



# ACT! Premium for Web 2007

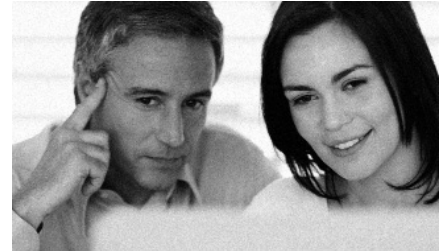
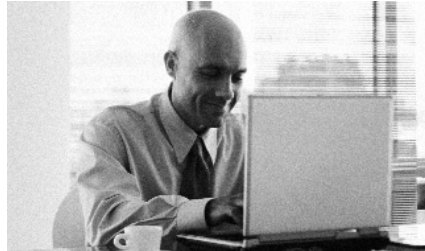
Powerful contact and customer management for your business

## Make contact. Build relationships. Get results.

ACT! Premium for Web provides contact and customer management users with anytime, anywhere access to centralized, secure data - enabling remote, traveling, or office-based users access to information in real time through a Web browser. Simple server installation allows for easy roll-out to users and provides organizations with the security of knowing that critical customer data stays within their firewalls, not on individual user PCs. ACT! Premium for Web delivers all the benefits of hosted Web-based solutions, without the recurring cost of monthly fees!

### 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
- Administration and Security



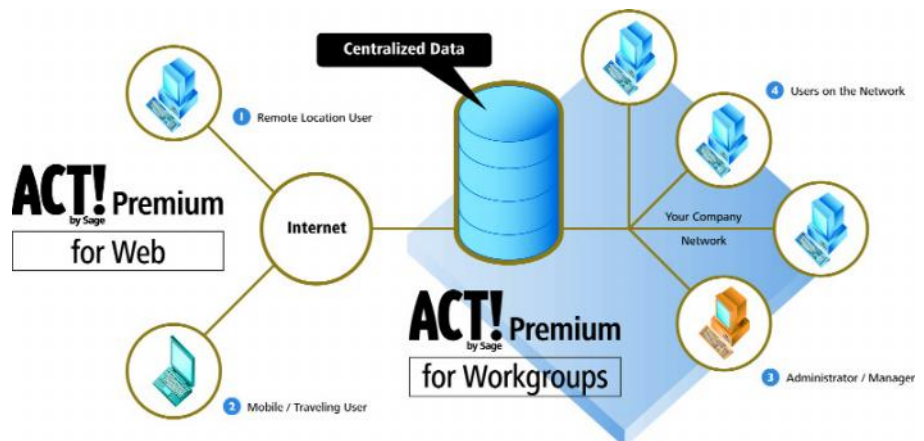
### No.1 Selling Contact and Customer Manager

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 Web provides users with instant access to centralized customer information over the Web. It looks and feels like ACT! Premium for Workgroups, yet provides all the advantages of a Web-based solution. ACT! Premium for Web offers tools to increase your sales team's productivity while providing your organisation with scalability, centralised administration, advanced contact and user security, and deployment options required to drive your business.

### Anytime, Anywhere Access to Centralised Customer Information

ACT! is a single, central repository for critical contact and customer information captured across your entire organisation. ACT! is a customer-hosted solution that enables you to access detailed contact and customer information, manage team calendars and activities, capture all customer communications, track opportunities through the sales process, and report on overall team effectiveness.

With ACT! Premium for Web, remote, travelling, and office-based users can access, update and share centralised data in real time through a Web browser. By alleviating the need for remote employees to synchronise their computers with the corporate database, you can feel confident that you always have up-to-date customer information.



### Thorough Tracking Provides More Accurate Reporting

ACT! Premium for Web enables sales professionals to track sales opportunities from initial inquiry through close using either a standard or customised 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 they're 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.

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

In conjunction with Web, Workgroups is ideal for:

Providing employees with a robust offline application for use when not connected.

Allowing employees to synchronise critical ACT! Calendar, Contact, and To-Do information to their PDAs.

Enabling select users to administer the database or create layouts and reports that can be shared with the entire workgroup.

Accessing financial information held in Sage accounting systems.

