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Celebrating 20 Years

In 1987, ACT! broke new ground for business professionals looking to manage contacts and activities, build key relationships, and drive results. "Contact Management" software was born. Over the years, ACT! continued to evolve while remaining #1 in the industry. Today, ACT! by Sage has more than 2.7 million individual users and 38,000 corporate accounts in 25 countries.

**Are You
Missing Out?**

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Introducing ACT! by Sage 2008

ACT! by Sage 2008 (10.0) was recently released offering new features and functionality. In this article we'll review the new Interactive Dashboard and the other features of this release designed to boost your productivity, protect the integrity of your data, add new functionality to the Groups feature, and ease the administration of securing your data.

Interactive Dashboard

Our work days are busy with many tasks to manage. There are calls to make, meetings to attend, to-do items to complete, and leads to follow. ACT! has always done a great job of reminding you when tasks are due. Now, with the interactive Dashboard you can see and manage tasks, review opportunities, view your calendar, and other data important to you from one location.

You can set a Dashboard as your startup view to begin each day with a snapshot of activities that require your attention, and track your progress, or your team's progress, against company goals and key performance indicators.

The Dashboard feature consists of six components that you bring together on a single screen and tailor to meet your needs. With

the Dashboard you have a comprehensive view of the information you care about most. The Components are: **Schedule At-A-Glance**, **Activities by User (My Activities)**, **Opportunity Pipeline by Stage**, **Opportunities by User (My Opportunities)**, **Top 10 Opportunities**, and **Closed Sales to Date**.

Note: The naming conventions vary slightly between the versions; in this article we use the naming associated with ACT! Premium while placing the ACT! naming in parenthesis.

For each component, a Filter function is available allowing you to fine tune the information displayed. For example, you could filter the Schedule At-A-Glance component to show only meetings or only high priority tasks. You can drill down into each Dashboard component to

gather more detail or to take action on any activity or opportunity immediately. You can copy any Dashboard component or the entire ACT! Dashboard to Microsoft Office applications for use in your e-mail messages, reports, and presentations. Where applicable, the information is presented in graphical form to make it easy to understand at a glance.



ACT! 2008 adds features and tools that save steps and keep the information you care about close at hand.

Compliments of:



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Introducing ACT! by Sage 2008 CONTINUED

Here's a detailed look at each of the six default Dashboards and the information they provide.

Schedule At-A-Glance

The Schedule At-A-Glance component gives you a list of the day's activities including the activity type and time. As you mouseover each activity, a calendar pop-up appears offering more detail on that particular activity.

Activities By User

Display all calls, meetings, to-do's, and custom activities, for a date range you specify, with the Activities by User (My Activities) component.

Use either a bar or pie chart to see a visual representation of how your time, or your team's time, is allocated. As you mouseover any Activity Type, you'll see a count of the number of activities associated with each Activity Type.

Opportunity Pipeline By Stage

The Opportunity Pipeline By Stage component includes the total and weighted total associated with each stage for the date range and status you specify. Choose a pie or bar chart to see how your opportunities are tracking, whether you are using the ACT! Sales Process or a customized sales process you have configured. Mouseover each stage and receive a count of the opportunities associated with that stage. Managers may view potential revenue associated with each stage for their entire team and can even drill down and view data for a specific team member.

Opportunities By User

You can customize the Opportunities By User (My Opportunities) component to see opportunities by date range including 30 days, 60 days, or 90 days. Or you can view open or closed opportunities you've won, closed opportunities you've lost, and inactive opportunities. This view shows your sales opportunities in either a pie or bar chart by total and by weighted total. Managers may view potential revenue associated with each stage for their entire team or for a specific team member.

Top 10 Opportunities

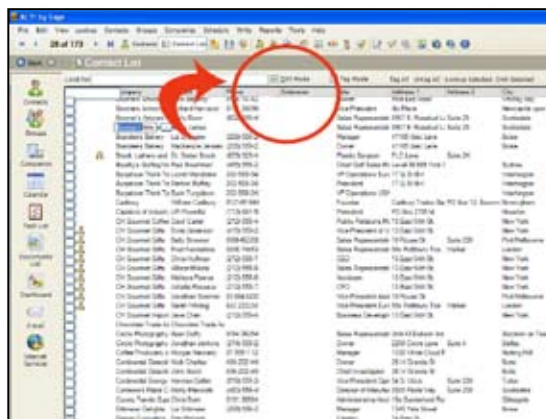
When you want a quick look at your top sales opportunities, the Top 10 Opportunities component delivers. Filter for a specific date range or status, or sort each column in the list by name, total, company, and more. You can drill down and take further action on any opportunity, adding details, scheduling a follow-up, or moving it through the sales process.



