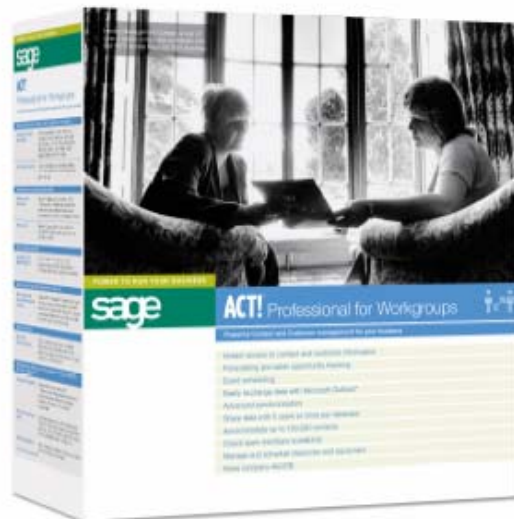


ACT!TM

Professional

ACT! Professional & ACT! Professional for Workgroups



Organize your data

Manage and grow your business relationships

Stay on top of your schedule, 24/7

Forecast and track sales

Centralize customer information

ACT! Professional

The worldwide best-selling ACT! contact management software. Get instant access to every contact detail to manage yourself and your contacts.

ACT! software can help you achieve results faster and enhance your customer intelligence by providing easy access to key contact information. If you already have an existing ACT! database or are considering implementing a proven contact management package [new ACT! Professional software](#) (known as ACT! 2005 software in the US) provides powerful, ease of use functionality at an affordable price with a fast return on investment.

ACT! Software is available in two versions:

ACT! Professional Designed for Individuals, Sales Professionals and teams of up to a maximum 10 users sharing ACT! contact manager. ACT! Professional software is built on the fast, robust Microsoft Data Engine database platform. SEE BELOW	ACT! Professional for Workgroups Supporting teams between 5 and in excess of 100 users with up to 100,000 records. Powerful Microsoft SQL-Server integration delivers enhanced performance with increased scalability and additional functionality. MORE INFORMATION
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Use ACT! Professional software to instantly access customer information

- Store complete contact information including e-mail, notes, history, attachments and more.
- Import data from Microsoft Outlook and other sources.
- Choose from 60 standard contact fields or create your own.
- Customise your database to access and manage information the way you want.
- For maximum customisation add Yes/No Tick Boxes plus picture and memo fields.
- Find anyone or any detail instantly with Look-ups, Advanced Queries or Keyword Searches.



Manage and grow business relationships

- Create Company records to see the entire business relationship - perfect if you need to track multiple contacts who work for the same organisation.
- Arrange data into Groups and up to 15 levels of Subgroups for individual treatment and better organisation.
- Add virtually unlimited date and time-stamped Notes and Histories to easily recall important details.
- Use Rich Text Formatting to change colours, fonts and more.
- Attach documents, presentations, proposals and other files to Activities, Notes and History items.
- Share Notes and Histories between contacts — change a note, and it'll automatically be updated in all places.
- Track completed Activities for each relationship so you know what happened and when.
- Add searchable Secondary Contacts to easily find assistants, family members and more.
- Create, send and track e-mail using the built-in ACT! Professional e-mail client.
- Link correspondence to contacts for a record of what was sent and received.
- Write letters using the built-in word processor or Microsoft Word.
- Send letters, e-mail and more with mail merges.
- Save time with standard letter, e-mail and memo templates.
- Scan for duplicate records to keep contact data clean



Stay on top of your schedule 24/7 with ACT! database software

- Schedule calls, meetings, to-do or other customised activity types quickly and easily.
- View daily, weekly, monthly, work week and even mini-month calendars.
- Set alarms so you never miss important meetings or events.
- Create custom History Types and Priority Levels to help you manage your time.
- Get immediate notification of any scheduling conflicts.
- Schedule recurring activities in one easy step.
- Schedule multiple activities around a single event and automatically add those activities to users' calendars.
- Set Global Events like holidays or company events which appear in everyone's calendars.
- Share calendars between users to see where everyone is at any given time.
- Rollover uncompleted activities to the next day so nothing falls through the cracks.
- Update your calendar with Microsoft Outlook.



Use ACT! database software to improve your bottom line

- Forecast sales with confidence using built-in sales and forecasting tools.
- View and filter all opportunities in one place with Opportunity List.
- Choose from the built-in sales process—or create your own.
- Create or import your product list with item number, cost and price so everyone has the same data.
- Generate instant quotes without re-entering data.
- Use the built-in sales reports or create your own using the improved Report Designer.
- Track opportunities through your sales cycle with interactive pipeline graphs.
- Export your opportunity list to Microsoft Excel for easy data analysis and reporting.



