

ACT! | Feature Chart

ACT! by Sage Version Comparison Chart

Vergelijk uw versie met ACT! by Sage 2010 en ontdek welke nieuwigheden u van nut kunnen zijn !

Features	6.0	2005	2006	2007	2008	2009	2010
Manage Relationships							
Separate notes and history tabs		✓	✓	✓	✓	✓	✓
Notes and history shared between contacts		✓	✓	✓	✓	✓	✓
Unlimited secondary contacts		✓	✓	✓	✓	✓	✓
Rich text formatting including colors, bullets, graphics, and URLs		✓	✓	✓	✓	✓	✓
Attach documents to activities and history		✓	✓	✓	✓	✓	✓
Synchronize attachments		✓	✓	✓	✓	✓	✓
Groups with 15 levels of hierarchy (14 subgroups)		✓	✓	✓	✓	✓	✓
Dynamic group membership		✓	✓	✓	✓	✓	✓
Company records		✓	✓	✓	✓	✓	✓
Contacts linked to companies		✓	✓	✓	✓	✓	✓
Tree view for companies			✓	✓	✓	✓	✓
Split panel notes and history preview				✓	✓	✓	✓
Hyperlink to companies from contact list view			✓	✓	✓	✓	✓
Specify linked contact/company fields				✓	✓	✓	✓
Print any ACT! calendar template with the contact phone number	✓		✓	✓	✓	✓	✓
View all group associations	✓		✓	✓	✓	✓	✓
Duplicate checking for groups and companies					✓	✓	✓
Advanced queries for groups and companies	✓				✓	✓	✓
List edit mode ¹	✓				✓	✓	✓
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							✓
Search							
Lookup indicator ¹	✓			✓	✓	✓	✓
Edit existing queries ¹	✓			✓	✓	✓	✓
Advanced keyword search	✓			✓	✓	✓	✓
Save lookups as groups		✓	✓	✓	✓	✓	✓
Streamlined lookup functionality						✓	✓
Instant access to search							✓

Features

6.0 2005 2006 2007 2008 2009 2010

Features	6.0	2005	2006	2007	2008	2009	2010
Be More Productive							
Rich text formatting in activity details		✓	✓	✓	✓	✓	✓
Five calendar views, including daily, weekly, and monthly		✓	✓	✓	✓	✓	✓
View global events		✓	✓	✓	✓	✓	✓
Change activity organizer	✓		✓	✓	✓	✓	✓
ACT! activity scheduling from Microsoft® Outlook® e-mails						✓	✓
Improved printing						✓	✓
Support for iCalendar							✓
Market Effectively							
Built-in spell checker		✓	✓	✓	✓	✓	✓
Improved mail merge		✓	✓	✓	✓	✓	✓
Validate and correct addresses during mail merge		✓	✓	✓	✓	✓	✓
ACT! e-mail find		✓	✓	✓	✓	✓	✓
Last e-mail field				✓	✓	✓	✓
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 (requires additional subscription)							✓
Mail merge in ACT! by Sage Premium for Web with Word							✓
Sell More							
Opportunity list view		✓	✓	✓	✓	✓	✓
Opportunity lookups		✓	✓	✓	✓	✓	✓
Instant quotes ²		✓	✓	✓	✓	✓	✓
Multiple built-in ACT! sales processes		✓	✓	✓	✓	✓	✓
Track multiple products		✓	✓	✓	✓	✓	✓
Generate and import product list		✓	✓	✓	✓	✓	✓
Opportunity date fields				✓	✓	✓	✓
Customizable opportunities							✓
New ACT! sales processes							✓
Instant quotes ² in ACT! Premium for Web with Word							✓
Measure Results							
20+ preformatted/streamlined sales reports		✓	✓	✓	✓	✓	✓
Graphical sales pipeline with drill down to see opportunity details		✓	✓	✓	✓	✓	✓
ACT! dashboard					✓	✓	✓
ACT! Premium dashboard with team views					✓	✓	✓
Streamlined reports view							✓
New dashboards							✓
13 new opportunity reports							✓
New OLEDB provider							✓

Note: Shaded cells indicate an upgrade to ACT! by Sage Premium is required.

