and deployment options required to drive your business.

Key Benefits:

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

1. 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.

2. Requires Microsoft Outlook 2000, 2002, or 2003.

No.1 Selling Contact and Customer Manager

With more than 2.5 million individual users and 35,000 corporate customers, ACT! by Sage is the No.1 selling contact and customer manager that helps corporate workgroups and sales teams make contact, build relationships, and get results. Renowned for high end-user adoption, ACT! Premium for Workgroups offers tools to increase your sales team productivity while providing your organisation with scalability to accommodate your workgroup or team,[1] centralised administration, advanced contact, user, and field-level security, advanced opportunity tracking, and additional workgroup functionality required to drive your business. ACT! can be tailored to specific business requirements and offers robust integration with the tools your team uses every day, such as Microsoft® Office, Lotus Notes®, accounting products, and handheld devices.

Centralised Customer Data 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 Opportunity Tracking Provides Additional Insight

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. Sales professionals and management will always know where they stand. They can view all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.

Opportunity fields are customisable as well so ACT! can be tailored to suit your business needs. Change field names as well as field types in order to capture the most accurate information. Administrators can change the field type to make it currency, decimal, or numeric. Drop-down fields are available in User Fields. You can even make them multi-select values, to ensure data consistency and improve reporting accuracy. 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.

Advanced Workgroup Functionality Boosts Team Productivity

Increase team efficiency with advanced scheduling and calendaring functions. With ACT! Premium for Workgroups you can easily schedule meetings for your workgroup or team with group scheduling. It 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. Users can also automate when Outlook® calendar synchronisation occurs, even when the database is not open.[2] Calendars will remain in sync, so workgroups always have a pulse on important meetings and availability of colleagues.

Should ACT! Premium for Web 2007 be included in your deployment?

In conjunction with Workgroups, Web is ideal for:

Adding additional users to your deployment quickly and easily.

Providing remote or travelling users with access to a centralized ACT! database via a Web browser, without the requirement of synchronisation.

Easy roll-out of software and updates to end users with no need for remote users to bring their computer into the main office.

Delivering the power of ACT! to employees with lower performing PCs since the individual user PC requirements are significantly lower.[5]

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

4. 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.

5. ACT! Premium for Web server must meet minimum system requirements. Please review all system requirements for ACT! Premium for Web.

6. Requires Microsoft Outlook 2000, 2002, or 2003.

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

8. Requires Microsoft Outlook 2000, 2002, or 2003. Requires Outlook Express 5.5 or 6.0. Requires Lotus Notes 6.5. ACT! must be added as an Outlook address book to use this feature.

9. Requires Microsoft Excel 2000, 2002, or 2003.

10. Requires Microsoft Outlook 2000, 2002, 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.

11. 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.

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

13. 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.

14. Requires additional license purchase.

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

Advanced Security Provides Additional Data Control

ACT! Premium for Workgroups offers additional features for managing security by user, by contact, and by field. You can assign up to five security levels including Manager and Restricted to all users, to allow different access to data and features depending on user levels. Contact data can be marked as public, private, or you can limit the access to specific users or teams. With field level security, fields related to personal or financial information such as addresses or credit cards can be restricted by users/teams and defined as read-only or no access.[3]

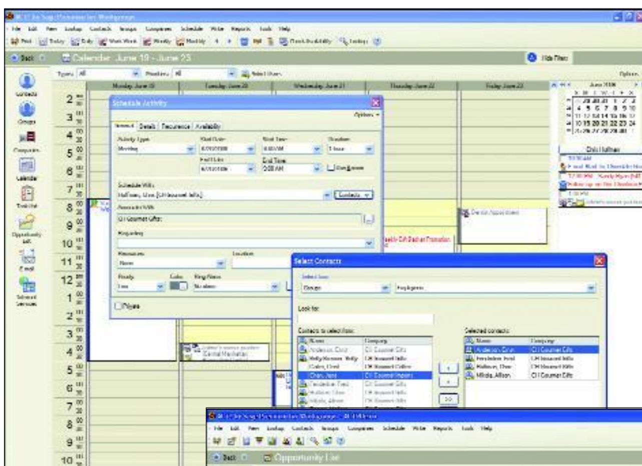
Centralised Administration Allows for Quick User Set-up