Be more efficient with secure, shared contact management data

- Synchronise in the background so all users have the most up-to-date data.
- Assign up to five security levels to allow different access to information.
- Quick Print any view in ACT!.
- Make records private to protect confidential information.
- Integrates with Microsoft Outlook 2003, 2002 and 2000



Share and secure information with workgroups and teams using [ACT! Professional for Workgroups](#)

- Share data with up to 50 users
- Includes a Microsoft SQL Server 2000 Standard Edition license for each user
- Check team members' availability for meetings, tasks and calls
- Send meeting notices to the entire group
- Manage and schedule resources like conference rooms and equipment
- Synchronize to a central database from within or outside the company firewall
- Organize users into teams to grant access to specific contacts

New Features Tour

What's New in ACT! Professional?

ACT! Professional represents the most expansive new features set introduced in the history of the ACT! database software. As well as delivering numerous, powerful enhancements built on .NET architecture, ACT! Professional provides a new clear, modern user interface that remains as easy and intuitive to use as ever.



New Company Records Link contacts with new Company and Division records for a complete picture of your entire relationship with any company including Notes, Histories, Opportunities and much more. Any changes to core company information will be pushed through to each associated contact for automated updating. An excellent solution for organisations who need company-centric tracking to manage relationships with multiple contacts who work for the same company or department. New Company records can easily be created by converting existing ACT! Groups and Contacts.



Track more Opportunity Information View all your opportunities in one place using the convenient new customisable list view. Access, update and filter opportunities by User, Estimated Close Date, Status, Sale Stage, Amount or Probability of Close. From this new list view you can instantly jump to a contact record by clicking on a relevant opportunity, perform contact Look-ups and even export the Opportunity List into Microsoft Excel 2003, 2002 or 2000 in just a single click.



Updated Calendar Views New Calendar Views provide a more modern look and feel and features a new, customisable Work Week view enabling you to define and display only the days you work - useful if you want to remove weekend displays and perfect for part-time staff. Mini-Calendar views can be expanded on Calendar views to show multiple months and with the new Quick Print facility you can instantly print the Calendar displayed. Other new calendar features include a 1-Click 'Today' view, activity type filter, capability to view activities for up to 10 users plus Global Events which appear in everyone's calendar.



Enhanced database synchronisation ACT! Professional delivers improved synchronisation processes and reliability including a synchronisation scheduler that ensures everyone has the latest data. To ensure consistency, security is enforced through a main to remote database relationship and with secure background synchronisation running all users will be able to stay up to date. ACT! Professional sync settings are now query based for improved allocation of contacts to authorised users. In addition to notes, history and activities, ACT! templates and attachments can now also be synchronised with other users.



Separate Notes and History Tabs Record unlimited date and time-stamped Notes and Histories for each contact to keep track of all your contact relationship information including details of meetings, important conversations, private notes and attachments. With separate tabs for Notes and History entries you'll also be able to benefit from improved organisation of key relationship information.



Powerful, easier to use Look-ups Providing instant access to contact information is one of the key features that has made ACT! the long-running market leader. In addition to basic look-ups and By Example searches, ACT! Professional includes new Keyword searches and Sticky Look-ups remembering your last 5 Look-up terms for any field. Plus, for quicker searching you can now right click on most ACT! fields to instantly perform Look-up searches. For more complex searches using multiple criteria you can define your own advanced queries which can include ranges for greater than or less than and creation / edit dates. As part of the new, more user friendly Advanced Query tool format you can even preview your result before running the query!



Improved E-mail Performance - Create, send and track emails to and from your contacts with the new ACT! e-mail client. Attach e-mail messages to the contact record and create a history item record the email date and its contents. In addition, advanced e-mail search functionality now enables easy retrieval of messages in your ACT! e-mail.



Tighter Integration with Microsoft Outlook 2003, 2002 or 2000 - Keep your entire office up to date by linking your ACT! Software Calendar with your organisation's Outlook Calendar. Schedule and edit an activity in ACT! or Outlook and both calendars will be automatically updated.



Improved Activity Scheduling New Activity Scheduling includes: up to 5 levels of customised Priorities according to your preferences, start / finish dates and times, full day event scheduling, automated activity roll-over, custom alarm sounds and activity banners highlighting key events.



