

What Are You Missing By Not Upgrading Your Software?

When your software solution works, it sometimes feels easier to just stay with the status quo rather than upgrade as newer versions are released. However, if you're behind, even a couple of versions, you are missing out on powerful and valuable functionality that can pay for itself in the efficiencies delivered. In this article we highlight the features and benefits offered by the two most recent releases of ACT! by Sage—ACT! by Sage 2008 (10.0) and ACT! by Sage 2009 (11.0).

ACT! 2008

Are you still using ACT! by Sage 2007 (9)? ACT! 2008 was one of the most significant releases in years. Here's a recap of the major features included in ACT! 2008.

Interactive Dashboard

The Dashboard feature consists of six components together on a single screen that you can tailor to meet your needs. With the Dashboard you have a comprehensive view of the information you care about most. The Components are:

- Schedule At-A-Glance
- Activities by User (My Activities)
- Opportunity Pipeline by Stage
- Opportunities by User
- Top 10 Opportunities
- Closed Sales to Date.



List Edit Mode

When in the List View, you can directly edit fields for a Contact, Group, or Company. Change phone numbers, addresses, correct a misspelling—all without opening the record.

Multiple Contacts Per Opportunity

You can assign more than one Contact per Opportunity, so that you can track all decision makers associated with a sales opportunity.

Document Shortcuts

You can add shortcuts to related documents to Activity and History items instead of attaching the full document. This helps you control the size of your database, allows for editing of the documents outside of ACT!, and ensures the most updated version is available by way of the shortcut in the ACT! database.

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Duplicate Checking

ACT! 2008 added a more powerful duplicate checking function. As a new Contact, Company, or Group record is entered, ACT! automatically will check for duplicate first and last names. When a duplicate record is found, you will receive a prompt informing you of the duplication and providing the option to continue or cancel the entry.

Security And Data Integrity

Administrators can control data security by limiting user or team access to any group or company record. You can determine which users can view and edit group and company data, limiting access to any new groups and companies created based on established security preferences. Administrators also can temporarily suspend a remote database from synchronizing to the parent database, protecting against unwanted data or deletions to the parent database to help administrators diagnose a potential synchronization problem or issue.

ACT! 2009

The most current release, ACT! by Sage 2009, offers tighter Microsoft® Outlook® integration, enhanced calendar functionality, powerful lookup and search capabilities, and new tools to help you better administer the database. Here is a look at some features and enhancements you can benefit from by upgrading to ACT! 2009.

Tighter Outlook Integration

ACT! 2009 includes new features that Outlook users will appreciate, including:

- En masse e-mail attach
- ACT! activity scheduling from e-mails
- On-the-fly e-mail history options and multiple databases
- E-mail send from the Notes Preview pane

- Streamlined ACT! Setup Assistant
- Option to use Outlook rules with a custom action you set for getting e-mail messages into ACT!.

Calendar Enhancements

- With the new Calendar Copy feature, you can copy an ACT! calendar to an Outlook calendar or vice versa with one mouse-click on the main ACT! Toolbar.
- Do you work in 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 were streamlined and improved as part of ACT! 2009 to make it easier to find the data you need.

- Lookups are based on additional search operators, so you can find what you are searching for based on only part of the name or title. For example, enter *manager* and ACT! will return all contacts with manager in the title, including sales manager, office manager, or manager of special services.
- Switch your search easily between Contact, Group, or Company entities without having to start over entering your search parameters.
- 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.
- A Lookup Previous function 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

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. New time options are available for each of these tasks to enable you to automate these functions multiple times per day, at the times you specify.
- Installing a remote database is significantly easier. All you need to do is open or double-click the ACT! RDB (remote database) file, click OK, and ACT! does the rest.
- To speed the backup process and reduce the size of your backups, you now have the option to exclude attachments from your database backup process.
- When configuring ACT! on a user's computer, your ACT! Administrator can 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 Sync Progress Bar. See how long it will take for your synchronization to finish and which of the steps were successfully completed. Please be aware that some functionality will vary based on the edition of ACT! that you are running. We're happy to provide complete details on the functionality now available within ACT!, just give us a call. ✨