Opportunity fields are customisable as well so you can tailor ACT! to suit your business needs.<sup>1</sup> 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 multiselect values, to ensure data consistency and improve reporting accuracy. In addition, fields can be adapted and customised 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 Security Provides Additional Data Control

ACT! Premium for Web 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.<sup>2</sup>

## Centralised Administration Allows for Quick User Set-up

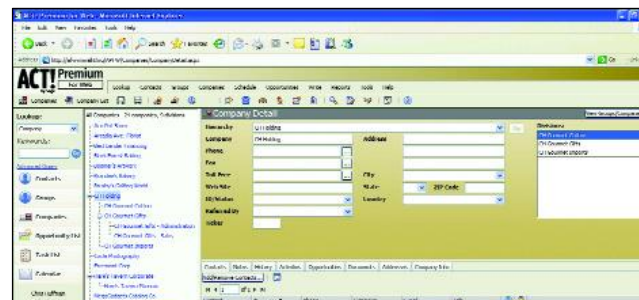
ACT! Premium for Web is installed on a server and no end-user software installation is required. Since the software is centrally managed and administered, remote employees have access to the most recent product updates, as well as all of the layouts and reports utilised in the main office.<sup>3</sup> Layouts and reports can be created once and accessed by both Windows and Web users instantly, saving valuable time.

Because ACT! Premium for Web maintains the easy-to-use ACT! Windows experience, it requires less training and support time to get users up and running quickly. And, because ACT! Premium for Web is installed on your company server, behind the firewall, you can rest assured your data is secure and that you don't have to worry about getting your data back from a third-party hosting company if you decide to discontinue the service.

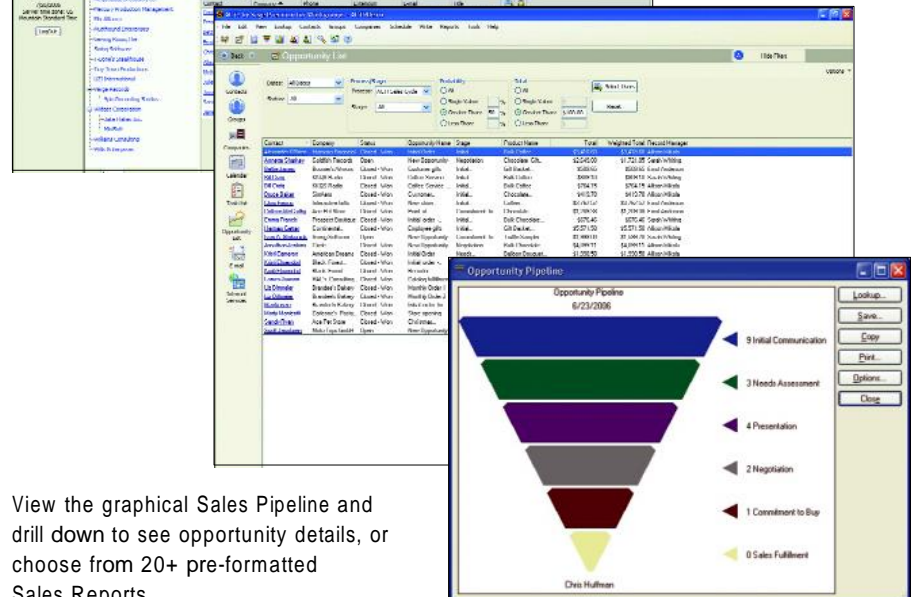
## Flexible Deployment and Remote Access Options

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

1. Customizations must be done on the ACT! Premium for Web server.
2. Only certain fields can be designated as read-only or no access.
3. In ACT! Premium for Web, this operation must be performed on the Web server.
4. Requires Microsoft Outlook 2000, 2002 or 2003
5. The Product List feature must be centrally administered from the ACT! Premium for Web server.
6. Customizations must be done on the ACT! Premium for Web server.
7. Requires Microsoft Excel 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/2007system](http://www.act.com/2007system). Published minimum system requirements are based on single user environments. You must purchase one license of ACT! per user.
9. In ACT! Premium for Web, this operation must be performed on the Web server.
10. Only certain fields can be designated as read-only or no access.
11. Requires additional license purchase.



Manage customer interactions at the company level with the Company Record feature so you have a complete view of your relationship with that organisation.



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.

Use the Groups or Company feature to easily organise, communicate, and schedule with related contacts.

