

Sage ACT! | Product Brief

Make contact. Build relationships. Get results.

Somewhere between the chaos of sticky notes and spreadsheets, and the complexity of CRM solutions lives an alternative for you—a Contact and Customer Manager. Imagine having all of your associated phone numbers, emails, meeting notes, and documents within reach for all of your contacts, and being able to find and update their information instantly.

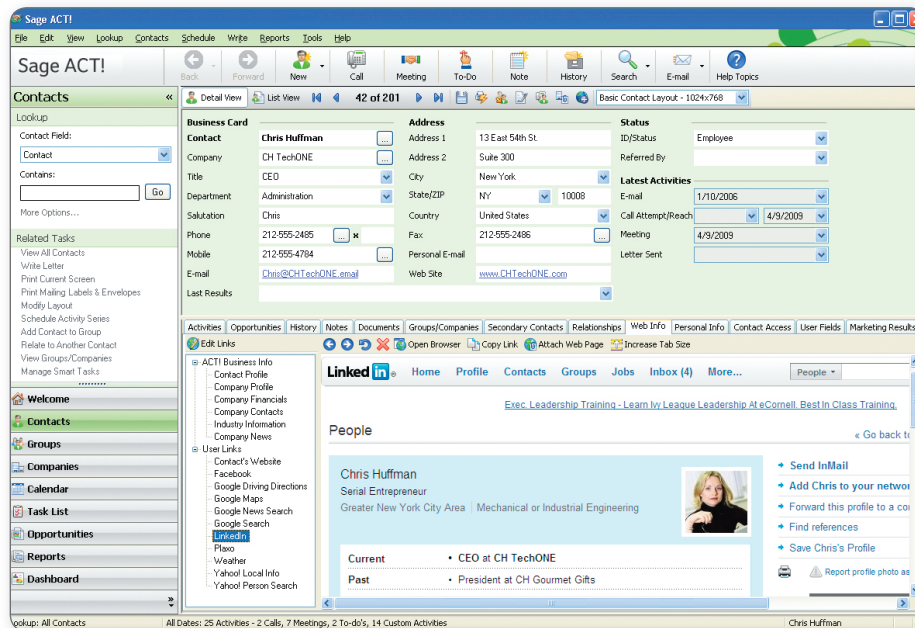
Engage in Meaningful Conversations with Customers

Sage ACT! is the #1 selling Contact and Customer Manager that enables you to have meaningful conversations with customers by giving you an organized view of the people you do business with.

Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place.

You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance.

The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.



- Manage relationships by keeping everything—contact details, emails, documents, social media profiles, and more—in one organized place.

BENEFITS SNAPSHOT

#1 in the world. Relax, you chose wisely. Sage ACT! is #1 selling with millions of successful customers.

Designed for you. Specifically for small businesses and sales teams like yours, that is. We focused on the features you'll actually use from day one—and into the future.

Easier than the rest. Sage ACT! leads the industry in ease of use. You can get 25 percent¹ more work done by using Sage ACT! over competitive solutions.

Priced for the cost-conscious.

You don't have to sweat about hidden costs popping up later or investing in a costly IT stack.

Personalizable. Tailor Sage ACT!

to fit your business even better. Design views, add fields and tabs, edit drop-downs, and customize templates.

CALL 1-866-903-0006

CONTACT YOUR SAGE ACT! CERTIFIED CONSULTANT* | VISIT WWW.ACT.COM

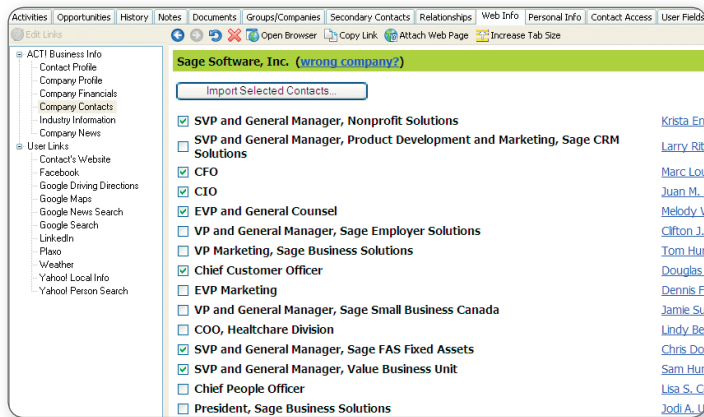
TEST DRIVE SAGE ACT! 2011 AT WWW.ACT.COM/TRY