ACT! Premium for Workgroups delivers a host of administrative functions designed specifically to meet the needs of larger organizations. Silent install[4] is available for organizations to install, activate, and register ACT! Premium for Workgroups 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. When setting users up in the database, administrators can utilize the teams function to group users and easily grant contact access by team. Once users are set up, from a Contact List view select multiple contacts and specify which users/teams have access to those contacts.

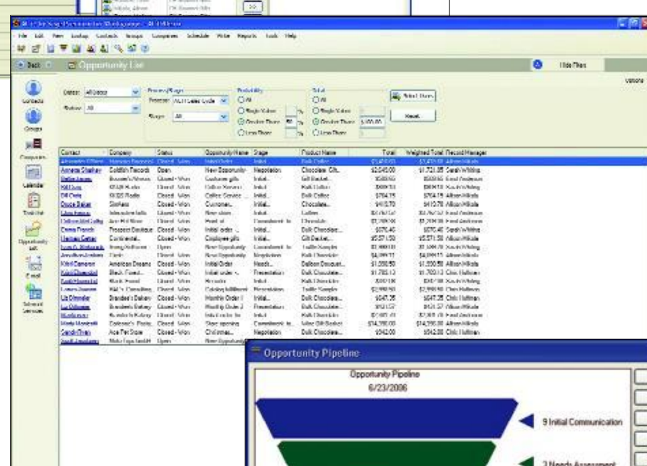
For ongoing database health, utilise automatic database synchronization, backup, and maintenance to ensure critical customer information is kept up to date. Once set up, the only remote user involvement required is their computer must be turned on at the scheduled time.

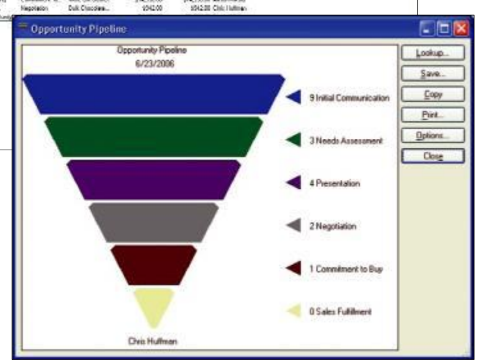
Flexible Deployment and Remote Access Options

ACT! Premium for Workgroups works with ACT! Premium for Web for use in a standalone or mixed use environment. Equip your organisation with a solution that matches how each individual works, and still enjoy the benefits of centralised customer data.



Use Group Scheduling for at-a-glance availability of your team, to manage and define resources, and to receive task bar notifications when a meting invitation is sent.





View the graphical Sales Pipeline and drill down to see opportunity details, or choose from 20+ pre-formatted Sales Reports.

Key Capabilities

Contact and Customer Management

Track complete customer data: contact details, notes and history, appointments and to-do items, documents, and new opportunities.

Populate 60+ pre-defined fields including Name, Company, Phone, Address, Web site, E-mail, and ID/Status, or add your own.

Create Company Records and view a roll-up of notes, history, and opportunities tied to contacts at those companies.

Attach documents directly into Activities, History, or Documents tabs so it's easy locate presentations, proposals and quotes.

Calendar and Activity Management

Schedule calls, meetings, and to-dos quickly and easily.

Filter calls, meetings, and to-do items by priority, date or user.

Access Daily, Weekly, and Monthly Calendar views.

Schedule recurring activities at once for repeat tasks. Activities are linked to one another so a date change in one can push out other activities.

Calendar pop-ups make it easy to view activity details instantly by mousing over any activity for an "at-a-glance" view.