New Activity Series Define a series of pre-defined activities before or after an anchor date for yourself and/or other users or customise your ACT! database to automatically trigger an Activity Series upon editing a specific field, e.g. amending ID/Status to 'Target'



Unlimited, More Detailed Secondary Contacts Add virtually unlimited Secondary Contacts to any contact enabling you to quickly location alternative contacts, assistants, family members and other relevant people. Each Secondary Contact has their own fields that Look-ups can be performed on including e-mail address, business address, up to two phone numbers, ID/Status and more. If you need to promote Secondary Contacts to a new contact you can do so in just a couple of clicks!



Enhanced Groups and Subgroups Use ACT! Professional software to organise your contacts into Groups and up to 15 levels of Subgroups with hierarchy drop-downs available keeping each Group level visible. Through Group records you'll be able to view consolidated Notes, Histories, Activities and Opportunities from all Group members for a complete picture of the whole Group. You can now also save any Look-up as a Group rule to instantly populate new Groups or simply specify your own Group Membership criteria.



Rich Text Formatting ACT! Professional software includes new, Rich Text Formatting. Change fonts, colours, sizes and apply other text formatting changes for increased emphasis of Note, History, Activity and Opportunity entries



1-Click Export to Microsoft Excel 2003, 2002 or 2000 Export any Contact, Company, Group or Opportunity List view to Microsoft Excel with just a single click for further analysis and manipulation of data. All ACT! Professional column customisations are maintained after exporting to aid easy viewing. For more advanced analysis pivot tables can automatically be created from exported data.



New ACT! Software Reporting ACT! Professional come with over 40 standard Reports including Phone Lists, Activity Reports, Relationship Histories, Sales Summaries and more. You can customise Reports to meet your requirements and even export most in HTML, PDF and email format for wider distribution and analysis.



Easily find and eliminate Duplicate Records Scan your database for potential duplicate contact records and use the ACT! Professional Copy / Move Wizard to consolidate duplicate records by easily combining contact fields, Notes, Histories, Activities and Opportunities into one record.



New ACT! Field and Layout Options Add new ACT! database fields including searchable Yes / No Tick Boxes and virtually unlimited character Memo Fields for recording large volumes of data - no more 254 character limitations! Also, new image fields enable you to store images of anything you wish to associate with a specific contact, group or company in your database while new layout tools and options simplify the entire ACT! software layout process.



Forward / Backward Navigation Buttons - New, time saving Navigation Buttons enable you to jump between previously viewed ACT! navigations screens including Contact Detail, Task List, Contact List, Calendar Views, Groups, Company Lists, Opportunity Lists and many others.



Customisable Activity Types - Create your own activity types for better tracking of tasks relevant to your business and job role. For example using ACT! Professional you could define 'Sales Presentation' as an activity in preference to the standard 'Meeting', 'To-Do' or 'Call' activity options.



Robust Forecasting Tools - Meet your sales goals with confidence using in-built ACT! Professional Sales / Opportunity tracking and forecasting tools. Histories are generated automatically as each opportunity moves through your pre-defined sales cycle



Generate Customised Quotes - Create instant quotations from any opportunity without re-keying contact or opportunity information and customise the quote template with your logo and contact information - requirements Microsoft Word 2003, 2002, 2000 and Microsoft Excel 2003, 2002 or 2000.

ACT! Professional for Workgroups delivers extended functionality for larger, fast growing teams supporting between 5 and in excess of 100 users sharing the same ACT! database with as many as 100,000 records.

ACT! Professional for Workgroups

Capable of supporting in excess of 100 users sharing the same database with up to 100,000 contact records. Powerful Microsoft SQL-Server integration allows ACT! Professional for Workgroups to deliver enhanced database performance with increased scalability and additional functionality, perfect for larger workgroups whilst still maintaining the intuitive ACT! software interface.



Manage User Teams

ACT! Professional for Workgroups goes beyond the standard public and private categorisations of contacts by enabling ACT! Administrators to pool users into relevant teams e.g. 'Field Sales Team'. Once defined, Administrators can grant Teams access to specific contacts making it far easier than creating access settings for each and every user. A time saving resource and ideal for Administering large numbers of ACT! users where controlling contact access is paramount.



