



# What's new in Act! v16

Thanks for your input. We happily took it to heart!

## Maintaining a competitive edge requires you to work smarter to accomplish more

Designed with extensive user input, Act! v16 delivers new functionality and enhancements that help you maximize your time, prioritize intelligently, and be informed and prepared to market and sell.

Create a holistic view of all relationship interactions at a company automatically, and benefit from an insightful look back at a consolidated history for your system and everyone you do business with. Take the guesswork out of knowing where to prioritize your time based on data-driven customer intelligence, and quickly perform actions en masse to free up your time. Drive productivity in the field with new mobile enhancements<sup>1</sup> and gain peace of mind knowing your system and data are healthy via proactive system notifications.

## Streamlined company management and global actions increase sales effectiveness

|             |  |           |               |
|-------------|--|-----------|---------------|
| Company     | Ace Pet Store Franchises   | Address   | 925 Cabby St. |
| Phone       | (423) 555-1221   |           | P.O. Box 123  |
| Fax         | (423) 555-7412   |           |               |
| Toll-Free   | (800) 555-2453   | City      | Eugene        |
| Web Site    | <a href="http://www.acepetfranchises.com">www.acepetfranchises.com</a> | State/ZIP | OR 97401      |
| ID/Status   | Customer   | Country   | United States |
| Referred By | E-mail Campaign  |           |               |

| Contact           | Company                  | Phone          | Extension | E-mail                    | Ti |
|-------------------|--------------------------|----------------|-----------|---------------------------|----|
| Jim Curtis        | Ace Pet Store Franchises | (423) 555-1221 |           |                           | M  |
| Gavin Dillerstone | Ace Pet Store Franchises | (423) 555-1221 |           |                           | M  |
| Jackie Jorgensen  | Ace Pet Store Franchises | (423) 555-1221 |           | JJ@acepetfranchises email | Ph |
| Colleen McCarthy  | Ace Pet Store Franchises | (423) 555-1221 |           |                           | O  |
| Sandy Ryan        | Ace Pet Store Franchises | (423) 555-1221 |           |                           | Bu |

A consolidated view of contact details for everyone you do business with at a company – automatically.

Effortlessly link all contacts at a company to benefit from a consolidated view of notes, history, and activities

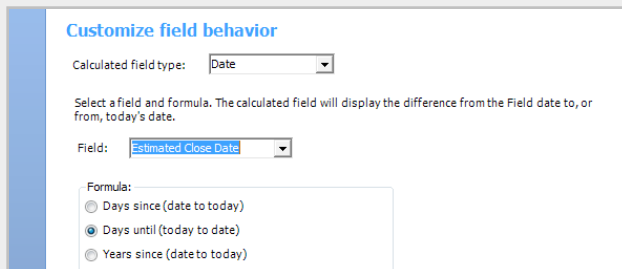
for everyone you do business with. Act! v16 can automatically link existing and new contacts to company records so you don't have to. Market and sell intelligently, because you're informed and prepared based on a complete view of all contact interactions at a company, and save time by performing global actions like emailing and scheduling. Company records are automatically created when the first contact is created – both in the office and using Act! Premium Mobile<sup>2</sup>.



- Streamlined company management & global actions increase sales effectiveness
- New calculated fields drive prioritization and maximize customer IQ
- New History view provides an insightful look back
- Act! Premium Mobile<sup>2</sup> enhancements drive productivity in the field
- Usability and system improvements for speed and peace of mind

## New calculated fields drive prioritization and maximize customer IQ

Act! v16 puts your data to work for you by performing calculations automatically in a field using data from other standard or custom fields. Use calculations based on age, date, percentage, dollar value, currency, and other data to help you prioritize and make data-driven decisions. Automate specific actions based on calculated data, including contract renewals, birthday and thank you notes, follow-up surveys, restock reminders – and more.



Drive productivity through customer insight and intelligent prioritization, and automate tasks to drive sales and enhance relationships.

## New History view provides an insightful look back

Assess productivity, see a customer activity timeline, export data, and schedule global follow-up actions via a dynamic new view that aggregates user and system history.

With Act! v16, you'll gain business insight from a convenient view of all completed user activities and system actions such as to-dos, calls, e-mails, meetings, and deleted contacts. Save time by filtering past activities and scheduling individual or global actions from a single history view instead of within individual contact records.

The screenshot shows the "History List" view in Act! v16. It features a toolbar with icons for Back, Forward, New, Call, Meeting, To-Do, Note, History, E-mail, and Help Topics. Below the toolbar is a search bar and filters for "Dates: All Dates", "Types: All", and "Keyword:". The main area is a table with columns: Date, Time, Type, Contact, Company, Result, Regarding, Phone, and Email. The table lists various activities such as "Opportunity Won", "New Opportunity", and "Call Completed" for different contacts and companies.

