

POWER TO RUN YOUR BUSINESS

sage

ACT!



Powerful contact and customer management for your business



"We are now confident that all hot leads are followed up and can pinpoint at any time where we need to be investing additional sales and marketing effort to meet our targets. I must say that ACT! has changed all our working lives here at Your Space dramatically for the better."

Claire Dyson, Sales & Marketing Director, Your Space (UK) Ltd

Introduction

In today's competitive business arena, it's essential that every part of your business is as effective as it can be. Contact and Customer management embraces the very core of your business – your customers and how you deal with them. Throughout the course of a typical day, you communicate with a number of business associates, establishing, building and managing those relationships are vital to your business. Dealing with customer queries effectively, maintaining accurate contact records, implementing a proven sales process system, planning and managing communications are all part of good customer management.



Making Customer Relationships your Business

With our ACT! product range Sage provides more small and medium sized enterprises with contact and customer relationship management solutions than any other company in the world. As part of The Sage Group plc, significant technical and support resources as well as financial strength of a FTSE 100 company back up our product range. A robust position in the market place ensures that customers are entering into a partnership, which will continue to nurture and support their growth for many years to come. It also allows Sage to focus on delivering forward thinking solutions designed to meet the needs of companies like yours.

ACT! connects your people, processes and technology to deliver the highest levels of customer service to your customers. It involves a variety of activities, including the ability to:

- n Manage all the details related to your contacts, such as address, phone numbers, e-mail, websites, notes, correspondence, documents, to-do items and activities
- n Communicate and effectively follow up with your contacts by telephone, mail and e-mail
- n Send personalised correspondence to your contacts
- n Schedule appointments and to-do items
- n Maintain accurate records of all your interactions with contacts
- n Generate reports for reviewing activities
- n Forecast and track sales opportunities to improve results

How can ACT! improve your business?

Target New Prospects

You can use ACT! to easily analyse historical sales trends, understand the profile of your best customers and, using this information plan effective marketing and sales campaigns.

Generate Leads

ACT! is a comprehensive tool for marketing, you can quickly and easily use existing information or import bought-in data for direct mailshots, faxshots and e-mail communications. For example, select groups of prospects you wish to mailshot and, with the superb integration with Microsoft Word and Outlook, create an effective direct mail campaign including html e-mails.

Convert Leads to Sales

With its own built in sales process system or by designing your own system you can track all communications with the prospect, ensuring maximum service levels are maintained through the sales cycle and business is closed quickly and efficiently. Built-in reporting improves accuracy of sales forecasts for a single team member or the whole sales team.

Improve Customer Relations

ACT! automatically tracks all communication with your customers including mailshots, letters, meetings, phone conversations and, when linked with Sage Instant Accounts, Sage Line 50, Sage Line 100 or Sage MMS, also provides essential financial information. This ensures a professional interface with your customer and lays the foundation for a long-term relationship and additional sales.

Choosing the Right Solution for your Business

	ACT! 6	ACT! Professional	ACT! Professional for Workgroups
Typical user/Business requirements:	Selling professionals and small teams selling to small data sets of individuals not companies. Limited business analysis. Self install so no specialist IT skills needed.	Selling professionals and small teams selling to companies and not individuals, with medium volumes of information. Companies who require more business analysis. Self install so no specialist IT skills needed.	Corporate workgroups and large sales teams selling to companies and not individuals, with large volumes of information. Companies who require in-depth business analysis, customisation and integration with other business software. IT skills needed within company.
Number of users:	Typically 1-5	1 -10	5 +
Number of records:	25,000	50,000	100,000
Database:	Proprietary	SQL Server 2000 Desktop Engine	SQL Server 2000 Standard Edition
Operating systems:	Windows 98 and above	Windows 2000 and above	Windows 2000 and above

Detailed specification is available on request

Benefits of using ACT!

Who will benefit from Contact and Customer Management Software

Contact and customer management software is designed specifically for relationship-driven professionals and has long been a weapon of successful salespeople. However, any individual, workgroup or corporate team that needs to improve professional relationships can benefit significantly from contact and customer management.

