Sage ACT! | 2012

Accomplish More Every Day with Sage ACT! 2012

Like many small businesses and sales teams, it's likely you're on the relentless pursuit to find more time in your day or at least to maximise the time you have. Not only that, but the lines between your business and personal lives are becoming increasingly blurred. Don't think it's possible to keep it all together? It is when you use the new productivity and efficiency features in Sage ACT! 2012.

Revolutionise the way you manage your day with a convenient, virtual notepad[1] that enables you to quickly capture impromptu notes, phone numbers, and personal reminders. Prioritise and check off items once completed, print the list to take it with you, and push tasks that require further follow-up into Sage ACT!.

Work seamlessly with the web-based productivity tools you already rely on, including Gmail,® Google® Contacts, and Google Calendar™. No need to check two different places for a complete view of your emails, contact details, and personal activities. All or just a subset of these details can be kept updated in Sage ACT!.

Find what you need in an instant with a faster, more expansive search option that gets you to that key document or piece of info you need in your notes, history and even attachments.

Have convenient access to your contacts and calendar from virtually anywhere when you subscribe to Sage ACT! Connect[3]. Whether you're traveling, working from home, or are simply away from the office, you can get to these details from popular smartphones, tablets, like the iPad®, and your laptop via supported web browsers[2].

And when you upgrade, you'll benefit from numerous usability improvements based on extensive research and testing, like the new Connections page. Many of the improvements in Sage ACT! 2012 were implemented based on direct feedback from many customers across Australia and New Zealand.

"I absolutely love universal search. I can't tell you how many times I've scrolled through my whole contact list looking for something. I was able to do it by typing one word and with two mouse clicks. Thank you Sage!"[7]

– Sage ACT! 2012
Beta Participant

Revolutionise the Way You Manage Your Day

Forget about conventional paper-and-pen lists that fail to keep you on task. Revolutionise the way you manage your day with Sage ACT! Scratchpad[1], a convenient, virtual notepad where you can quickly capture impromptu notes, phone numbers, and personal reminders, with or without opening Sage ACT!. But that's not the best part. Prioritise and check off items once completed, print the list to take it with you, and push tasks that require further follow-up into Sage ACT! with just a few clicks. Send them to Sage ACT! as activities, notes, and history and even assign them to contacts. Let's say you're working on a proposal for Chris Huffman, but the phone rings, so you get distracted. You quickly jot down a reminder in Sage ACT! Scratchpad. When you have time at the end of your day, you push that activity into Sage ACT! on Chris Huffman's contact and set an alarm to go off first thing the next morning. Finally you can rid yourself of the sticky notes and legal pads that have been cluttering your desk for years and actually get through your to-dos!
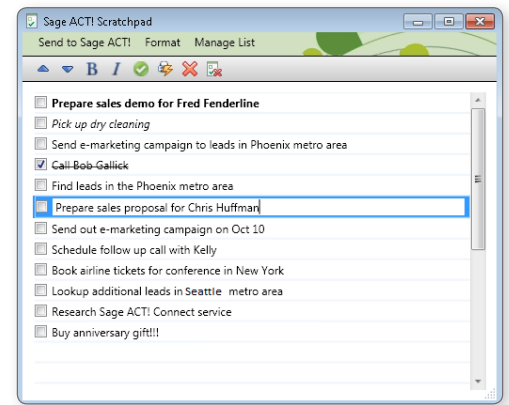

● Sage ACT! Scratchpad[1]: Capture impromptu notes, phone numbers, and personal reminders, with or without opening Sage ACT!.

Work Seamlessly with the Web-based Productivity Tools You Already Rely On

Sage ACT! is the one place where you manage all the details of your business relationships, but you may also be using Gmail, Google Contacts, and Google Calendar to manage additional business and personal details. You don't have to check two different places or manage two different calendars for a complete view of your business and personal lives. Keep all or just a subset of your emails, contacts, and activities updated in both places when you sync Sage ACT! with Google. When an email is sent and/or received in Gmail, even if it's an email address with your registered business domain, that history will be recorded in Sage ACT! on the corresponding contact. If you're working in Google, you can see your Sage ACT! contacts or if you're working in Sage ACT!, view your Google contacts. Even clear activities once completed from either application. No need to stop the flow of where or how you work.

