

ACT!™

by **sage** PASTEL



**CONTACT MANAGEMENT
AND CRM**

BUILD CONTACTS, MANAGE RELATIONSHIPS & GET RESULTS

10 Reasons Why Businesses Use ACT!

- Complete contact information is instantly available in one database, which means no time is wasted searching for information.
- ACT! is incredibly easy to use.
- ACT! is a proven package developed over 20 years and is used by 2 million people worldwide.
- Compared with most rival systems, ACT! is a highly affordable solution.
- The calendar and dashboards help people manage their time effectively.
- ACT! is extremely versatile and can be adapted to suit almost any type of business.
- Mail and e-mail merge features help businesses stay in touch with contacts.
- Sales tools help staff focus on the right opportunities at the right time and beat their targets.
- Option for remote synchronization and PDA sync means that ACT! can be delivered to staff wherever they work.
- Sophisticated user access controls ensure customer data stays protected.

MANAGING CONTACTS

- Complete contact information is stored in one central place, so no time is wasted searching for information.
- Log notes and history entries against ACT! contact records to track important conversations, meetings and other communications or relationship detail.
- Attach e-mails, Microsoft® Word files, document shortcuts, scanned faces, images and other files.
- Apply a history entry to an individual ACT! record or to a group of contacts.
- All note and history entries are date and time stamped with a record of the relevant user name.

Staying in Touch

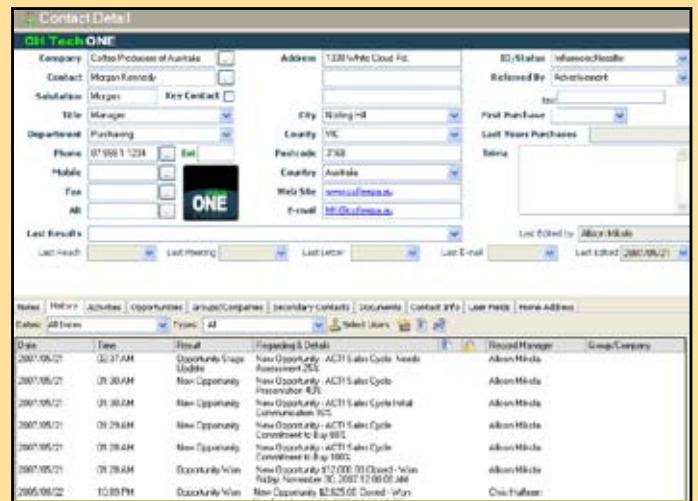
- Schedule activities to ensure no meetings, phone calls and other tasks fall through the cracks.
- Assign activities to other ACT! users.
- Set alarms to trigger pop-up alerts of urgent activities.
- Use start / finish times or full day event scheduling.
- Automatically roll-over any outstanding activities to the next day to ensure nothing gets missed.
- Schedule global events, including holidays, which appear in everyone's ACT! calendar.
- Utilize the Activity Series function to create a sequence of activities around a specific date. An activity series can be used to support project planning, follow up campaigns or for any other processes where several steps must be carried out.
- ACT! calendar views provide a clear outlook of where you stand at any time. It includes daily, weekly, monthly and working week calendars.

Company Management

- If you deal with several people in one organization, ACT! allows you to link individual contacts to a company. By viewing the master company record, consolidated communications from every linked record are shown.

Segment Contacts into Groups

- Organize contacts into groups to reflect any relevant criteria including sales territories, products mailing lists and more.
- Apply dynamic rules to automate group membership.
- Add up to as many as 15 sub-groups for effective group classification.
- Structured trees simplify navigation through each group level.



COMMUNICATING WITH CONTACTS

Send personalised letters and mail merges

- Write to individual contacts or mail merge to multiple people.
- Personalise Microsoft® Word letters, e-mail and other data documents from ACT! fields to include a salutation, product information, dates and any other relevant detail.
- Correspondence sent is automatically attached to the ACT! contact's history, so everything remains centralized.

Integrate ACT! with Microsoft® Outlook®

- Send Outlook® e-mails directly from ACT! and record a copy in the ACT! database.
- Add your ACT! address to Outlook® and ACT! will automatically attach a copy of each Outlook® Sent Item to the corresponding ACT! contact history.
- Create new ACT! contacts from Outlook® e-mails received.

E-mail merge to customers and prospects

- Create e-mail templates for newsletters, promotions and other communication to send mass e-mail merges.
- E-mail an entire customer base or build mailing lists to target specific contacts.

MANAGING SALES, PIPELINE AND FORECASTING REPORTS

Create sales cycles which reflect your selling stages

- Define sales cycles to track opportunities through each selling stage. If you sell more than one product or service ACT! lets you add as many customised sales processes as you need.
- Include multiple product and service lines for each opportunity.
- Assign an estimated close date and a probability of closure to each opportunity for effective sales forecasting
- Log extra opportunity information in custom fields or in a notes detail area.