Be more efficient with secure, shared data

Assign five security levels to control access to contact data by specific users or user teams



Enhanced Synchronisation

New synchronisation processes enable background running to keep all users up to date. ACT! Professional for Workshops also provide extended sync services which enable authorised users to sync even if the main database isn't open and whether they are inside or outside your firewall



Enhanced Group Scheduling

Use ACT! Professional for Workgroups to instantly check team members' availability for meetings, tasks and calls and send meeting notices to the entire group



Schedule Resources

Manage key resources like meeting rooms and IT equipment and use ACT! Professional for Workgroups to check resource available and associate them with specific activities

ACT! Comparison Chart

Organise your Data

	ACT! Professional	ACT! Professional for Workgroups	ACT! 6.0
Enhanced Look and Feel	✓	✓	-
60 Pre-Defined Contact Fields	✓	✓	✓
15 levels of Subgroups	✓	✓	-
Run Look-ups to find any detail	Improved	Improved	✓
Record detailed Secondary Contact information	✓	✓	Basic
Notes and Histories tracking all contact communications	Improved	Improved	✓
Share Notes and Histories between Contacts	✓	✓	-
Rich Text Formatting	✓	✓	-
Company Records	✓	✓	-
Custom History Types	✓	✓	-
1-Click List Export to Microsoft Excel	✓	✓	-
Export Data to a .txt delimited file	✓	✓	✓
Quick Print capability	✓	✓	-
Private Records	✓	✓	✓
Internet Services - attach website snapshot to ACT! contacts	✓	✓	✓
New Image Fields, Tick Boxes, Unlimited Character Memo fields	✓	✓	-

Forecast and Track Sales Opportunities

	ACT! Professional	ACT! Professional for Workgroups	ACT! 6.0
Integrated Sales Opportunity Environment	✓	✓	Basic
Report Designer	Improved	Improved	✓
Forecasting Tools	✓	✓	✓
Opportunity List View	✓	✓	-
Create Multiple Sales Processes	✓	✓	-
Product Lists	✓	✓	-
Instant Quotes	✓	✓	-
Sales Reports and Report Designer	Improved	Improved	✓
Interactive Pipeline Report	✓	✓	Basic

Manage Your Schedule

	ACT! Professional	ACT! Professional for Workgroups	ACT! 6.0
Activity Tracking	✓	✓	✓
Task List View	✓	✓	✓
In-built Calendar	Improved	Improved	✓
Five Calendar Views	✓	✓	-
Calendar Pop-Ups	✓	✓	✓
Set Activity Alarms	✓	✓	✓
Automatically Rollover Activities	✓	✓	✓
Manager and Schedule Key Resources	-	✓	-
Set Recurring Activities	✓	✓	✓
Create Global Events like holidays in everyone's calendar	✓	✓	-

Manage Your Schedule

	ACT! Professional	ACT! Professional for Workgroups	ACT! 6.0
Custom Activity Types	✓	✓	-
Custom Activity Priority Levels	✓	✓	-
Multi-User Activity Series	Improved	Improved	✓
Grant Calendar Access	✓	✓	-
Instantly View User Availability	-	✓	-
Send Meeting Invitations	-	✓	-

Contact Communications

	ACT! Professional	ACT! Professional for Workgroups	ACT! 6.0
ACT! E-Mail Client	Improved	Improved	✓
Writing Letter Templates through Microsoft Word	✓	✓	✓
Mail Merging	✓	✓	✓
Outlook Calendar Synchronisation	Improved	Improved	✓

Database Administration

Import Data from Microsoft Outlook and .TXT / .CSV	✓	✓	✓
Layout Designer	Improved	Improved	✓
Eliminate Duplicate Records	✓	✓	-
Background Synchronisation and Sync Scheduler	✓	✓	-
Advanced Synchronisation Services	-	✓	-
5 Levels of User Security settings	✓	✓	-
Increased Scalability to as many as 100 users	-	✓	-
Microsoft SQL Server 2000 integration	-	✓	-
Team based user management	-	✓	-
Manage user / team access to specific contacts	-	✓	-

ACT! Professional Software - Frequently Asked Questions

How do ACT! Professional and ACT! Professional for Workgroups differ?

[ACT! Professional](#) is designed for individuals, sales professionals and sales teams of up to 10 users sharing data.

[ACT! Professional for Workgroups](#) is for sales teams, small business and corporate workgroups of up to 100 users sharing data as well as organisations who require increased database security and advanced workgroup management.

What's new in ACT! Professional?

ACT! Professional includes a huge range of new features along with hundreds of enhancements designed to improve your efficiency and increase your productivity. Among the most important are:

- New company records
- Enhance Sales Opportunity Management
- Updated calendar views and usability
- Improved database synchronization

See our [New Features Guide](#) for further details plus relevant screenshot

With ACT! Professional, can I have more than 10 users who share the same database?

