PROFESSIONAL COMPUTER MANAGEMENT INC.

info
NEWSLETTER for ACT! by Sage

Introducing ACT! by Sage 2009 (11.0)

The latest release, ACT! by Sage 2009 (11.0), began shipping in August. It offers tighter Microsoft Outlook integration, enhanced calendar functionality, powerful Lookup and search capabilities, and new tools to help you better administer the database. Let's take a closer look at what ACT! 2009 has to offer.

Tighter Outlook Integration

ACT! 2009 includes a number of new features that Outlook users will appreciate.

• En Masse E-mail Attach: Save steps with the new ability to select multiple Microsoft Outlook e-mail messages, from different senders, and attach them all at once to the corresponding ACT! contacts.

• ACT! Activity Scheduling From E-Mails: When you receive an e-mail requiring any type of action, you can easily schedule a new ACT! Activity from Outlook e-mail messages. This allows you to stay on top of to-dos and appointments.

• On-The-Fly E-mail History Options And Multiple Databases: In addition to globally setting your history and database options, you now have the option to select on-the-fly the ACT! history options and database destination for your e-mail messages.

• E-Mail Send from the Notes Preview Pane: When you click on the hyper-linked e-mail address displayed in the Notes preview pane, the Send E-mail message window will appear, with the e-mail address you selected already populated.

• Streamlined ACT! Setup Assistant: Now it is easier to configure the ACT! e-mail client or the e-mail and calendar integration with Outlook using the streamlined ACT! Setup Assistant. With plain-English instructions, the ACT! Setup Assistant walks users through the setup process.

• Flexible Outlook Rules and ACT!: Power users take note! You now have the option to use Outlook Rules with a custom action you set for getting e-mail messages into ACT!. This feature will allow you to manage e-mail messages received in your in-box automatically, based on the criteria you set in Outlook rules.

875 Main Street West
Lower Level, Unit 9
Hamilton, ON L8S 4P9
Email: info@pcm.on.ca

(905) 574-4332
(905) 574-6553 fax

www.pcm.on.ca

celebrating 15 years

sage software
ACT! BY SAGE
Certified Consultant
PLATINUM

Introducing ACT! by Sage 2009 (11.0)

(continued from cover)

Calendar Enhancements

Most of us live by our calendars, and so features that help us get more out of our calendar data are most welcome.

With a new Calendar Copy feature, you can copy an ACT! calendar to an Outlook calendar or your Outlook calendar to ACT! with one click on the main ACT! Toolbar. The calendar print function now respects the filters you have applied to your calendar, including type, priority, date range, and user. This eliminates the need to re-set the print filters to match your ACT! calendar filters.

When you print a monthly calendar, ACT! 2009 will print the contact names associated with any activity you have scheduled making it easy to see who is attending a meeting, for example.

For meetings with multiple contacts, you quickly can determine who is included in the activities schedule on your calendar by mousing over a scheduled activity. ACT! 2009 will show you the name of the first contact listed for the activity, not just *multiple contacts*.

Do you work within a large team? Now you can view the activities of all your team members, even if the team is larger than 10.

Improved Lookups

ACT! Lookups have been streamlined and improved as part of ACT! 2009, making it easier to find the data you need. The Lookup dialog has been simplified and enhanced with powerful search capability.

Lookups now are based on additional search operators enabling you to find what you are searching for based on only part of the name or title. For example, when searching for contacts with manager in the title, simply enter the word *manager* and ACT! will return all contacts with manager in the title, including sales manager, office manager, or manager of special services.

In ACT! 2009, you have the ability to switch your search easily between Contact, Group, or Company entities without having to start over entering your search parameters.

You now can access the Advanced Query option from the main Lookup screen and the last lookup you performed will carry over so you can refine your search further without starting over from scratch.

Likely you find yourself using the same lookups frequently. In ACT! 2009 there is a new Lookup Previous function that provides fast access to previous contact lookups. You can view the last several contact lookups, categorized by type, date, timestamp, and number of contacts in a query.

Database Maintenance Options

In this release, ACT! now automatically handles periodic database maintenance tasks and provides you with many options for tailoring maintenance to fit your needs.

The ACT! Scheduler is a powerful tool to help automate many routine tasks, and ACT! 2009 builds upon its power. ACT! users can automate tasks such as calendar copying, database backups, and maintenance from the ACT! Scheduler. These features were previously only available to ACT! Premium users. In addition, new time options are available for each of these tasks, enabling you to automate these functions multiple times per day, at the times you specify.

The process of installing a remote database is significantly easier in ACT! 2009. All you need to do is open or double-click the ACT! RDB (remote database) file, click *OK*, and ACT! does the rest.

To reduce the size of your backups, you now have the option to exclude attachments from your database backups. This will speed the backup process, especially if you have a large number of attachments.

ZOOM IN
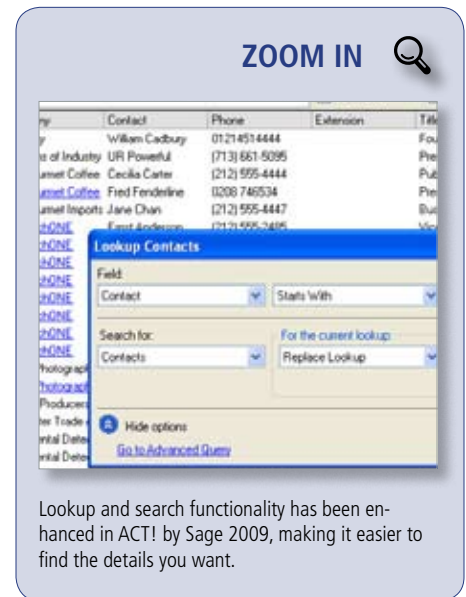
Lookup and search functionality has been enhanced in ACT! by Sage 2009, making it easier to find the details you want.

When configuring ACT! on user's computers, your ACT! Administrator will appreciate the ability to view the name of the logged-in user, the date and time of the last login, and the user's ACT! security role by mousing over the user name included in the lower right corner of the screen.

Monitor the progress of your ACT! synchronization with the new streamlined Sync Progress Bar. It includes five steps with easy-to-understand terminology. You can see the length of time it will take for your sync to complete and determine which of the synchronization steps were successfully completed.

Edition Differences

The new functionality extends to the ACT! by Sage, ACT! by Sage Premium, and ACT! by Sage Premium for Web editions. However, be aware that some of the features may not be available, or may operate slightly differently than described in the ACT! Premium for Web edition.

Call us for more information about ACT! by Sage 2009.