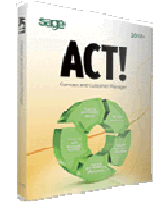


ACT! 2012 Pro & Premium Upgrade Guide from ACT! 2010



Latest ACT! updates at a glance:

	ACT! 2012	ACT! 2010
WORKS WITH:		
Works with Microsoft Office 2010	✓	✗
Supports Windows Small Business Server 2011	✓	✗
Internet Explorer 9 & Firefox 4.0	✓	✗
NEW FEATURES:		
Search on ACT! attachments NEW IN ACT! 2012	✓	✗
ACT! Scratchpad application NEW IN ACT! 2012	✓	✗
Smart Tasks automated activity scheduling	✓	✗
Open / Share Database Summary NEW IN ACT! 2012	✓	✗
EXTENDED INTEGRATION:		
Outlook calendar synchronisation	✓	✗
Outlook contact synchronisation		
Google integration for Gmail, Google Contacts & Google Calendar NEW IN ACT! 2012	✓	✗
Inbuilt integration with Sage 50 Accounts	✓	✗
IMPROVED DATA IMPORT:		
Direct Import from Excel	✓	✗
Configure new ACT! fields during the import wizard	✓	✗
ACT! import result summary NEW IN ACT! 2012	✓	✗

ACT! 2012 Pro & Premium Upgrade Guide for ACT! 2010 Users

Sage ACT!

Compared to ACT! 2010, the latest 2012 edition features extended searches that find detail in attached documents like PDFs & MS Word files. Other improvements including an updated import wizard, Google integration & compatibility with Microsoft Office 2010 & Windows Small Business Server 2011.

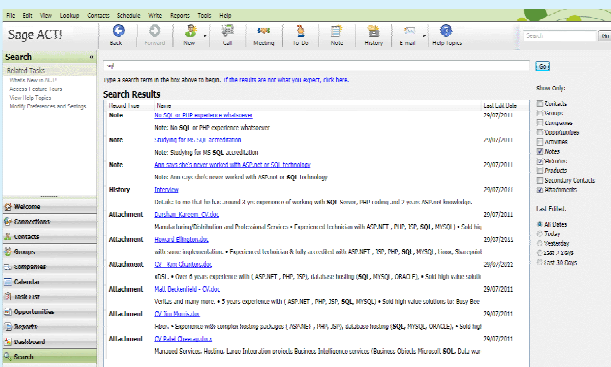
Universal Search

New universal searches find ACT! detail wherever it's stored including attached documents.

With more expansive searches, ACT! users keywords and phrases in attached files including: MS Word documents, PDF files & Microsoft Excel spread-sheets.

Searches can be filtered by criteria including: groups, attachments, histories, data range, opportunities and companies so you'll quickly find all the entries you want to work with.

Results are weighted according to matching items can be easily browsed with drill down for further analysis.



Increased compatibility

Compared to ACT! 2010 the latest ACT! 2012 software is compatible with:

- Windows Small Business Server 2011
- Firefox 4.0
- Internet Explorer 9
- Citrix Xen 5.0 & 6.0

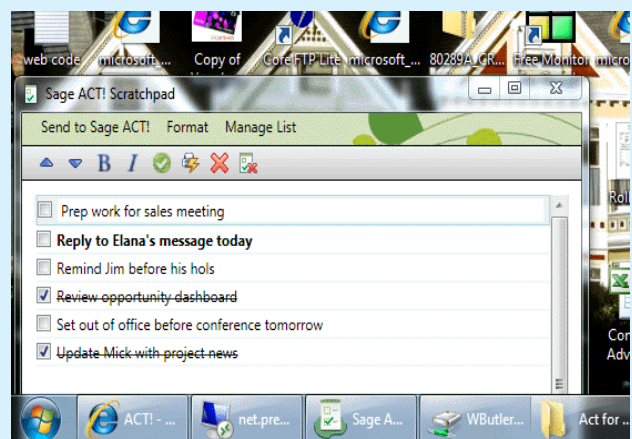
ACT! Scratchpad

ACT! 2012 includes a new Scratchpad application enabling users to quickly jot down information and manage processes that wouldn't immediately be stored in the main ACT! database.