Become Organized So You Are Instantly Prepared

Organize your information with Sage ACT! so you can zoom in on the details of your customer relationships whenever you need to. When customers call unexpectedly, you're instantly prepared with the email they sent you last week, notes from your last phone call, and their Facebook profile to see what they've been up to—all at your fingertips.

Unlock a Rich Source of New Leads

Attract new customers and get more from existing relationships using lead/business info² and e-marketing services² for Sage ACT!. With this enhanced functionality, you can unlock a rich source of new leads and send striking e-marketing campaigns to help turn your sales and marketing efforts into a focused, systematic lead generation and selling machine.



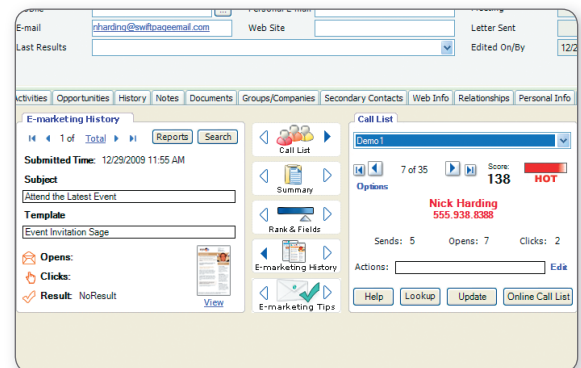
- Target key decision makers within a company and import selected contacts and their available information into your Sage ACT! database.

POWERED BY
HOOVERS[™]
A D&B COMPANY

To stay a profitable business, you want more customers that look like your best ones today, so use Sage Business Info Services for ACT!² to pull highly targeted prospect lists and business information from Hoover's[™] and put that data directly into Sage ACT!. It helps you fill in the gaps in your database and gives you access to more than 65 million companies and 85 million executives. Find new leads based on the traits you're looking for, along with business data for known contacts and companies, including profiles, financials, industry information, news, and more.

Jump-Start Your Marketing Efforts

Now add rocket fuel to your sales and marketing strategy with Sage E-marketing for ACT!², a cloud-based email marketing service that enables you to execute sophisticated campaigns, while leveraging and building on your existing Sage ACT! data. Capture additional leads with web forms on your website, nurture those prospects automatically with drip marketing plans, and quickly identify your hottest leads using a ranked call list that tells you which prospects are most interested.



- Market effectively to attract new customers and get more from existing relationships with end-to-end Sage E-marketing for ACT!.

"In sales for many years, I have over 13,000 contacts in my primary database. It has meant so much to my business to always have at my fingertips every conversation, kids' names, birthdays, and anniversaries when I haven't spoken to a prospect for a year. Without Sage ACT!, I would be lost in a sea of Post-it® notes. Oh, and I never miss an appointment or a phone call."

— John Burwick
Sage ACT! user since the start in 1987

Take Control of Your Sales Pipeline

Manage prospects through an out-of-the-box Sage ACT! sales process or a process that you personalize to fit your business. Keep detailed progress notes and see the probability of close for each opportunity. This gives you total visibility and control of your sales pipeline so you can stay in contact with those opportunities most likely to close.