How does Contact and Customer Management Differ from Other Solutions

A variety of products are available to help business people deal with contacts and the details related to those relationships – from paper based calendars and phone lists, to handheld devices to software. At the high end is CRM; at the other end are Personal Information Managers (PIMs).

PIMs typically provide only a fraction of the relationship management capabilities of ACT! While ACT! tightly integrates all the information related to your contacts, a PIM typically includes only a basic address book, calendar and to-do list in this regard. In addition ACT! allows you to access

comprehensive information about your contact relationship in multiple, integrated ways, so you don't have to jump from module to module to plan your day or your sales strategies.

Easy Customisation that Works the Way You Do

Unlike many products that make you switch your way of doing things, you can tailor ACT! to match the way you conduct your business. In addition to customising field labels and types, you can also customise screen layouts to create the look and feel you want, ranging from simply adding your corporate logo to the background of all views, to custom tailoring every view.

Creating and Sending Personalised Letters and E-mail

Use ACT! to create quick and easy personalised correspondence, including mail merge letters, e-mail, envelopes and mailing labels. ACT! links all of your correspondence to the associated contact for a complete record of everything that has been sent and received. For professional e-mail marketing, ACT! creates professional looking HTML templates.



"ACT! has dramatically changed the effectiveness of our CRM activities. It facilitates communication both with our clients and internally, cuts down on paper and provides discipline for the sales team in managing their daily tasks."

Gill Smillie, Marketing Manager, Conference Centres of Excellence

Instant Access to Contact and Customer Information in One Place

ACT! stores complete information and provides instant access to all your contact and customer details. In addition to tracking standard information, such as name, company, phone numbers, addresses and e-mail addresses, ACT! also allows you to enter virtually unlimited, date and time-stamped notes for each contact, complete with text formatting to add emphasis where needed. The ACT! Professional range also includes Company records which give you an “account view” of all your relationships and interactions with an organisation.

Staying on Top of Your Schedule and To-Do Items

With ACT!, you can quickly and easily schedule calls, meetings and to-do items; and then view and print your schedule by day, week, work week, month or multiple months.

Even recurring events can be scheduled in one easy step. With ACT!, you can set alarms to be reminded of important events. Using the Task List view, you can filter your calls, meetings and to-do items by priority, date range or user, even displaying totals for each activity type.

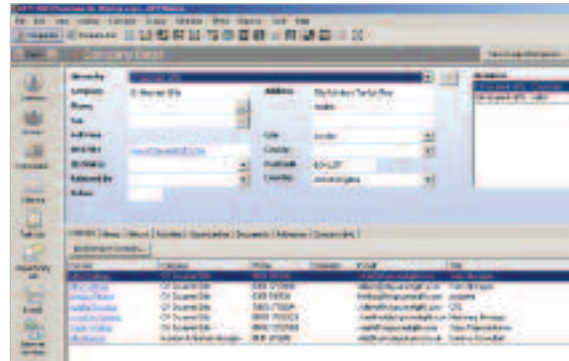
Scheduling activities, individually or for your workgroup, is easy. In ACT! Professional for Workgroups, ACT! displays the availability of your team at a glance, including private activities, which simply display as “busy.” When you schedule a group activity, a notification appears on each team member’s status bar.

Meeting Your Sales Goals

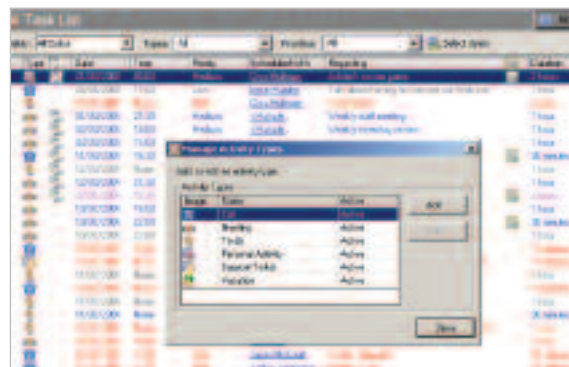
Managing your sales pipeline and a sales team strategy is easy using the built-in ACT! sales opportunity tracking and forecasting tools. You can view all opportunities at once, and then filter by estimated close date, sales stage, amount, probability of close, etc. Analysing your sales pipeline couldn’t be easier – ACT! even has an interactive graphical Sales Pipeline Report, which allows you to drill down to see details.