As a virtual ACT! notepad, the Scratchpad is used to capture impromptu notes, contact detail and personal reminders - even if the main ACT! application isn't running.

Set priorities and check-off items once completed and send Scratchpad items to ACT! as activities, notes or history entries by assigning them to contacts.

Longstanding ACT! users may remember the Scratchpad as an evolved edition of SideACT that last appeared in Version 6.



ACT! 2012 Upgrade Guide for ACT! 2010 Users



Improved ACT! Data Import

- **Supports Excel:** Microsoft Excel data can now be imported directly without the need to convert spreadsheet sheets to CSV format
- **Add new fields:** Configure new ACT! fields on the fly as part of the ACT! import wizard
- **Import Summary:** Upon completion, ACT! summarises the number of records imported and reports any errors encountered.

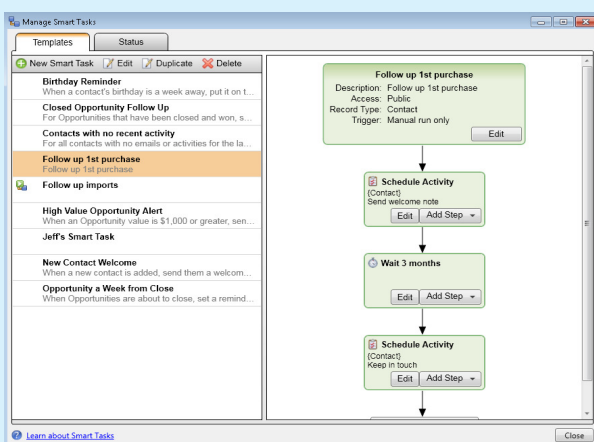
ACT! Smart Tasks

ACT! Smart Tasks provide a step up from the activity series by enabling users to trigger new tasks based on field updates.

In contrast to the ACT! activity series that is launched manually, Smart Tasks check contacts & automatically schedule activities in line with your criteria.

For example, Smart Tasks can be applied to:

- Schedule a reminder activity 1 month before renewal date
- Alert sales staff with a high priority activity if an opportunity hasn't been updated within x days
- Trigger a service review activity 6 months after a new customer is added to ACT!
- Schedule an activity if a customer territory changes



Smart Tasks are designed to remove the administration involved in scheduling activities. With Smart Task settings reminders users are alerted when action is needed for proactive communications.

Tighter Outlook Integration

For users that love to work in Outlook, ACT! 2012 provides the best of both worlds by integrating the two more tightly to sync up contacts & calendars.

Contact Synchronising:

- Create new Outlook Contacts from ACT! & create new ACT! Contacts from Outlook
- Control which ACT! Contacts sync to Outlook
- Keep contacts up to date regardless of where they were created or updated in ACT! or Outlook

Calendar Synchronising:

- Automatic ACT! & Outlook sync keeps schedules updated in both places upon adding or modifying activities and meetings.
- Calendars are always up to date, regardless of where entries were created or modified.
- Choose which ACT! activity types are synchronised with Outlook.
- Avoids duplicated calendar entries.
- Choose which system alarms appear in.

Google Integration

Google Apps users can now integrate ACT! with Gmail, Google Contacts and Google Calendar:

Gmail: Send & receive emails from Gmail or ACT! & save a history in the contact history for a complete view of all communications.

Google Contacts: Create new contacts in either Google or ACT! and synchronise your entire database, or just a subset, with Google to access contact detail in either interface.

Google Calendar: Sync ACT! and Google calendars automatically, or on-demand, and choose which ACT! activity types will sync to Google. Complete activities from either application and have updates applied when you next sync.