Features

6.0 2005 2006 2007 2008 2009 2010

Features	6.0	2005	2006	2007	2008	2009	2010
Share and Secure							
Group scheduling		✓	✓	✓	✓	✓	✓
Manage resources including conference rooms and equipment		✓	✓	✓	✓	✓	✓
Five security levels		✓	✓	✓	✓	✓	✓
Mark notes and opportunities as private		✓	✓	✓	✓	✓	✓
Secure notes, history, and opportunities en masse				✓	✓	✓	✓
Field level security				✓	✓	✓	✓
Company security					✓	✓	✓
Group and company security					✓	✓	✓
Personalize³							
Share drop-down lists across different fields		✓	✓	✓	✓	✓	✓
Field types – picture, yes/no, memo, and e-mail		✓	✓	✓	✓	✓	✓
Customizable drop-downs		✓	✓	✓	✓	✓	✓
Utilize multi-select values		✓	✓	✓	✓	✓	✓
Customizable priority, activity, and history types		✓	✓	✓	✓	✓	✓
Customizable opportunity field names and types with drop-down lists			✓	✓	✓	✓	✓
Access							
ACT! Premium for Web			✓	✓	✓	✓	✓
Citrix [®] or terminal services support			✓	✓	✓	✓	✓
BlackBerry ^{™4}			✓	✓	✓	✓	✓
iPhone ^{™4}							✓
Integrate							
Export to Excel [®]		✓	✓	✓	✓	✓	✓
Use ACT! as Outlook address book		✓	✓	✓	✓	✓	✓
ACT! e-mail client integrated with Outlook, Outlook Express, or Lotus Notes [®]	✓		✓	✓	✓	✓	✓
Create ACT! contacts from Outlook e-mail ¹				✓	✓	✓	✓
Attach Outlook e-mail to ACT! contacts				✓	✓	✓	✓
Specify default history types and create ACT! history from Outlook				✓	✓	✓	✓
Flexible Outlook rules and ACT!						✓	✓
Support for vCard							✓

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Features

6.0 2005 2006 2007 2008 2009 2010

Administer and Maintain ³	6.0	2005	2006	2007	2008	2009	2010
Scalability to accommodate teams of 10+		✓	✓	✓	✓	✓	✓
Query-based sync		✓	✓	✓	✓	✓	✓
View team memberships			✓	✓	✓	✓	✓
Grant contact access en masse			✓	✓	✓	✓	✓
Lookup contacts by access			✓	✓	✓	✓	✓
Custom user permissions			✓	✓	✓	✓	✓
Automatic database sync and backup			✓	✓	✓	✓	✓
Improved administration for remote users			✓	✓	✓	✓	✓
Support for non-local machine administrators			✓	✓	✓	✓	✓
Silent install ⁵			✓	✓	✓	✓	✓
Automatic database maintenance				✓	✓	✓	✓
Password rules				✓	✓	✓	✓
ACT! scheduler in ACT!						✓	✓
ACT! scheduler with hourly options						✓	✓
Simplified installation of a remote database						✓	✓
Streamlined sync progress bar						✓	✓
Option to exclude attachments from backups						✓	✓
Quick info for logged-in users						✓	✓
Create remote databases simultaneously							✓
Specify currency at the time of database creation							✓

Note: Shaded cells indicate an upgrade to ACT! Premium is required.

1 This feature is not available in ACT! Premium for Web.

2 Requires Microsoft Excel and Word 2002, 2003, or 2007.

3 In ACT! Premium for Web, administrative functions must be performed on the Web server.

4 Requires additional purchase.

5 Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.

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Important Note: Review ACT! system requirements at www.act.com/2010systreq. You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database.

Check with your add-on product provider to determine compatibility.

Important Note for ACT! 6.0 or Prior Customers: Customer activation and registration are required to use ACT!. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, e-mail/modem-based database synchronization, and SideACT!.

Over ACT!

ACT! by Sage is het bestverkopende contact- en klantenbeheer programma wereldwijd met 2,8 miljoen gebruikers. Het is ontworpen zodat u het geheel van uw klantenrelaties kan organiseren op 1 enkele plaats om een volledig overzicht te krijgen op de mensen waarmee u zaken doet. Verbeter uw marketing efficiëntie zodat u makkelijk nieuwe klanten overtuigt en meer haalt uit uw bestaande relaties. Onderneem tevens actie op uw best gekwalificeerde verkoopsmogelijkheden met behulp van een overzichtelijke en volledige pipeline. Dankzij het gebruiksgemak wordt u nog productiever. Blijf gewoon verder werken met uw bestaande zakelijke oplossingen zoals Microsoft Outlook, Word, Excel en Lotus Notes, want zij integreren tenslotte perfect in ACT!

Over Sage CRM Solutions

Sage CRM Solutions is een portfolio van vooraanstaande toepassingen, bestaande uit ACT! by Sage, Sage CRM en Sage SalesLogix. Meer dan 63.500 organisaties en 3,1 miljoen gebruikers maken wereldwijd gebruik van Sage CRM Solutions om winstgevende en duurzame economische relaties te ontwikkelen.

Onze gegevens

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