Reporting

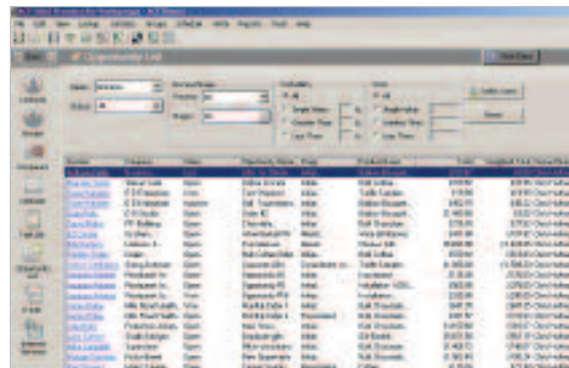
ACT! includes many standard reports such as phone lists, activity reports, and sales reports, or you can easily customise reports to summarise and analyse your contact data any way you like. With ACT! Professional you can export list views and groups to Microsoft Excel for further analysis. Reports can also be exported into HTML, PDF, e-mail and more.



Store complete information and provide instant access to all customer details.



Easy to use scheduling ensures you keep on top of your to-do items and meetings.



Track your sales opportunities with ease, using the built-in forecasting tools.



Manage your business and contacts more effectively with helpful analysis of your sales pipeline.

ACT! Working with Microsoft Software

Microsoft Outlook

ACT! provides integration of its extensive contact management features with Outlook. ACT! imports contacts directly from Outlook, so there's no need to re-enter your contact information. ACT! integrates with your Outlook calendar, so you can view activities scheduled in Outlook from ACT! and vice versa. ACT! also integrates with Outlook e-mail so you can access your Outlook Inbox and other folders from within ACT! to track e-mails sent and received for every ACT! contact.

Microsoft Excel

Integration with Microsoft Excel means you can sort all your opportunities by sales representative, close date, sales potential, sales stage or region - in fact you can create a group with any field in the database. This data can then be easily exported to Excel with just 1 click for more in-depth analysis of all opportunities.

Microsoft Word

Seamless integration with Microsoft Word means it's easy to stay in contact with your customers and prospects. Simply select one of the Word templates created by your marketing department, and it will automatically be personalised with the name and company information. There is now no need to search through your sent items folder and cutting and pasting information sent to old customers. It not only sends the mail but records it to history and lets you set a follow up call for the future.

ACT! integrates with Sage Accounting Software†

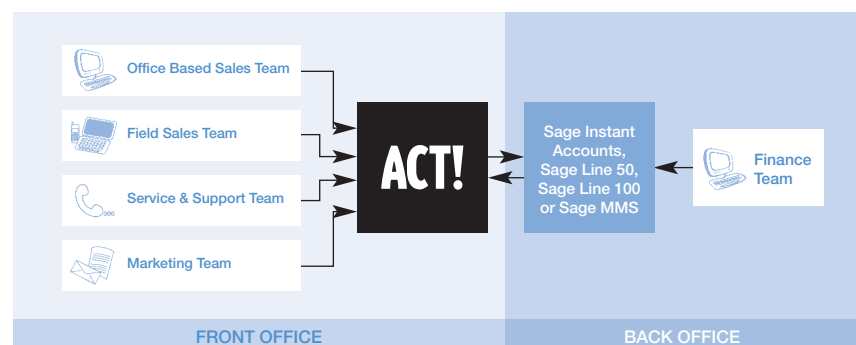
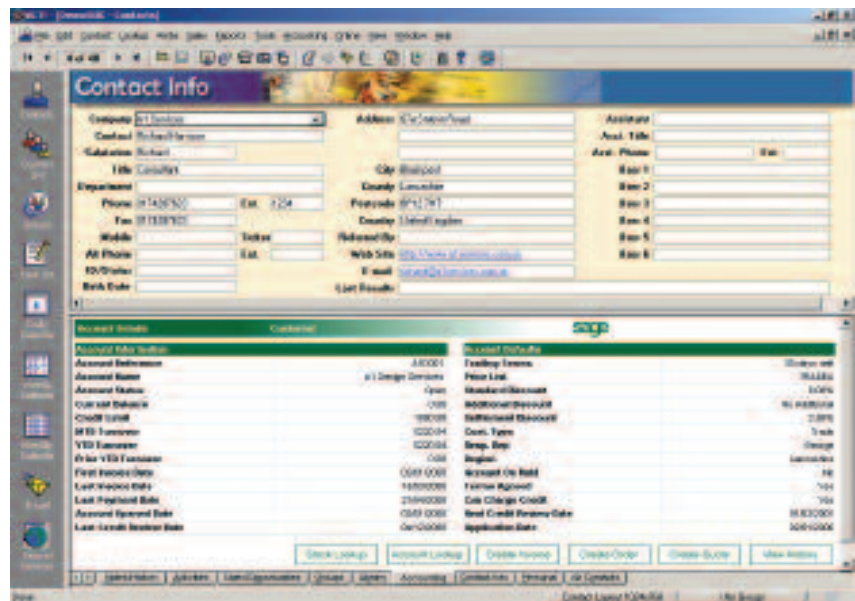
To unite your front office (customer facing employees) and back office (accounting and admin employees) solutions, ACT! Link software is available to integrate ACT! with Sage Accounting Software such as Sage Instant Accounts, Sage Line 50, Sage Line 100 or Sage MMS. Offering your business an integrated front and back office system developed and supported by Sage.

