

Introducing ACT! by Sage 2010

ACT! by Sage 2010 is available, and it offers time-saving efficiencies, enhanced sales and marketing tools, and fabulous insight into your entire ACT! database. In this article we detail many of the new features.

Newly Designed Look

ACT! 2010 has a new look, with easy to learn and use navigation. The new streamlined layout provides you with instant search access from any view without the need to go through the lookup dialog screen. Related tasks are listed for one-click convenience, giving you more options for working with Contacts, Groups, and Opportunities.

The menus are consolidated, including the most relevant feature options; big, easy buttons give you access to the tasks you use most often; and a *New* button allows you to create new contacts, new activities, and more.

From the ACT! Welcome page, you can get more out of ACT! with quick access to common resources, tips on using ACT!, where to go for help, and ACT! news.

Social Media Integration

This latest version takes advantage of leading-edge Web 2.0 technology that automatically integrates profiles and data from the most popular social media sites with ACT!,



giving you more information about your customers.

The social networking/media integration allows you to look up and capture an individual's online profile data and incorporate the data into their ACT! customer profile if desired.

Social media sites supported with ACT! 2010 are:

- Facebook
- LinkedIn®
- Plaxo
- ZoomInfo Contact
- Contact's Web site
- Google™, Google Maps™, Google News™, Google Driving Directions
- Weather
- Yahoo!® Local Info

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- Yahoo! Person

E-mail And Drip Marketing

Use ACT! E-marketing, powered by Swiftpage integration, to create and send e-mail and drip marketing campaigns, track open and click-through rates, and manage opt-outs. Please see our article on page 4 for details about the new ACT! E-marketing powered by Swiftpage integration.

New Dashboards And Reports

ACT! 2010 adds a new streamlined reports view that helps you easily understand which reports are available, allows you to mark reports as favorites for quick access, and customize report descriptions for a view that's personalized to each user's needs.

In addition, 13 new reports are added in ACT! 2010, delivering valuable insight into your sales and marketing efforts:

- Opportunities by Record Manager and Process
- Opportunity Summary by Record Manager and Process
- Opportunities by Process and Status
- Opportunities by Estimated Closing Month
- Won Opportunities and Days Open
- Won Opportunity Summary by Sales Process
- Won Opportunities by Sales Process and Competitor
- Won Opportunities by Sales Process and Reason
- Won Opportunities by Sales Process and Record Manager
- Won Opportunities by Sales Process
- Won Opportunities by Actual Closing Month
- Pipeline Report by Sales Process and Stage
- Pipeline Report and Products by Sales Process and Stage

The ACT! Dashboards have proved to be a popular feature, and ACT! 2010 adds new dashboards, giving you at-a-glance snapshots of your customers, your sales opportunities, and even your users. New dashboard charts include:

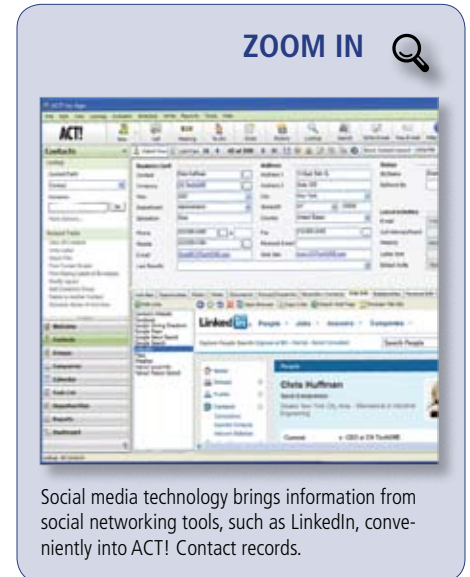
- Recently Created Contacts
- Recently Edited Contacts
- Contact History Count by History Type
- Contacts by Country
- Contacts by Department
- Opportunities Open by Product
- Opportunities with Contact Info
- Opportunities by Products
- Opportunity Weighted Total by Stage
- Remote Database Information by User
- Remote Database Sync Status by User
- User Status

While ACT! includes dozens of informative standard reports, there may be times when you can't find the exact report you need. Version 2010 allows you to create custom reports with the new connector for your report writer. The new connector for third-party report writers, such as Crystal Reports® or OLE DB, gives you the ability to run reports on everything you keep in ACT!, including, user information, activities, groups, and companies.

Calendar Invitations

Not all of your customers use ACT!. That's why ACT! 2010 allows you to send calendar invitations and contacts from ACT! to leading e-mail solutions using iCalendar, and the invitations you send will appear on your customers' calendar. E-mail solutions using iCalendar include:

- Gmail™
- Apple® iCal®
- Windows Live™
- Facebook
- GroupWise®
- Outlook®
- Lotus Notes®



Social media technology brings information from social networking tools, such as LinkedIn, conveniently into ACT! Contact records.

In addition, you now can send ACT! contacts in vCard format to non-ACT! users with just a few clicks—no retyping or cutting and pasting required.