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

### Calendar and Activity Management

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

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

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

Send e-mail through Microsoft® Outlook® and have a history generated to those contacts within ACT! or create, send, and track e-mail to contacts using an SMTP server (Microsoft Exchange, Internet Mail or SMTP).

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

### Note and History Tracking

Enter virtually unlimited date- and time-stamped notes and history. View a list of notes and/or see the entire contents of a note with split-panel note preview.

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

### Lookups and Groups

Perform a lookup on most fields or use Quick Search to instantly access any important contact or detail.

Perform numeric lookups such as greater than or less than queries.

Use the Groups feature to easily organise, 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 Product List<sup>5</sup> to easily enter repeated products or services and automatically fill in information such as name, item number, cost, and price.

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

### Opportunity Management

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

Customize opportunity field names as well as field types in order to capture the most accurate sales and opportunity information.<sup>6</sup>

View graphical Sales Pipeline to see opportunity details.

### Customer/Prospect Communications

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

Print from any ACT! calendar template and the contact phone number for any scheduled call is automatically printed on the calendar.

Perform mail merges using the ACT! Premium for Web built-in Word Processor and track a history on each Contact Record.

Utilize Rich Text Formatting, spell check, signatures and adding multiple attachments when e-mailing customers and prospects.

Use pre-formatted templates to save time on e-mails, letters, and memos. Easily customize the HTML graphical templates to e-mail customers.

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 Microsoft Excel<sup>7</sup> with one click for further analysis.

Access 40 standard reports including Phone Lists, Activity Reports, Relationship History, Sales Summaries, and more.

Use the Report Designer to create custom reports.<sup>6</sup>

### Customization

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

Customize Priority, Activity and History types for better tracking and analysis.<sup>6</sup>

### Administration and Security

ACT! Premium for Web provides increased scalability to accommodate your workgroup or team.<sup>8</sup>

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.<sup>9</sup>

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.<sup>10</sup>

Integrate with ACT! Premium for Workgroups for offline access or the ability to synchronise data to a PDA device.<sup>11</sup>



For more information  
about ACT! by Sage 2007

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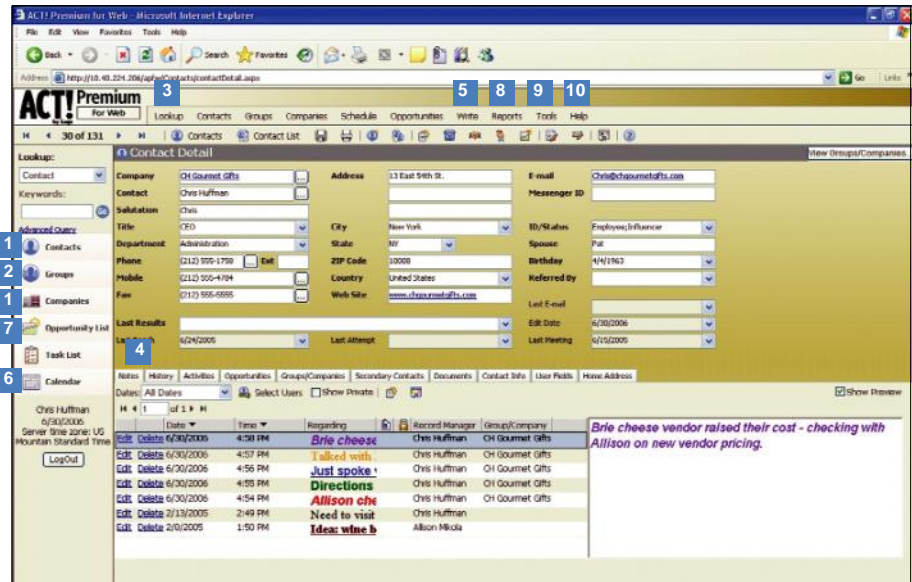


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- 1. Contacts and Companies:** Associate contacts with a Company Record and view a roll-up of all associated notes, history, and opportunities.
- 2. Groups:** Track collections of related contacts using the Groups feature for easier follow-up.
- 3. 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<sup>12</sup> e-mail while working in ACT!
- 6. Calendar:** Get daily and work week views, and pop-up details on each event as you mouse over it.
- 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<sup>13</sup> 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](http://www.sage.ie)