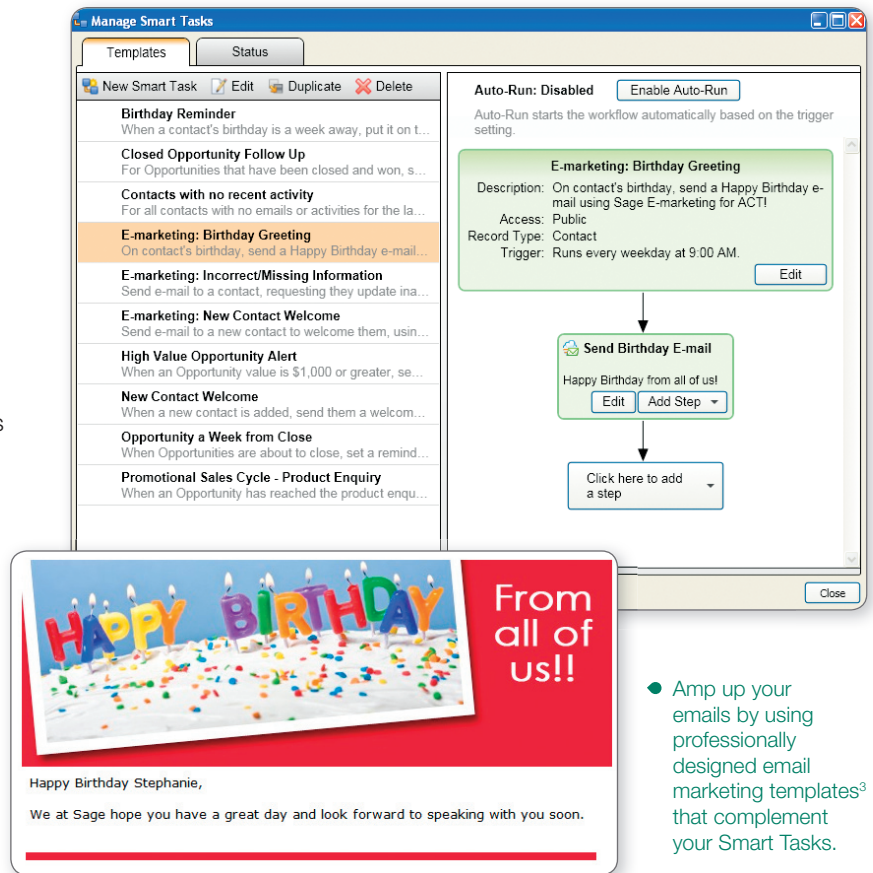
Get More Done on Any Given Day

Let Sage ACT! Smart Tasks handle the things you need to get done every day. Think of this as a personal assistant that puts activities on your calendar and sends emails for you. It doesn't matter whether your tasks have two or 10 steps, it's all automated so your customers get the service they expect, with little work required by you.

Get started with one of many sample Smart Task templates, and accompanying email templates, for the most common activities. These Smart Task templates will set in motion the most basic or advanced processes that allow Sage ACT! to remind you that it's your best customer's birthday, inform you of customers that haven't heard from you in a while, even welcome that new customer who just placed an order.

Access Sage ACT! Anytime, Anywhere

Get anytime, anywhere access with Windows® and web options, plus stay connected while out on the road with ACT! Mobile Live² which lets you access Sage ACT! from your BlackBerry® or Windows Mobile® device. You'll always have your Sage ACT! contacts, calendar, meetings notes, conversation history, and upcoming activities, because all of this is easy to find and update from your phone. No more missed meetings, misplaced phone numbers, or forgotten customer details simply because you're out of the office and away from your computer.



Manage Smart Tasks

Templates Status

New Smart Task Edit Duplicate Delete

Birthday Reminder
When a contact's birthday is a week away, put it on t...

Closed Opportunity Follow Up
For Opportunities that have been closed and won, s...

Contacts with no recent activity
For all contacts with no emails or activities for the la...

E-marketing: Birthday Greeting
On contact's birthday, send a Happy Birthday e-mail...

E-marketing: Incorrect/Missing Information
Send e-mail to a contact, requesting they update ina...

E-marketing: New Contact Welcome
Send e-mail to a new contact to welcome them, usin...

High Value Opportunity Alert
When an Opportunity value is \$1,000 or greater, se...

New Contact Welcome
When a new contact is added, send them a welcom...

Opportunity a Week from Close
When Opportunities are about to close, set a remind...

Promotional Sales Cycle - Product Enquiry
When an Opportunity has reached the product enqu...

Auto-Run: Disabled Enable Auto-Run

Auto-Run starts the workflow automatically based on the trigger setting.

E-marketing: Birthday Greeting

Description: On contact's birthday, send a Happy Birthday e-mail using Sage E-marketing for ACT!