The new ACT! Dashboard delivers the information you rely on during your business day.

Closed Sales To Date

The Closed Sales To Date component shows you all closed sales to date, including the total and weighted total for all closed sales opportunities. Filter for a specific date range or status to provide the information you want. A graphical gauge, pie, or bar chart allows you to see how you or your team are tracking towards



When you check the new Edit Mode box from a list screen you can edit the record directly from the list—without the need to open the record.

the opportunity goals. You also can specify the targets to track your progress against.

Design Your Own Dashboard

The new Dashboard Designer allows you to customize any of the six default Dashboards and even create new Dashboard components. Managers and administrators can add or remove ACT! dashboard components, change titles or legends, and utilize drag-and-drop functionality with the Dashboard Designer to easily customize any default dashboard or create new dashboard components.

Note: In ACT! Premium for Web, customizations must be performed on the Web server.

Productivity Boosters

In the course of your work day, every step saved boosts your productivity. ACT! 2008 adds several productivity boosters you'll want to incorporate into your daily work flow.

List Edit Mode

With the List Edit feature you can edit fields within a Contact, Group, or Company list view. When you mark the new Edit Mode check box on the list screens, you are able to edit records in the list directly from the list view.

Change phone numbers, addresses, correct a misspelling—all without having to recall the contact record. Note: this feature is not available in ACT! Premium for Web.

Multiple Contacts Per Opportunity

You now can assign more than one Contact per Opportunity, so all decision makers associated with a sales opportunity can be tracked. Users can view all Contacts or products associated with an Opportunity from a list view without having to open the Opportunity—simply mouseover an Opportunity and additional information for that Opportunity appears in a new window.

Document Shortcuts

Now you can add shortcuts to your documents to Activity and History items without the need to attach the full document. This helps control the size of your database, allows documents to be edited outside of ACT!, while ensuring the most updated version is available by way of the

shortcut in the ACT! database. Note: this feature is not available in ACT! Premium for Web.

Duplicate Checking

ACT! 2008 includes a more powerful duplicate checking function. As a new Contact record is entered, ACT! will automatically check for duplicate first and last names. When a duplicate record is found, you'll receive a prompt informing you of the duplication and providing the option to continue or cancel the entry.

Similarly, ACT! 2008 automatically checks for duplicate Groups and Companies when entering these entities as well. For even more robust duplicate record checking, you have the option to set and define duplicate record checking criteria for up to three fields.

Enhanced Group And Company Features

With ACT! 2008 you can label subgroup and division names within Group and Company records with the same name for improved organization and data accuracy. For example, multiple companies with the same division or department name, such as Sales, now can have the same division name for multiple Company Records.

ACT! 2008 also makes it easier to view the entire hierarchy of all Group and Company records, including subgroups and divisions. Whenever a Group or Company dialog box is displayed, such as when adding contacts to a Group, you'll see the full hierarchy so you can easily understand which subgroup and division is associated with which parent Group and Company records. Note: This feature is not available in ACT! Premium for Web.

With the expanded ACT! search capability you can perform Advanced Queries on Group and Company records to find specific information more easily. Save your query and easily redefine the search criterion for future searches to save time.

Security And Data Integrity

Administrators can control data security by: limiting user or team access to any group or company record; determining which users can view and/or edit group and company data; and lim-

iting access to any new groups and companies created based on pre-set security preferences.

Administrators can also temporarily suspend a remote database from synchronizing to the parent database to protect unwanted data or deletions from affecting the parent database, and helping administrators to diagnose a potential synchronization problem or issue.

Add-On Solutions

More than 60 ACT! add-on solutions are available for the new ACT! 2008 product family. ACT! add-on solutions complement and expand ACT! functionality by offering innovative productivity tools that simplify sales, marketing, financial, project management, reporting, mapping, shipping, and mobile device synchronization tasks, among other key business activities. All ACT! add-on solutions are reviewed by Sage Software to ensure they integrate with ACT!. Call us for a complete list of ACT! add-on solutions and pricing, or visit www.actsolutions.com.

ACT! Versus ACT! Premium

Please note that certain features vary slightly between the ACT! by Sage product and ACT! Premium and ACT! Premium for Web. Most significantly as it relates to this release, the ACT! Premium and ACT! Premium for Web dashboards allow team members to track their individual activities and opportunities, while also allowing managers to track group performance.

Contact us to learn more about the specific differences between the offerings, and to learn if ACT! Premium 2008 is the solution for your organization.

Vista Compatibility

ACT! 2008 is compatible with Microsoft Office 2007 and Microsoft® Windows Vista™.