Find What You Need in an Instant with a Faster, More Expansive Search Option

You've got all the details of your business relationships organised in Sage ACT!, but you need an easier way to dig into that data. With a new universal search option, you can find that one thing you need in an instant, because search is faster and more expansive than ever. Let's say you're looking for the sales proposal prepared for "Yellow Jersey Bikes". Sage ACT! will search your contacts, groups, companies, opportunities, notes, history and even attachments for that term. Further hone your search when you filter by all dates, last 24 hours, last week, and last month. Once your search results are displayed by relevance, simply double-click on the item of interest and you're taken to that particular field or attachment for more detail. And, if it's not what you're looking for, simply use the back button to view the search results page again.
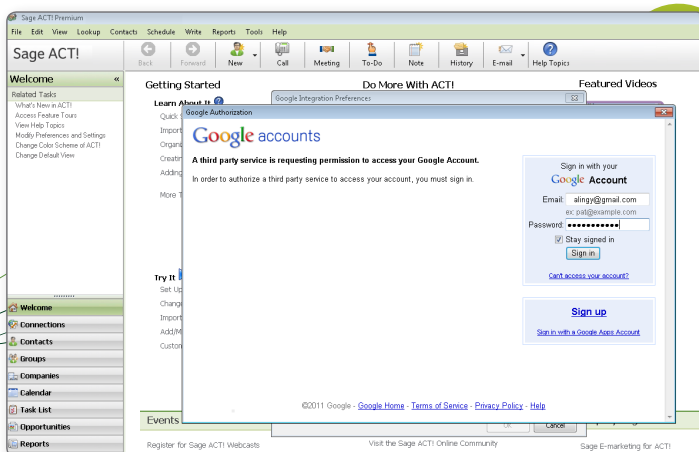

● Gmail, Google Contacts, and Google Calendar: Keep all or just a subset of your emails, contacts, and activities updated in both places when you sync Sage ACT! with Google.
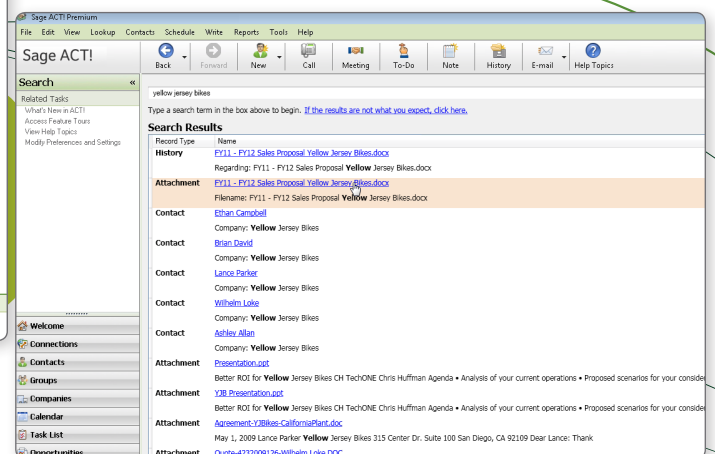
● Universal Search: Your search results are displayed by relevance and you can double-click on the item of interest to be taken to that particular field or attachment.

