The New Act! Premium

Know Your Customers. Propel Productivity. Make Insightful Decisions.

A multitude of product innovations, feature enhancements, and business-critical services have been introduced since your version. Check out what you could be doing with a subscription to Act! Premium to propel your sales and marketing success.

Act! Premium v18

Advanced subscription management and easy access to the newest features and updates available for Act!

Compatible with Windows® 10, Office 2016, and Chrome™ and Internet Explorer® 11 browsers

Act! emarketing and Call List improvements including advanced administration for user roles, and new filters for Call Lists

Web API platform enabled, allowing for meaningful connections to business productivity tools

Fresh, modern look for Act! Premium for Web

All-new Act! Premium Cloud Trial includes the ability to upload and add your own data to your own secure database – no downloads or installs needed

Act! v17

Enhanced Act! emarketing including Team access, Lead Capture, Call List[3] functionality, and new Smart Task automation

Productivity enhancements such as new Outlook® sync options and integration with popular business tools

Streamlined configuration, deployment, and access options

Customizable big buttons, Act! Notifications, and default History options

Updated icons and easier access to resources, tools, and add-ons

Act! v16

Integrated Act! emarketing

Contact Timeline

New calculated fields

Streamlined company management and global actions

New History view

Act! Premium Mobile enhancements

Usability and system improvements like global activity rescheduling, proactive system alerts, and streamlined field and layout configuration

Act! Marketplace add-ons

Sage ACT! 2013

Sage ACT! Premium Mobile with Opportunities

Social updates

Offline Smart Tasks[1]

Smart Tasks with data/field triggers[2]

Optimized download and install experience

Usability improvements based on customer feedback

New wizards for remote database moving and sharing

● Unsupported version. Not available for loyalty pricing.

● Not available for loyalty pricing after 9/30/16

1 Subscription-based emarketing steps will not run offline. 2 Data/field triggers are only available in Contact & Opportunity entities. 3 Additional fee required.

Important Note: Review Act! system and browser requirements at act.com/systreq. Act! product capabilities and pricing vary based on edition and services chosen; view KB #37914 to learn more. Act! Premium Mobile requires set-up and configuration of Act! Premium (access via web). Data access available via active internet connection from supported device browsers. You are responsible for all data-related charges. Basic Act! emarketing account included (email up to 500 contacts per month). One license is required for each Act! user. View membership details at swiftpage.com/billing-policy.

621 17th Street, Suite 500 | Denver, CO 80293 | (866) 873-2006 | act.com

Act! Premium Feature Additions

Act! v17

- Updated icons, layouts, Welcome page and color schemes through Act!.

- Preferences can now be set and shared by Administrators globally rather than just individually.

- "Hide users" administrative feature hides inactive Act! users from report filters, view filters, dropdowns, scheduling wizards, etc. (cleaner user experience).

- New "Browse only" Act! user feature allows up to 10 Act! Pro additional users and unlimited Act! Premium and Premium for Web users to view an Act! database. "Browse only" users can search and view data in the database but cannot make changes, edits, or data exports.

- Additional new Act! Administrative Tools improve Act! system configuration and greatly improve silent installs.

- Users can now send (push) Act! Contacts and Activities to Outlook® Contacts list and Calendars (one way) with a manual command or automated sync (2-way already possible, now 1-way has been added).

- New integration with services like Dropbox, iCloud®, and other cloud based storage providers.

- Compatible with Internet Explorer® 11 browser.

Act! v17 cont.

- Act! emarketing updates include: a free Basic account (send unlimited emails to up to 500 contacts per month) for every Act! user, new Team accounts that allow for multiple users to access and share a single emarketing account, an updated dashboard showing campaign results and Call Lists (Call Lists require additional fee), new icons and shortcuts to help users manage individual and Team emarketing efforts, and now integration with Smart Tasks to automatically send email campaigns based on user-defined triggers.

- Additional Act! emarketing Call List improvements (added in v17.1) include History or Activity creation for a single contact, multiple contacts, or entire Call List. Also includes the ability to create a lookup of contacts on Call List in Act! and the ability to delete a Call List.

- Additional filtering functionality added to the Contact Timeline.

- mprovements to the Act! contact access feature now can be determined by automated process using Act! Smart Tasks.

- Act! Premium for Web improvements include the ability to create and distribute remote databases and offline clients, and import new contacts seamlessly using CSV files.

Act! v17 cont.

- Act! Premium Mobile updated with new layout and icons, plus the ability to attach photos to Contact History from your mobile device.

- New Documents tab features gives users the ability to attach a folder link (either local or online) and its contents to document tab. Click the link and folder contents can be opened and viewed from within Act!.

- Enhancements to Act!-Outlook integration logging (contacts/calendar sync) with minor updates to improve stability for all supported Outlook versions.

- Improved visibility on large/high-resolution screens and tablets.

- Improved management of URLs under Web Info tab now allows user the ability to share URL links created within a Contact's Web Link tab with other Act! users.

- New customizable big buttons in navigation (Global toolbar) – users can add/remove buttons, hide buttons, or change button order.

- Improved field creation allows ability to create a field dropdown while in the Define Field feature (without having to exit the wizard).

- Duplicate checking settings (merge options) now viewable within the import wizard.

Act! v17 cont.

- Act! Administrator notifications allow administrators to easily message all users of their Act! database, and Act! Marketing notifications allow Act! to send updates and messages to all Act! users when this particular notification setting is enabled.
- Users can now define their default history type in preferences to save time when creating new histories.
- Microsoft Sequel Server® V 2014 support: Act! v17.1 now supports SQL 2014. User has the option to install SQL 2014 on server and workstations.

