



ACT! 2008 Solutions
Feature Comparison Chart

	Sage 50 ACT!	Sage 50 ACT! Premium	Sage 50 ACT! Premium for Web
Organize contacts and leads			
Contact details, notes and history, appointments and to-do items, documents, and opportunities	✓	✓	✓
Documents and document shortcuts	✓	✓	✓
60+ pre-defined fields	✓	✓	✓
Prevent and eliminate duplicate Records	✓	✓	✓*
Virtually unlimited date-and time-stamped Notes and History	✓	✓	✓
Notes and History shared between Contacts	✓	✓	✓
Company Records with Contacts linked to Companies	✓	✓	✓
Groups with 15 levels of hierarchy (14 Subgroups)	✓	✓	✓
Consistent Labels within Groups and Companies	✓	✓	✓
Duplicate Checking for Groups and Companies	✓	✓	✓
Group and Company Hierarchy	✓	✓	
Advanced Queries for Groups and Companies	✓	✓	✓
List Edit Mode	✓	✓	
Manage daily responsibilities			
Calls, meetings, and to-dos	✓	✓	✓
Multiple calendar views including Daily, Weekly, and Monthly	✓	✓	✓
Calendar pop-ups	✓	✓	✓
Activity alarms and automatic rollover of activities	✓	✓	✓
Activity conflict notification	✓	✓	✓
Recurring activities	✓	✓	✓
Activity Series	✓	✓	✓*
Group scheduling		✓	✓
Outlook calendar sync	✓	✓	
View global events	✓	✓	✓
Track sales opportunities			
Built-in ACT! sales process or customize to suit your specific needs	✓	✓	✓*
Opportunity list view, with filter for Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.	✓	✓	✓
Customizable opportunity field names and types with drop-down lists		✓	✓*
Generate and import Product List	✓	✓	✓*
Instant quotes	✓	✓	
Graphical sales pipeline with drill down to see opportunity details	✓	✓	✓
Pre-formatted Sales reports	✓	✓	✓
Export to Excel®	✓	✓	✓
Multiple Contacts per Opportunity	✓	✓	✓
Opportunity List Details	✓	✓	✓
Opportunity Date Fields		✓	✓
Communicate more effectively			
ACT! E-mail Client integrated with Outlook®, Outlook Express®, or Lotus Notes®	✓	✓	
Direct integration with Outlook	✓	✓	✓
Use ACT! as Outlook Address Book	✓	✓	✓
Create ACT! Contact from Outlook e-mail	✓	✓	
Attach Outlook e-mail to ACT! Contacts	✓	✓	✓

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Communicate more effectively (continued)			
History of all customer correspondence	✓	✓	✓
Last Communication fields	✓	✓	✓
Built-in word processor – tables, HTML images, spell checking, and more, or use Word	✓	✓	✓
Pre-formatted templates – e-mails, letters, and memos	✓	✓	✓
Mail Merge with letter or e-mail to a contact or a group of contacts	✓	✓	✓
Validate and correct addresses during Mail Merge	✓	✓	✓
Gain business insight			
Look-ups and Keyword Search	✓	✓	✓
Look-up Contacts by access		✓	✓*
Numeric look-ups such as greater than or less than queries	✓	✓	✓
40 standard reports including Phone Lists, Activity Reports, Referral Source, Sales Summaries, and more	✓	✓	✓
ACT! Dashboard	✓		
ACT! Premium Dashboard		✓	✓
Report Designer	✓	✓	✓*
Report on activities by user		✓	✓
Customizable Priority, Activity, and History types	✓	✓	✓*
Field types – Picture, Yes/No, Memo, E-mail	✓	✓	✓*
Layout Designer	✓	✓	✓*
Customizable drop-downs; utilize multi-select values	✓	✓	✓
Customizable navigation bar	✓	✓	
Accommodate large teams			
Scalability to accommodate large teams of users		✓	✓
Five security levels	✓	✓	✓
Custom user permissions		✓	✓
View team memberships		✓	✓*
Automatic database sync, backup, and maintenance		✓	✓*
Password rules	✓	✓	✓*
Silent Install		✓	
Company Security	✓	✓	✓
Group and Company Security		✓	✓
Access while mobile or remote			
Anytime, anywhere access with ACT! Premium for Web			✓
20 templates designed for popular paper organizers for printed schedules	✓	✓	✓
Print any ACT! calendar template with the contact phone number	✓	✓	✓
Citrix® or Terminal Services support	✓	✓	✓
Synchronize Palm OS®	✓	✓	
Windows® Mobile 5.0	✓	✓	
BlackBerry®	✓	✓	
Integrate with accounting solutions			
Sage Instant Accounts	✓	✓	
Sage 50 Accounts	✓	✓	

Please note: Bold items included in this chart denote new and improved features in ACT! 2008.
*Asterisks denote this operation must be performed on the web server.



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