Effective Sales Tracking

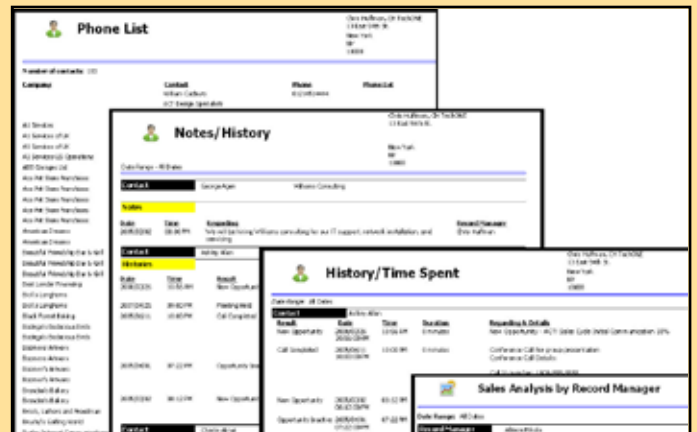
- Track sales opportunities from an initial lead to closure, to make sure potential business doesn't slip through the cracks.
- Manage all your prospects in one place with the ACT! Opportunity List View. Filter, sort and edit opportunities by product, sales stage, probability, amount and estimated closure date.
- Copy opportunity list data into Microsoft® Excel® for further analysis and pivot table reporting.
- Configure additional data fields with date, drop-down lists and multi select option. Also adapt these opportunity fields to generate a history, make the fields mandatory, disable fields editing or change the field length.

Generate Quotes

- Create a quote from any opportunity without re-keying contact and opportunity information.
- Add your logo and terms to the quote template.

ACT! Forecasting and Reporting

- ACT! can generate over 40 reports including sales and pipeline reports as well as phone lists, activities schedules, contact histories, sales forecast and more.
- Run reports on individuals or multiple ACT! contacts / user records to assess performance.
- Customise reports or create your own.



MANAGE SHARED RESOURCES

- Manage key shared resources including meeting rooms, cars and IT equipment by checking their availability through ACT! and reserving them.

PROTECT CUSTOMER DATA

Control user access centrally

- Grant users access rights that reflect their status. ACT! supports up to 5 user security levels from read-only to full database administrator rights.
- Define password policies including password expiry periods, formats and re-use permissions.
- Apply field level security to restrict user and team access by granting "Read Only" or "No Access" to specific fields.
- Set custom user permissions to control which users can delete data, synchronise or export data to Excel®, ensuring consistent data security.
- Mark access to individual contacts as public, private or simply select which users/teams have access rights to which contacts.

INTEGRATION WITH SAGE PASTEL PARTNER

Accounting Link

- Integration with Pastel Partner creates an additional ACT! tab called Accounting, and displays information on the linked contact. The information includes the following; Terms, Balances, Outstanding Quotes and Back Orders.
- Import data currently in your Pastel Partner database into ACT!
- Link contact records between Pastel Partner and ACT!
- Update data both ways from Pastel Partner and ACT! on linked contact records. Fields include: Account No, Contact, Company, Record Type, Address fields, Phone fields, Email and 5 user defined fields.

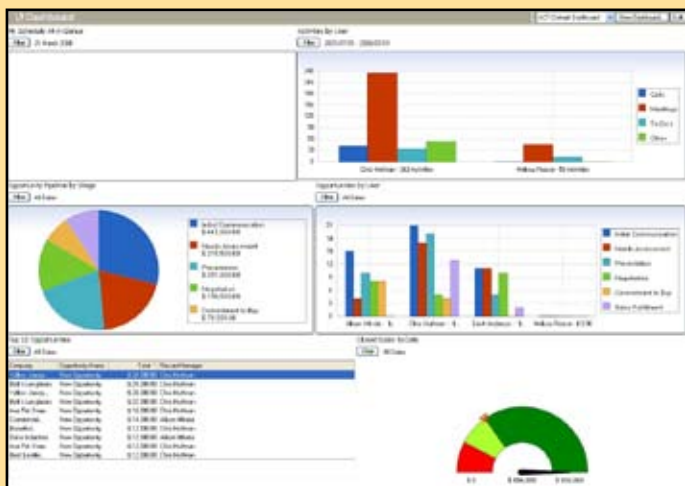
NEW

ACTIVITY AND OPPORTUNITY DASHBOARD

Get a bird's eye view of where you stand with customisable graphical dashboards which brings ACT! data to life.

See at a glance:

- Your activities for the day.
- Where sales opportunities stand in your pipeline.
- Your top business prospects.
- Sales performance against target.
- Integration with Pastel Partner creates an additional ACT! tab called Accounting, and displays information on the linked contact. The information includes the following: Terms, Balances, Outstanding Quotes and Back Orders.



MINIMUM SYSTEM REQUIREMENTS:

- ACT! by SAGE Pastel is licenced on a named basis. You must purchase 1 license per user.
- Client registration and license activation are required to use ACT! by Pastel.
- In a shared environment, ACT! by SAGE Pastel can accommodate up to a maximum of 10 users without the need for Microsoft® SQL Licenses. To share data with more than 10 users, you will need to purchase Microsoft® SQL licenses for each ACT! user.
- Using SQL Server technology, ACT! by SAGE Pastel requires a high level of IT expertise to configure and a professional implementation is strongly recommended.

Microsoft® Windows XP Professional (SP 2) • Server 2003 standard Edition • Server 2003 Enterprise Edition • 2003 Small Business Server Operating Systems • Microsoft® Windows Vista • Memory 1 GB RAM • At least 1GB available hard disk space • Minimum Pentium IV, 2GHz or higher•

ACT! WORKS WITH:

- SAGE Pastel Partner 2005 and up • Microsoft® Outlook® 2002/2003/2007 • Microsoft® Outlook® Express 5.5/6.0 • Microsoft® Office 2002/2003/2007 • Microsoft® Internet Explorer 6.0/7.0/8.0 • Adobe Acrobat Reader 6.0/7.0/8.0 • Eudora 5.2
- Palm OS handheld 3.5 - 5.4* Pastel Partner Multi-User Versions of 2005 or higher required* ACT! Network version required

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For more information contact your local Sage Pastel Business Partner
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