Available Now

ACT! 2008 is available now. You may already be thinking of ways the new ACT! Dashboard can be put to use in your organization. We'd be pleased to show you more of ACT! 2008, and provide upgrade pricing, installation, and training—give us a call. ★

How To Add An ACT! Address Book In Outlook 2007

1. Launch Microsoft Outlook.
 2. Click the Tools menu, then click *Account Settings*. The Account Setting—E-mail Account window opens.
 3. Click the *Address Books* tab. The Account Settings—Directories and Address Books window opens.
 4. In the Directories and Address Books window, click *New*.
 5. The Add New E-mail Account—Directory or Address Book Type window opens. Click *Additional Address Books*, and then click *Next*.
 6. The Add New E-mail Account—Other Address Book Types window opens. Click *ACT! Address Book* and click *Next*.
 7. The Address Books dialog box opens, click *Add*.
 8. The Add/Edit Address Book dialog box opens. Click the *Browse* button (to the right of the ACT! Database box) and select the database that you would like to specify as an address book in Outlook. Enter the correct user name and password (if applicable) and click *OK*.
 9. Once the address book has been added successfully, you'll receive a message that Outlook must be restarted for the changes to take affect. Click *OK* (this will not restart Outlook for you, it is simply an advisory message).
 10. The Address Books dialog box appears and shows the ACT! database that you chose to add to Outlook. If you would like to add additional address books, click *Add* and repeat steps seven through nine. You have the ability to add up to three address books. When you are done, click *Close*.
 11. The Add E-mail Account dialog box will appear, click *OK*.
 12. Restart Outlook and you're finished.
- Important Note: To ensure that the preceding changes in Outlook take place, both Outlook and ACT! by Sage must be closed and restarted after the changes are made. ★



In The Spotlight: ACT! by Sage Are You Missing Out?



If you're still running an earlier version of ACT! by Sage, you're missing out on dozens of new features and broad new functionality. Here's a quick overview of what you can expect when you upgrade from ACT! by Sage Premium 2006 for Workgroups, ACT! by Sage 2006, or ACT! 2004 to ACT! 2008.

What's New For ACT! Premium 2006 Users

In addition to the great new features we detail in this newsletter, you'll also benefit from functionality such as direct integration with Microsoft Outlook e-mail, automatic Outlook Calendar synchronization, a Last E-mail Communication field, split-panel note preview, advanced keyword search, field-level security required by teams, among others.

Upgrade to ACT! 2008 and receive:

- ▶ Integration with Outlook e-mail
- ▶ New interactive Dashboard with comprehensive, graphical representations of key information
- ▶ Improvements to search functionality for easier look-ups
- ▶ Usability enhancements to common features for improved efficiency
- ▶ Improvements to sales opportunity tracking for greater visibility
- ▶ Improvements to Group and Company management for easier tracking
- ▶ Easier database maintenance and security improvements

What's New For ACT! 2006 Users

In addition to the features we detail in this newsletter, you'll also benefit from functionality such as direct integration with Microsoft Outlook e-mail, Last E-mail Communication field, advanced keyword search, and split-panel note preview.

Upgrade to ACT! 2008 and receive:

- ▶ Direct integration with Outlook e-mail
- ▶ New interactive Dashboard with comprehensive, graphical representations of key information
- ▶ Improvements to search functionality for easier look-ups
- ▶ Usability enhancements to common features for improved efficiency
- ▶ Improvements to sales opportunity tracking for greater visibility
- ▶ Improvements to Group and Company management for easier tracking

What's New For ACT! 2004 Users

In addition to the points outlined above, and the many new features we mention in the main article of this newsletter, you'll also benefit from significant new functionality, including separate Notes and History tabs, the ability to create Company Records, five different calendar views, an opportunity list view, and 20 re-designed sales reports.

Additionally, the ACT! product family has grown to include ACT! by Sage Premium solutions. These solutions offer scalability to accom-

modate large teams of users, advanced opportunity tracking and reporting, advanced security options, centralized administration, and much more.

By not upgrading to ACT! 2008 or ACT! Premium 2008, you are not only missing out on over 75 great new and improved features, you're using an unsupported version of ACT!. This means you no longer have access to product updates or support from Sage Software.

Upgrade to ACT! 2008 and receive:

- ▶ Company records
- ▶ Separate Note and History Tabs
- ▶ Ability to share Notes and History between Contacts
- ▶ Ability to attach documents to Activities and History
- ▶ Graphical sales pipeline with drill-down capability
- ▶ Customizable Priority, History, and Activity types
- ▶ ACT! E-mail find
- ▶ Much, much more!

We'd like to tell you more about ACT! 2008 and help you decide on the edition that's right for you and your business. Please give us a call. ★



Dynamic Business
Solutions, Inc.

1035 Hinesburg Road
South Burlington, VT 05403

(802) 383-1600

info@d-b-s.com

www.d-b-s.com

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