Print over 20 templates designed for popular paper organisers so you always have your schedule with you.

Use Activity Alarms to stay on top of deliverables.

Synchronise ACT! and Outlook® calendars automatically to facilitate appointment scheduling with company employees not using ACT![6]

Notes and History Tracking

Enter virtually unlimited date- and time-stamped notes and history.

Create notes, history, activity, and opportunity details using Rich Text Formatting that supports colours, bullets, graphics, and URLs.

Track customer correspondence on the relevant Contact Record for a history of all communications with that contact and organisation.

Lookups and Groups

Perform a lookup on most fields or use Advanced Keyword Search and ACT! will highlight the keyword in particular note, history, activity, or opportunity.

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.

Use the Groups feature to easily organize, communicate, and schedule with related contacts.

Use Group Scheduling for an 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.

Sales Process Automation

Use the built-in sales process or customise it to suit your needs.

Generate instant quotes[7] for any opportunity without having to re-key information.

Opportunity Tracking

View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.

Customise opportunity field names as well as field types in order to capture the most accurate sales and opportunity information.

Use the Product List to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price.

View graphical Sales Pipeline and drill down to see opportunity details.

Customer/Prospect Communications

Write letters in ACT! using Microsoft Word or the ACT! built-in Word Processor which supports tables, graphics, HTML, and spell checking.

Select a group of contacts and perform a mail merge to a letter or e-mail. A history is auto-generated on each Contact Record.

Create, send, and track e-mail to/from contacts using ACT! E-mail Client integrated with Outlook Express or Lotus Notes® or integrated directly with Outlook and create a history for all e-mails sent.[8]

Use pre-formatted templates to save time on e-mails, letters and memos.

Quickly identify the last communication with a contact from the Contact Detail View with the Last Reach, Last Attempt, Last Meeting, Last Letter, and Last E-mail fields.

Robust Reporting

Choose from 20+ pre-formatted Sales Reports or export to Excel®[9] with one click for further analysis using built-in, customisable pivot tables.

Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries.

Use the Report Designer to create custom reports and send most reports to Excel[9], HTML, PDF, or e-mail.

View, manage, and report on activities by user, providing administrators and managers' insight into activities initiated and completed by users.

Customization

Customize Priority, Activity, and History types for better tracking and analysis.

Field types can be designated as Date, Currency, Yes/No, Expansive Memo, and Picture fields.

Integration with Core Business Applications

Utilize direct Outlook e-mail integration from within ACT! to send messages.[10]

Integrates with popular back-office accounting solutions such as Sage Instant Accounts, Sage Line 50 and Sage MMS.

Administration and Security

ACT! Premium for Workgroups provides increased scalability to accommodate your workgroup or team.[11]

Ensure up-to-date customer information with automatic database synchronisation, backup, and maintenance.

Keep data more secure with the ability to set password rules including; Password Expiration Options, Complexity of a Password, and Password Re-use.

Assign up to five security levels including Manager and Restricted to all users, to allow different access to data and features depending on user levels.

Maintain database security with custom user permissions per user, enabling or disabling them from deleting and/or exporting to Excel.

Utilize teams function to group users and easily grant contact access to them.

Administrators, managers, and individual users can easily view team memberships.

From a Contact View, select individuals or teams that you want to grant contact access to.

Restrict access by user and by team and grant Read-Only Access or No Access to certain fields using field level security.[12]

With Silent Install,[13] easily deploy ACT! to multiple users. Administrators can pre-select preferences to ensure all users receive the same settings and desired configuration.

Mobile and Remote Workforce Support

Integrate with ACT! Premium for Web for anytime, anywhere access.[14]

Synchronise your ACT! Calendar, Contact and To-Do information, Notes, and History items to Palm OS® or Pocket PC devices.