Access Sage ACT! From Where You Are, From the Method Most Convenient for You

Your business takes you everywhere and you need Sage ACT! to be there with you. Now it can be. When you subscribe to Sage ACT! Connect[3], you have convenient access to the details you need from virtually anywhere. Details like your Sage ACT! contacts and calendar are stored in the Cloud, so you can quickly pull up that customer address you're headed to, make changes to an existing phone number or email address, and check your meeting schedule for the day. Do this from popular smartphones, including BlackBerry®, Windows Mobile®, and Android™ devices; tablets, like the iPad; and your laptop via supported web browsers, including Internet Explorer®, Firefox®, Google Chrome™, and Safari®[2]. And, not only will you have access to Sage ACT! details, you can keep your Google® and Yahoo!® contacts in Sage ACT! Connect too. Even link Facebook® pictures to your contacts, so it's that much easier to put a face to a name.
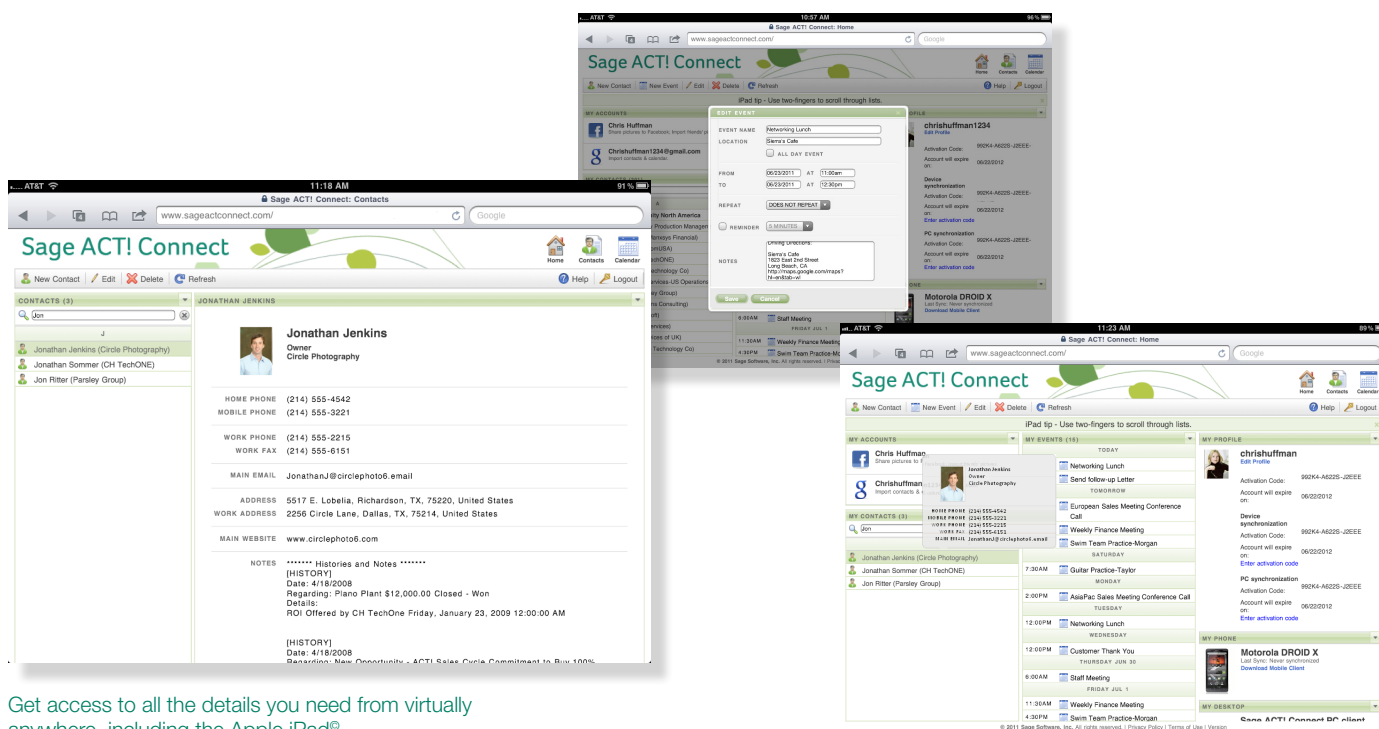
Get access to all the details you need from virtually anywhere, including the Apple iPad.©

Connect to Powerful, Subscription-based Sales, Marketing Services, and More

Rely on Sage ACT! as your business command center, further specialised for your specific business when you connect to powerful, subscription-based sales and marketing services, plus other desktop applications and web-based productivity tools. Subscribe to Sage Business Info Services for ACT![3] via the new Connections page in-product for access to highly-targeted leads from Hoover's™ that you can segment and import directly into Sage ACT!, or Sage E-marketing for ACT![3] to easily create and send impactful email marketing campaigns, and track results within Sage ACT!.