| Date       | Time     | Type            | Contact          | Company              | Result          | Regarding                                     | Phone          | Email |
|------------|----------|-----------------|------------------|----------------------|-----------------|---|----------------|-------|
| 11/18/2014 | 10:00 AM | Opportunity...  | UR Powerful      | Captains of Industry | Opportunity...  | Upgrade for Houston - ACT! Sales Cycle...     | (713) 661-5095 | ur@c  |
| 8/22/2014  | 1:30 PM  | Opportunity...  | UR Powerful      | Captains of Industry | Opportunity...  | New Opportunity - ACT! Sales Cycle...         | (713) 661-5095 | ur@c  |
| 12/15/2014 | 1:14 PM  | Opportunity Won | UR Powerful      | Captains of Industry | Opportunity Won | Houston Training Facility \$12,000.00...      | (713) 661-5095 | ur@c  |
| 11/13/2014 | 12:37 PM | Opportunity Won | UR Powerful      | Captains of Industry | Opportunity Won | SC for Bellaire Offices \$2,000.00 Closed...  | (713) 661-5095 | ur@c  |
| 4/18/2014  | 12:13 PM | New Opportunity | UR Powerful      | Captains of Industry | New Opportunity | New Opportunity - ACT! Sales Cycle Initial... | (713) 661-5095 | ur@c  |
| 3/17/2014  | 12:17 PM | New Opportunity | UR Powerful      | Captains of Industry | New Opportunity | New Opportunity - ACT! Sales Cycle...         | (713) 661-5095 | ur@c  |
| 5/23/2014  | 6:30 AM  | Call            | +Fred Fenderline | CH Gourmet Coffee    | Call Completed  | European Sales Meeting Conference Call        | 0208 746534    | fendc |
| 10/26/2014 | 6:30 AM  | Call            | +Fred Fenderline | CH Gourmet Coffee    | Call Completed  | European Sales Meeting Conference Call        | 0208 746534    | fendc |
| 4/9/2014   | 6:26 PM  | Call            | +Fred Fenderline | CH Gourmet Coffee    | Call Completed  | European Sales Meeting Conference Call        | 0208 746534    | fendc |
| 3/28/2014  | 7:30 AM  | Call            | +Fred Fenderline | CH Gourmet Coffee    | Call Completed  | European Sales Meeting Conference Call        | 0208 746534    | fendc |

“Act! v16 continues to add timely new features to the most user-friendly customer management software in the industry.”<sup>3</sup> –Act! v16 Beta participant



## Act! Premium Mobile enhancements<sup>2</sup> drive productivity in the field

Be more productive while away from the office using new mobile features and enhancements that save time and make you smarter.

Act! Premium Mobile<sup>2</sup> in v16 puts the same group and company functionality you rely on in the office at your fingertips. View customer groups – like hot leads in the city I'm traveling to – then send an email to all contacts at a specific company. A new split-screen tablet view lets you scroll through, select and view records more conveniently.

“Solid improvements. Giving users new features and enhancements to existing features shows that Act! is listening. Keep it up!”<sup>13</sup> —Act! v16 Beta participant

## Usability and system improvements for speed and peace of mind

Act! v16 introduces Scheduler Notifications, designed to proactively notify you of the success or failure of system events like backups and sync, based on rules you define. Now you can also reschedule activities en masse and take advantage of streamlined Act! Web Client<sup>4</sup> configuration capabilities.

### Send Notifications

Select who should receive an e-mail notification of the success or failure of a scheduled task.

Send e-mail notifications

E-mail address:  
Chris.Huffman@CHTechOne.email

Save time and rest assured that your system and data are healthy and secure with global activity rescheduling, proactive system alerts, and streamlined field and layout configuration<sup>4</sup>.

“Act v16 follows in the path of previous releases as a stable product with new features taking advantage of the latest technologies.”<sup>13</sup> —Act! v16 Beta participant

## The new Act!

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 Act! v16 to propel your sales and marketing success.

**ACT! by Sage 2009**

- Related contacts
- Seamless interaction with Microsoft® Outlook® email

**ACT! by Sage 2010**

- Web info tab
- Email marketing with Sage E-marketing for ACT!®
- Reports view
- Simplified navigation
- Welcome page
- Customizable opportunities

**Sage ACT! 2011**

- Smart Tasks
- Outlook® contact and calendar sync
- Direct import from Excel®, no .csv required
- Works with Office 2010 and Windows® 7

**Sage ACT! 2012**

- Sage ACT! Premium Mobile<sup>2</sup>
- Mobile access with Sage ACT! Connect<sup>3</sup>
- Sage ACT! Scratchpad
- Universal search
- Gmail integration
- Google Contacts™ and Google Calendar™ sync
- Works with Internet Explorer® 9 and Firefox®4

**Sage ACT! 2013**

- Sage ACT! Premium Mobile<sup>2</sup> with Opportunities
- Social Updates<sup>4</sup>
- Offline Smart Tasks<sup>5</sup>
- Smart Tasks<sup>6</sup> with data/field triggers<sup>6</sup>
- Optimized download and install experience
- Usability improvements based on customer feedback
- New wizards for remote database creation, plus database moving and sharing

**Act! v16**

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● Unsupported version. Not available for upgrade pricing.

Call us at 866-873-2006, contact your Act! Certified Consultant\*, or visit [act.com/upgrade](http://act.com/upgrade) for more information.

1 Act! v16 mobile enhancements apply to Act! Premium Mobile only. 2 Act! Premium Mobile requires setup and configuration of Act! Premium (access via Web). Data access available via active Internet connection from supported device browsers. Review Act! system requirements at [act.com/systreq](http://act.com/systreq). You are responsible for all data-related charges. 3 Reviewer is a participant in the Beta Program and may be eligible for participation-based incentives. 4 Act! Premium (access via web) users only. 5 Requires additional subscription. 6 Mobile requires additional subscription to Act! Connect for Act! Pro users. 7 This feature is not available in Act! Premium (access via web). 8 Sage E-marketing for ACT! steps will not run offline. 9 Data/field triggers are only available in Contact and Opportunity entities.

**Important Note:** Review Act! system requirements at [act.com/systreq](http://act.com/systreq). You must purchase one license of Act! per user. Scalability varies based on hardware, size, and usage of your database. Visit [act.com/](http://act.com/) marketplace or contact your add-on product provider to determine compatibility for your add-on products. Act! Pro customers should review Act! Connect system requirements at [act.com/connectsystreq](http://act.com/connectsystreq) to confirm supported mobile devices, tablets, and web browsers before subscribing to this service. You are responsible for all data-related charges. Based on your wireless plan, you may receive an extra charge from your carrier for the initial setup text message.

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