Access critical contact and customer details through Citrix® or Terminal Services when out of the office.[15]

ACT! by Sage

For more information about ACT! by Sage 2007

Call 1850 930 390

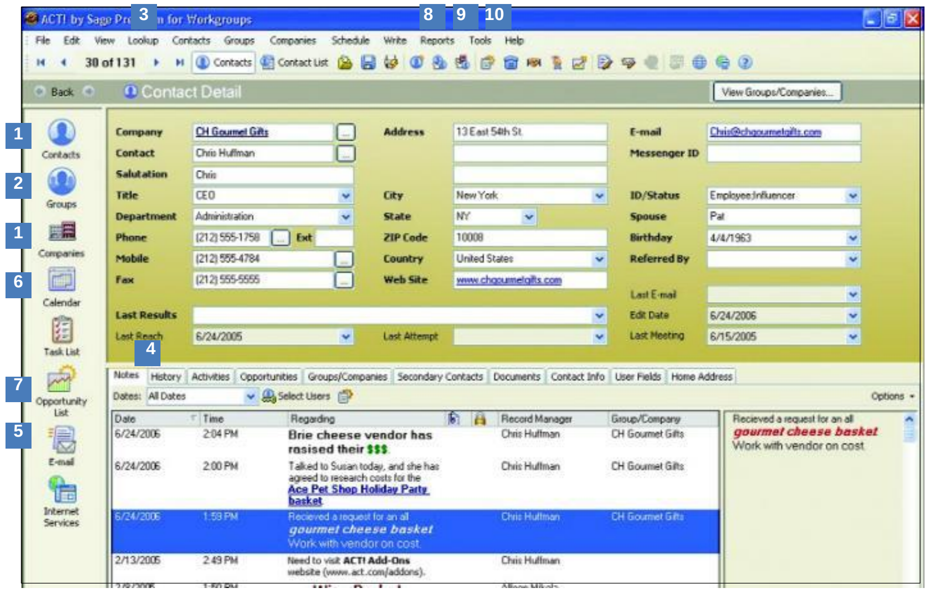
AAT Technologies
Sage Business Partner

Research & Innovation Centre
Carriganore, Waterford

3015 Lake Drive,
Citywest, Dublin

T: 1850 930 390
E: info@aat.ie
W: www.aat.ie

AAT TECHNOLOGIES
Sage Business Partner



1. **Contacts and Companies**: Associate contacts with a Company Record and view a roll-up of all associated notes, history, and opportunities.
2. **Groups**: Track collections of related contacts using the Groups feature for easier follow-up.
3. **Lookups**: Find exactly what you're looking for quickly and easily with robust lookup capabilities.
4. **Notes and History**: Enter virtually unlimited date- and time-stamped Notes and History.
5. **E-mail**: Utilise direct integration with Outlook[16] e-mail while working in ACT!.
6. **Calendar**: Automate when Outlook calendar synchronisation occurs.[17]
7. **Opportunity List**: View all sales opportunities at once or filter by Users, Estimate Close Date, Status, Sales Stage, Amount or Probability of Close.
8. **Reports**: Gain critical insight into your business using up to 40 standard reports.
9. **Administration**: Utilize automatic database synchronisation, backup, and maintenance to ensure customer information is kept up to date.
10. **Security**: Keep information secure with field level security[18] and custom user permissions.

About ACT!

ACT! is the No.1 selling contact and customer manager that enables individuals and organisations 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.

ACT! has a 19-year track record of being easy to use, customizable, and affordable for the small business market place. With more than 2.5 million registered users and 35,000 corporate accounts standardised on ACT!, ACT! continues to be the market leader in contact and customer management.

About Sage

Sage Ireland Limited offers leading business management software and services that support the needs, challenges and dreams of more than 50,000 small and mid-sized business customers in Ireland. Its parent company, The Sage Group plc (London: SGE.L), supports 5.0 million customers worldwide.

For more than 25 years, Sage has delivered easy-to-use, scalable and customisable software for accounting, customer relationship management, human resources, time tracking and the specialised needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the website at www.sage.ie.

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