Further, you can connect to Microsoft® Outlook® and Google® from the new Connections page. Setup synchronisation, manage individual preferences, and more.

"Using Sage ACT! and Sage E-marketing for ACT! has expanded our marketing capabilities, improved our efficiency and productivity in sales, and allowed us to reach more people through one software program." [8]

– Stephanie Kelso, Z-Axis

What's New Since Your Version

A number of new features, enhancements to existing functionality, and powerful, subscription-based services have been introduced since your version. Check out what you could be doing with Sage ACT! to drive results for your business when you upgrade to Sage ACT! 2012 and subscribe to sales and marketing services.

ACT! by Sage 2008

Graphical dashboards

Duplicate checking by first and last name

Duplicate checking for groups and companies

Advanced Queries for groups and companies

ACT! by Sage 2009

Related contacts

Seamless interaction with Microsoft® Outlook® email

ACT! by Sage 2010

View LinkedIn®, Facebook®, and more from within Sage ACT!

Email marketing with Sage E-marketing for ACT![3]

Reports view

Simplified navigation

Welcome page with feature tours, help, and news from Sage

Customisable opportunities

Sage ACT! 2011

Smart Tasks, which is like workflow, only easier

Leads[4] with Sage Business Info Services for ACT![3]

Microsoft Outlook contact and calendar sync

Direct import from Excel®, no .csv required

Works with Microsoft Office 2010 and Windows® 7

Sage ACT! 2012

Sage ACT! Scratchpad[1], a convenient, virtual notepad

Universal search

Seamless interaction with Gmail

Google Contacts and Google Calendar sync

Access to Sage ACT! contacts and calendar from virtually anywhere with Sage ACT! Connect[3]

Connections page

Usability improvements based on customer feedback

Confirmation message after importing from Excel and other Sage ACT! databases

Menu that displays exact install times and components required

Works with Internet Explorer 9 and Firefox 4

Unsupported Version

Unsupported Version on 11/30/11

About Sage ACT!

Sage ACT! is the #1 selling contact & customer manager in the world with 2.8 million users, including 56,000 corporate customers. At Sage, we live and breathe business every day. We are passionate about helping our customers achieve their ambitions. Our range of business software and services is continually evolving as we innovate to answer our customers' needs. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,600 people and supports more than 6 million customers worldwide. With Sage ACT!, organise your details, market like a pro, control your sales pipeline, get more done, and stay in sync with your team and your customers – and all this at a price which blows all competition out of the water!

Important Notes:

For Sage ACT!: Review Sage ACT! system requirements at www.act.com/2012systreq. You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Contact your add-on product provider to determine compatibility for your add-on products. **For Sage Connected Services for ACT!:** The mobile component of Sage ACT! Connect requires an active data plan. You are responsible for all data related charges to your mobile phone. To facilitate mobile setup, Sage ACT! Connect sends a text message to your mobile phone. Based on your wireless plan, you may receive an extra charge from your carrier for this text message. Sage E-marketing for ACT! is powered by Swiftpage™. **For ACT! 6.x or Prior Customers:** Customer activation and registration are required to use Sage ACT!. Certain features may have changed or are no longer available, including inbound caller ID functionality, WinFax integration, recording and playback of macros, email/modem–based database synchronisation, and SideACT!.

1 Sage ACT! Scratchpad is not supported in a Citrix® environment.
2 Review Sage ACT! Connect system requirements at www.act.com/connectsystreq to confirm supported mobile phones, tablets, and web browsers.
3 Requires additional subscription.
4 400 leads per month are included in the Reference + Leads service level. Additional leads are sold in blocks of 400.
5 Import functions for Sage Business Info Services for ACT! must be performed on the web server when using Sage ACT! Premium (access via web).
6 Drip Marketing is purchased in addition to the Email Marketing service level. Each additional user is an additional cost.
7 Customer is a participant in the Sage ACT! 2012 Beta Program and may be eligible for participation-based incentives.
8 Customer is a participant in the Sage Customer Reference Program and may be eligible for participation-based incentives.

*Sage ACT! Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.