No, ACT! Professional is subject to a maximum of 10 users sharing data. If you require more than 10 users who will share the same data, you must use ACT! Professional for Workgroups.

I've seen information relating to ACT! 2005, is this the same as ACT! Professional?

ACT! 2005 is the name of new North American release of ACT! This provides the same features set as ACT! Professional albeit with US zip code and phone formatting. No support is available for ACT! 2005 in the UK.

Have the System Requirements changed from ACT! 6.0?

Yes, there are several important changes. In particular ACT! Professional no longer supports Microsoft Windows 98/NT/ME and will not work with Microsoft Office / Outlook 98 or older. Please refer to our [Systems Requirements](#) page for more detailed information.

Can I have ACT! Professional and ACT! Professional for Workgroups running on the same machine?

No, you can only run one version of ACT! Professional on a PC at any given time.

If several users are sharing the same PC do I have to buy each user a license of ACT! Professional?

Yes, each named user in a database must have a unique ACT! license number.

How does Product Activation work?

ACT! Product Activation is a technology designed to protect ACT! customers from purchasing pirated software. Product Activation helps assure a safe and easy-to-use software experience. ACT! Product Activation is a quick and easy process to complete and is designed as part of the general process of product registration. You will be prompted to register when you first launch the product. Follow the brief wizard to submit your registration information and serial number. If you do not register and activate, the product will run in trial mode for up to 30 days. After that time, the product will not run unless you register and activate. Once activated will be able to access your data as normal.

System Requirements

Based on changes in the technology landscape the System Requirements for ACT! Professional and ACT! Professional for Workgroups have been updated from earlier ACT! software releases and we would urge readers to review the following carefully:

- In a shared environment, ACT! Professional will work with up to a maximum of 10 users. If you intend to share the database with more than 10 users you must purchase ACT! Professional for Workgroups.
- You must purchase 1 licence per user.
- Client registration and licence activation are required in order to use this software.
- Due to the changes in the ACT! database architecture some ACT! add-on product may not be compatible with ACT! Professional and we recommend checking with your add-on provider.
- ACT! Professional no longer works with: Microsoft® Windows® 98/NT/ME, Lotus Notes® e-mail, Microsoft Office 98 or older, Microsoft Outlook 98 or older.

ACT! Professional

- **RAM** - Minimum 256 MB RAM (512 MB RAM or higher recommended)
- **Hard Disk Space** - Minimum 300 MB of available hard disk space
- **Processor** - Minimum 266 MHz processor (Pentium III or higher recommended)
- **Operating Systems** - Microsoft® Windows® XP Home, Windows XP Professional, Windows 2000 Professional, Windows 2000 Server, Windows 2000 Professional, Windows Server 2003 Enterprise Edition, Windows Server 2003 Web Edition, Windows Server 2003 (Assumption is current recommendable Service Pack only for any OS)
- CD-ROM drive
- SVGA (800x600) or higher resolution monitor

ACT! Professional for Workgroups

Client installation using Microsoft SQL Server 2000 Desktop Edition (MSDE)

- **RAM** - Minimum 256 MB RAM (512 MB RAM or higher recommended)
- **Hard Disk Space** - Minimum 300 MB of available hard disk space
- **Processor** - Minimum 266 MHz processor (Pentium III or higher recommended)
- **Operating Systems** - Windows XP Home, Windows XP Professional, Windows 2000 Professional, Windows Server 2003 Web Edition
- CD-ROM drive
- SVGA (800x600) or higher resolution monitor

Database Server installation using Microsoft SQL Server 2000 Standard Edition

- **RAM** - Minimum 512 MB RAM
- **Hard Disk Space** - Minimum 350 MB of available hard disk space
- **Processor** - Minimum 266 MHz processor (Pentium III or higher recommended)
- **Operating Systems** - Microsoft Windows 2000 Server, Microsoft Windows 2000 Advanced Server, Microsoft Windows Server 2003 Standard Edition, Microsoft Windows Server 2003 Enterprise Edition
- CD-ROM drive
- SVGA (800x600) or higher resolution monitor

ACT! Professional and ACT! Professional for Workgroups software works with:

- Microsoft Outlook 2003, 2002 and 2000; Outlook Express 6.0 and 5.5; Eudora 6.0 and 5.2; Internet Mail SMTP/POP3
- Microsoft Office 2003, 2002 and 2000
- Microsoft Internet Explorer 5.5 or higher
- Adobe Acrobat 6.0 and 5.0
- Microsoft and Novell Networks supported through Microsoft Novell Adapters