

What's New? Check Out the Features Developed Since Your Version



Find the version you are using in the chart and any "ticked" features represent what you will receive if you upgrade. Then call Sage on 0800 33 66 33 to order ACT! 2009 (v11) today.

	ACT! 6.0	ACT! 7.0	ACT! 8.0	ACT! 2007	ACT! 2008
Contact and Customer Management					
Separate Notes and History tabs	✓				
Notes and History shared between Contacts	✓				
Unlimited Secondary Contacts	✓				
Rich text formatting including colours, bullets, graphics, URLs	✓				
Attach documents to Activities and History	✓				
Synchronise attachments	✓				
Groups with 15 levels of hierarchy (14 Subgroups)	✓				
Dynamic Membership	✓				
Split Panel Notes Preview	✓	✓	✓		
Hyperlink to Companies from Contact List view	✓	✓			
Specify Linked Contact/Company fields ¹	✓	✓	✓		
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		✓	✓	✓	
Duplicate checking by first and last name		✓	✓	✓	
Company Management					
Company Records	✓				
Contacts linked to Companies	✓				
Tree view for Companies	✓	✓			
Intuitive Interface					
Streamlined Setup Assistant	✓	✓	✓	✓	✓
Lookups and Searching					
Lookup Indicator ²		✓	✓		
Edit existing Queries ²		✓	✓		
Advanced Keyword Search ²		✓	✓		
Save Lookups as Groups	✓				
Easy and powerful Lookups	✓	✓	✓	✓	✓
Fast access to previous contact Lookups	✓	✓	✓	✓	✓
Sales Opportunity Management					
Opportunity list view	✓				
Opportunity Lookups	✓				
Instant Quotes ^{3 2}	✓				
Multiple built-in ACT! sales processes	✓				
Track multiple products	✓				
Generate and import product list ⁴	✓				
Opportunity date fields	✓	✓	✓		
Calendar and Activity Management					
Rich text formatting in Activity details	✓				
Five calendar views including daily, weekly, and monthly	✓				
View global events	✓				
Change activity organizer		✓			
Automatic Outlook calendar sync ²	✓	✓	✓		
ACT! activity scheduling from Outlook e-mails	✓	✓	✓	✓	✓
One-click calendar copy	✓	✓	✓	✓	✓
Calendar printing improvements	✓	✓	✓	✓	✓
Calendar visibility improvements	✓	✓	✓	✓	✓

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Prospect and Customer Communications					
Built-in spell checker	✓				
Improved Mail Merge	✓				
Validate and correct addresses during Mail Merge	✓				
ACT! E-mail Find	✓				
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 ⁵	✓	✓	✓		
Attach Outlook e-mail to ACT! Contacts ⁵	✓	✓	✓		
Specify default history types and create ACT! history from Outlook ⁵	✓	✓	✓		
Use flexible Outlook Rules in ACT!	✓	✓	✓	✓	✓
Last E-mail field	✓	✓	✓		
En Masse E-mail attaching	✓	✓	✓	✓	✓
E-mail send from the Notes Preview Pane	✓	✓	✓	✓	✓
Dashboards and Reporting					
ACT! Dashboard	✓	✓	✓	✓	
ACT! Premium Dashboard with team views	✓	✓	✓	✓	
20+ preformatted/streamlined sales reports	✓				
Graphical sales pipeline with drill down to see opportunity details	✓				
Data Sharing and Security					
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 ⁶	✓	✓	✓	✓	
Group and Company security ⁷	✓	✓	✓	✓	
Customisation					
Share drop-down lists across different fields	✓				
Field types – Picture, Yes/No, Memo, E-mail	✓				
Customisable drop-downs; utilize multi-select values ⁴	✓				
Customisable Priority, Activity, and History types ⁴	✓				
Customisable opportunity field names and types with drop-down lists ⁴	✓	✓			
Administration					
Scalability to accommodate larger teams ⁸	✓				
View team memberships ⁴	✓	✓			
Grant Contact access en masse ⁴	✓	✓			
Lookup Contacts by access	✓	✓			
Custom user permissions	✓	✓			
Automatic database sync and backup ⁴	✓	✓			
Automatic database maintenance ⁴	✓	✓	✓		
Password rules	✓	✓	✓		
Query-based sync	✓				
Improved administration for remote users ⁴	✓	✓			
Support for Non-Local Machine Administrators ^{9,4}	✓	✓			
Silent Install ¹⁰	✓	✓			
ACT! Scheduler in ACT!	✓	✓	✓	✓	✓
ACT! Scheduler with hourly options ¹¹	✓	✓	✓	✓	✓
Simplified installation of a remote database	✓	✓	✓	✓	✓
Streamlined sync progress bar	✓	✓	✓	✓	✓
Option to exclude attachments from backups ¹¹	✓	✓	✓	✓	✓
Quick info for logged-in users	✓	✓	✓	✓	✓

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Mobile and Remote Access					
BlackBerry® ¹²	✓	✓			
Citrix® or Terminal Services ¹³ support	✓	✓			
Microsoft® Office Integration					
Tighter Outlook integration	✓	✓	✓	✓	✓
Export to Excel®	✓				

Note: Shaded cells indicate that an upgrade to ACT! by Sage Premium 2009 (11.0) is required to inherit that new and improved feature listed.

Important Note: Sage recommends you review ACT! 2009 Solutions system requirements at www.sage.co.uk/act/systreq to ensure you meet these requirements. **Compatibility:** ACT! cannot be used in conjunction with ACT! Premium. ACT! Premium is only compatible with their respective same editions. **Add-on Solutions:** Visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

Important Note for Customers Using ACT! 2004 (6.0) or Prior: Customer activation and registration are required to use ACT! Solutions. 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!.

- 1 Not all fields can be linked and linked field types must be compatible.
- 2 This feature is not available in ACT! Premium for Web.
- 3 Requires Microsoft Excel and Word 2002, 2003, and 2007.
- 4 In ACT! Premium for Web, this operation must be performed on the Web server.
- 5 ACT! must be added as an Outlook address book to use this feature.
- 6 In order to utilize Company Security, you must add the Company Access control to your layout.
- 7 Limited access Group and Company names will be viewable from the tree view, but all associated information will remain inaccessible.
- 8 Scalability will vary based on hardware and size and usage of your database. Published minimum system requirements found at: www.sage.co.uk/act/systreq are based on single user environments. You must purchase one license of ACT! per user.
- 9 Must be a member of the Microsoft Windows administrator's group to perform the following: Install, register, and activate ACT!. Features such as ACT! Scheduler (Premium product only), sharing database with other users, and changes to handheld sync settings must be performed by a Windows administrator.
- 10 Delivered as an MSI package. Software to distribute MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate.
- 11 In ACT! Premium for Web, administrative functions must be performed on the Web server.
- 12 Requires additional purchase.
- 13 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0.

About ACT!

The number 1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 43,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an “anywhere” workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.

Sage is a leading supplier of business management software and services to 5.7 million customers worldwide. From small start-ups to larger organisations, we make it easier for companies to manage their business processes. Our purpose is to help our customers run their businesses more effectively, helping them to gain greater insight into their business activities and providing them with lasting benefits by automating their business processes.

Order today!

- Call 0800 33 66 33
- Contact your ACT! Business Partner
- Visit www.sage.co.uk/act



Sage (UK) Limited,
North Park, Newcastle upon Tyne,
NE13 9AA

Tel 0191 294 3000
Fax 0845 245 0297
www.sage.co.uk