Act! v16

- Act! Premium Mobile now supports Groups & Companies in Contact view, & users can now send emails from their mobile. Tablet scrolling through list views with filtering options makes viewing contacts easier.
- Act! Premium Web improvements include field & layout design capabilities, and improved Google Chrome™ browser usability.
- Automatic calculated fields.
- Enhancements to Company records - when new Contact is created, a new Company record is automatically created. Act! also now automatically links existing and new contacts to a Company record, creating a single consolidated view of all interactions.
- New History List view allows for comprehensive view of all completed activities and other contact record changes from a single tab within the Contact record. This information can also be exported.
- Act! Scheduler Notification available, designed to notify users of the success or failure of system events like backups and sync (based on user-defined rules).
- Reschedule multiple activities at once.
- Universal search now includes ability to create a lookup of contacts resulting from the search,
- Act! Connect replaced by third-party add-on Handheld Contact™.

Act! v16 cont.

- Integrated Act! emarketing (additional fee) & in-product Marketplace.
- Add-on manager for easy maintenance of Act! add-ons (through Tools menu).
- Contact Timeline give a comprehensive view of all interaction details for a Contact on an interactive, dynamic timeline. Includes filters for time frame and main types of items to show.
- Web forms can now be created to capture leads from web pages and more. Once captured, leads are automatically sent to an Act! Group for easy organization.
- Act! Connect service officially discontinued.
- Resolutions to reported issues, including: sync to Google™ accounts, Act! Premium Mobile time zone issue, Act! emarketing service fixes, memory & timeout issues, and Act! Premium for Web issues.
- Act!-Google sync now operational (KB #38005)

Sage ACT! 2013

- Act! Premium Mobile now supports opportunities in Contact view.

- Improvements to installing Act! make it simpler and easier to get started.

- Mobile support for Android™ browser (v4) & iPad® and iPhone® Safari® browser (v iOS4 & iOS).

- Smart Tasks can now run automatically, without user login, and now have data/field triggers that run (without user intervention).

- Social networkin updates now viewable in Act! through the Web Info tab. User can view contacts last 25 posts for LinkedIn® and Facebook®.

Sage ACT! 2012

- Social networking integration now included within emarketing.

- Act! hosting now provided (fee based)

- Improvements to Act! Premium for Web, including administrator tasks like managing users, setting passwords, managing teams and locking/unlocking databases.

- New Act! Scratchpad allows for desktop-based virtual notepad with Task import into Act!.

- Version compatible with Internet Explorer® 9 and Firefox® 4 (MAC or PC).

- Google™ integration added, allowing Gmail™ Integration as email client and Gmail Contacts and Calendar synchronization with customizable sync options.

- Universal Search added. Now search entire database for keyword or phrase and filter options to narrow global search parameters.

- Import wizard improved, providing details of successful and failed imports and option to quickly cancel import if needed.

- Improved installation wizard which shows exact install times and components installed during installation process.

- Sage ACT! Premium Mobile available at no charge (installation of feature required).

- ACT! Connect (fee based) provides access to contacts and calendars from anywhere.

- New notification when Outlook integration fails due to installed 64-bit Office.

Sage ACT! 2012 cont.

- Improved prompts when opening and sharing databases, wizard shows all databases attached to local SQL instance and most recently used databases, allows database sharing to be enabled, option to open database not installed on local hard drive.

- Act! now provides Secure Sockets Layer (SSL) when using Sage ACT! Premium for Web and Google Sync feature.

Sage ACT! 2011

- Usability improvements including a redesigned Welcome Page, toolbar enhancements like Back and Forward Buttons, and faster database creation.

- Business Info tab created, giving access to web-based information on Contacts and Companies provided by Hoovers (D&B Company), ability to purchase marketing lists based on specific demographics (fee based) and import list directly into Act! after purchase.

- Smart Tasks (automated task workflow) added.

- Compatible with Microsoft Windows® 7 & Microsoft Office 2010.

- History improved by adding ability to filter by history type.

- Location column option added to Task List view.

- Data import improvements including import from Excel®, ability to create new fields instantly, and synonym mapping of field names.

- New keyword search option to include all record types.

- True Outlook® Integration of contacts, mail, calendaring and scheduling, plus full contact and calendar sync in Premium Workgroups and Web versions, and improved security in email attach feature.

- Improved security during backup and attachment saves.

Sage ACT! 2010

- New Act! Premium for Web improvements for Word allow users to use mail merge and create Word-based quotes for Opportunities.

- Act! Welcome page added, with links to pertinent resources.

- Navigation simplified, including new big buttons and consolidated menus.

- Ability to specify currency during database creation.

- More robust customization allows for unlimited custom Opportunity fields and dropdowns to be created, plus the ability to set color scheme preference.

- Updated Dashboards, 13 new report templates, and streamlined reports view with Favorites option now available.

- New OLEDB provider allows enhanced reporting from outside of Act! including data from groups/company membership and activities.

- Calendar updates now allow users to send calendar invites via iCalendar® and enhances calendar options in Outlook and Act! to import invites sent by email to Act! users.

- All-new Act! emarketing feature added, giving users the ability to send marketing campaigns within Act!, automatically record contact history, view statistical results of marketing campaigns sent to user by email, and send email surveys and drip marketing campaigns.

Sage ACT! 2010 cont.

- Opportunities improvements include the ability to attach notes/histories/activities/documents, create Opportunities without having to link to an existing Act! entity, create custom tables for Opportunities (third party design tool required), customize product detail view, and limit access to Opportunity using limited access rules.

- Remote database creation modified to support creation of up to 50 remotes at once.

- Usability improvements include instant search access from any view and now after performing a lookup, the email contact list view appears.

- Create a Vcard from Act! contact data and be able to send Vcard info to others via Outlook.

- Web Info tab created, allowing user to view Contact's website and other social networking integrations, within Act!.