Access: Public

Record Type: Contact

Trigger: Runs every weekday at 9:00 AM.

Edit

Send Birthday E-mail

Happy Birthday from all of us!

Edit Add Step

Click here to add a step

Close

From all of us!!

Happy Birthday Stephanie,

We at Sage hope you have a great day and look forward to speaking with you soon.

- Amp up your emails by using professionally designed email marketing templates³ that complement your Smart Tasks.

"Before Sage ACT!, we tried 3x5 cards, Post-it® notes, Microsoft Outlook—and I couldn't keep the records I wanted and I couldn't keep track of anything. Now, when I get a lead, I just pop it into Sage ACT! and I'm ready to go. Sage ACT! has incredibly increased the productivity of my business. If you're not using Sage ACT!, you're wasting your time, you're wasting your money, and you're not building the relationships you need."

– Linc Miller, Managing Partner, Sandler Training
Sage ACT! user since 2007

Get Web Access and Added Team Functionality

Consider Sage ACT! Premium, designed for teams who need to efficiently share relationship details. Sage ACT! Premium gives you and your team access to a central database from Windows® and the web so everyone is completely in sync. Plus, it has team features such as enhanced security, group dashboards and reports, and advanced administration.

With Sage ACT! you can:

Manage Relationships	Keep everything—phone numbers, emails, conversation notes, meeting and activity history, documents, social media profiles, and more—in Sage ACT!.
Search and Instantly Access	Find the exact customer relationship details you need using the most basic keyword search to a more advanced field search.
Be More Productive	Work more efficiently with Smart Tasks that automate key activities like sending emails for you and putting activities on your calendar. Get started with one of 10 pre-loaded Smart Task templates ³ or simply customize your own version.
Unlock New Leads	Obtain leads you can use with Sage Business Info Services for ACT! ² that pulls highly targeted prospect lists and business info from Hoover's™ and puts them directly into Sage ACT!.
Market Effectively	Create and send email and drip marketing campaigns, track open and click-through rates, and manage opt-outs with Sage E-marketing for ACT! ² .
Sell More	Track each lead through the sales process where you can capture detailed progress notes, include your products and services, and see the probability of close.
Measure Results	View 50+ reports and dashboards, or for deeper analysis, send most reports to Excel® and use connections to third-party report writers.
Integrate with Existing Business Solutions	Take full advantage of familiar solutions you've already invested in, including Microsoft® Outlook®, Word, Excel, and Lotus Notes®—over 10 business solutions in all.
Eliminate Double Entry	Integrate your Sage ACT! and Outlook contacts and eliminate double entry, plus keep your calendars in sync—no matter where changes were made.
Personalize Sage ACT!	Tailor Sage ACT! to fit the way you run your business by designing views, adding fields and tabs, editing drop-downs, and customizing templates.
Access from Anywhere	Get anytime, anywhere access with Windows® and web options, plus stay connected when you're out of the office from your BlackBerry® or Windows Mobile® device with ACT! Mobile Live ² .
Administer and Maintain	Use Silent Install ⁴ administration and activation, and take advantage of automatic backup, maintenance, and synchronization options.

Important Note:

Sage ACT!: You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Review Sage ACT! system requirements at www.act.com/2011systreq. Visit www.act.com/solutions or contact your add-on product provider to determine compatibility for your add-on products. Sage ACT! 2011 now supports Firefox® 3.5 and 3.6 and 32-bit version of Microsoft Office 2010! **Sage Connected Services for ACT!:** Review ACT! Mobile Live system requirements at www.act.com/mobilesystreq. Sage E-marketing for ACT! is powered by Swiftpage™. Import functions for Sage Business Info Services for ACT! must be performed on the web server when using Sage ACT! Premium (access via web).

¹ Based on a Keystroke Level Modeling competitive study conducted by Sage and Measuring Usability, LLC in May 2009. Competitors included Microsoft Dynamics® CRM and Salesforce.com.

² Requires additional subscription.

³ Three Smart Task templates require a subscription to Sage E-marketing for ACT!.

⁴ 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. Silent Install is only available in Sage ACT! Premium.

*Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and mid-sized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.