Customizable Opportunities

ACT! 2010 provides the ability to add fields, customize products and services, personalize layouts, and track activities and history related to Opportunities. The redesigned sales tracking functionality allows you to tailor opportunities to fit your organization's selling model, maximizing the effectiveness of your lead management. Sales opportunities now behave and appear like Contacts, Groups, and Companies, making them more flexible and usable than ever.

Note that some of the functionality may vary based on the edition of ACT! that you are using (ACT! by Sage, ACT! by Sage Premium, or ACT! by Sage Corporate Edition). Call us for details.

Please contact us for upgrade information or for a demonstration of the new functionality available in ACT! 2010. ✨

ACT! by Sage Version Comparison Chart

ACT! by Sage improves every year. Here's a quick reference chart outlining many of the newest features. If you'd like a complete list of features added since ACT! Version 6, or have questions about what you see here, please give us a call.

	ACT! Version 2008	2009	2010
Calendar & Activity Management			
ACT! activity scheduling from Microsoft® Outlook® e-mails		✓	✓
Improved printing		✓	✓
Support for iCalendar			✓
Marketing Communications			
En masse e-mail attaching		✓	✓
E-mail send from the notes preview pane		✓	✓
E-mail marketing, survey and Web forms; marketing results tab; and drip marketing			✓
Mail merge in ACT! by Sage Premium for Web with Word			✓
Contact & Customer Management			
Duplicate checking by first and last name	✓	✓	✓
Related contacts		✓	✓
Streamlined, easier to learn and use layouts with new colors			✓
Related tasks			✓
Consolidated menus			✓
Big, easy buttons			✓
Welcome page			✓
Social media integration			✓
Lookups & Searching			
Instant access to search			✓
Sales Opportunity Management			
Opportunity date fields	✓	✓	✓
Customizable opportunities			✓
New ACT! sales processes			✓
Instant quotes in ACT! Premium for Web with Word <small>(Requires Microsoft Excel and Word 2002, 2003, or 2007)</small>			✓
Dashboards & Reporting			
ACT! Premium dashboard with team views			✓
Streamlined reports view			✓
New dashboards			✓
13 new reports			✓
New OLE DB provider			✓
Anywhere Access			
iPhone Support <small>(Requires an additional purchase)</small>			✓

IN THE SPOTLIGHT: ACT! E-marketing Powered By Swiftpage

ACT! E-marketing, powered by Swiftpage, is tightly integrated with ACT! 2010. You can design and execute marketing campaigns from within ACT! and prioritize sales and other marketing activities automatically, allowing you to connect with your customers in many new and powerful ways.

ACT! E-marketing is an end-to-end marketing tool that intelligently and automatically reaches out to your ACT! contacts, runs e-mail marketing campaigns in minutes, and delivers results right to the ACT! Contact Record. It can save you money by helping you focus on the right prospects and customers. You can choose from a range of (optional) service plans that enable e-mail, survey, Web form, and drip marketing features. Let's learn more.

Create, Send, And Track E-Mail

With ACT! E-marketing, you can design an e-mail template, select which contacts to send it to, and schedule it for delivery whenever you want. Choose from dozens of pre-built templates and use the simple online editor to plug in your branding and contact details or import your own HTML template.

ACT! E-marketing saves you time while helping you capitalize on the hottest opportunities; it sends e-mails to the ACT! contact, or group of contacts, that you specify and then allows you to record the responses back to the ACT! database—even creating a Call List of the hottest prospects if you wish. Imagine how effectively you can target your marketing

messages when you know who opened your e-mail, what links they clicked on, and how many times they forwarded the message.

You can send one message or 100,000 messages—there are no send-limit restrictions. Your messages are sent by way of the powerful Swiftpage servers so you aren't limited by your ISP's filters and send limits. In addition, Swiftpage handles the opt-out messages for you, ensuring you remain in compliance with anti-SPAM laws.

Drip Marketing

Drip Marketing allows you to create multi-step marketing plans and then drop segmented contacts into a campaign specific to their preferences.

You can create a Drip Marketing campaign with e-mail, call lists, postcards, and more, and deliver your messages automatically at prescribed intervals or when specified conditions occur.

Drip Marketing blends simple functionality, such as the ability to automatically send a sequence of marketing messages to a contact who filled out a form on your Web site, with intelligent technology that will send different messages to contacts based on their previous actions. For example, it can send a postcard to those who did not open the previous e-mail—automatically!

Surveys And Web Forms

In addition to e-mail templates and Drip Marketing campaigns, you can design Web forms or electronic surveys to send to your

contacts or add a form to your Web site, to collect information from prospective or existing contacts.

ACT! E-marketing, powered by Swiftpage, requires an additional subscription. A trial is available. Call us for more information about how you can get ACT! E-marketing up and running in your organization. ★

CONTACT INFORMATION

875 Main Street West
Lower Level, Suite 9
Hamilton, ON L8S 4P9
Email: info@pcm.ca
(905) 574-4332
(905) 574-6553 fax
www.pcm.ca