The integrated solution provides the "big picture" where all the relevant sales, marketing and financial information for any contact or customer is available at the click of a button. Data can be initially transferred from the existing sales ledger into the ACT! database. Then through the accounting menu and tab, financial data can be displayed in the contact record. Credit limit, sales to date and outstanding debt information as well as trading terms and discounts available are displayed. Transactional information such as invoice numbers, details and amounts owed and paid can also be shown.

ACT! 6 Link for Instant Accounts

ACT! 6! for Line 50/100/MMS

ACT! Professional Link for Instant/50/MMS



† ACT! Professional range links are due to be released Summer 2005

ACT! Mobile Range

Synchronise with Palm OS and Pocket PC Handhelds

The ACT! product range has been extended to bring you four mobile products that will provide you with all the tools to perform even better in business:

ACT! Link for Palm OS

ACT! Link for Pocket PC*

ACT! for Palm OS**

ACT! for Web**

ACT! for Palm OS and ACT! Link for Pocket PC and ACT! Link for Palm OS, will allow you access to your valuable ACT! data whilst off-site or on the move. ACT! for Web harnesses the power of ACT! and makes it accessible to you anytime and anywhere. With ACT! for Web, entire workgroups can access, update and share complete customer information in real time using your internet browser.

* ACT! Link for Pocket PC is available for ACT! V6 and ACT! Professional range

** ACT! for Web and ACT! for Palm OS is available for ACT! V6 only

ACT! Support and Services

SageCover

We know that customer care and support forms a major part of the product buying process. One of our aims at Sage is to ensure that we maximise customer satisfaction across our ACT! customer base. Our technical support team are here to ensure that you get the highest value from your ACT! solution.

To ensure that ACT! fulfils all your business needs we have developed a comprehensive support service for the ACT! product range in the form of SageCover. With SageCover, you can simply call to speak directly to one of our dedicated ACT! experts. They can help you with the smooth operation of your ACT! system, leaving you to focus on your customers and your business.

Training

Sage offers a wealth of training courses at locations throughout the UK. Our training helps you and your staff to master your ACT! software quickly – letting you focus on running your business.

ACT! Business Partners

Sage has an extensive network of ACT! Business Partners located throughout the UK to provide local consultancy, implementation, customisation and on-site support for your ACT! solution. They exclusively sell our ACT! Professional range of products.

To discover how ACT! can help your business grow or to gain more indepth information in the product range call 0845 245 0276 to purchase ACT! or to find out where your nearest ACT! Business Partner is located, or visit www.sage.co.uk.

Your ACT! Business Partner



For more information on ACT!

ACT! SALES	0845 245 0276
REPUBLIC OF IRELAND	0800 255 300
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POWER TO RUN YOUR BUSINESS



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