

What's New in ACT! by Sage 2009 (11.0)

Question

You would like to know what's new in ACT! by Sage 2009 (11.0).

Answer

The ACT! 2009 (11.0) release takes a "you asked, we listened" approach as we've focused on making ACT! more usable. You receive powerful new features and significant enhancements to areas of the product that you use every day, such as Microsoft® Outlook® integration, calendar and activity visibility, and search functionality. All this enables you to work more effectively, become more productive, and better service your contacts. Based on input from you, we had focused on the areas of:



- E-mail Communication
- Search Capability
- Calendar Management
- Database Functions and Automation
- Compatibility with In-Market Solutions

E-Mail Communication

- New and improved Outlook integration features provide you with multiple options for tracking and organizing e-mails in ACT!, as well as options for staying on top of your day:
- Track and organize e-mail communications en masse or on a case-by-case basis; or automate these functions so you set them once and forget about them.
- Calendar integration features enable you to create ACT! activities from Outlook for tracking important action items received via e-mail, and copy your ACT! and Outlook calendars automatically or with just one click.

Features include:

- On-the-Fly E-mail History Recording:
- Select the ACT! history option you want recorded for Outlook e-mail messages to your ACT! contact directly from each Outlook e-mail message. Based the history option you choose on the significance of each individual e-mail you send.
- On-the-Fly E-mail History Recording in Multiple Databases:
- Keep a complete record of all your Outlook e-mail communications in ACT! for easy referencing, whether you are using one or multiple databases, with the ability to change the ACT! database on-the-fly when attaching Outlook e-mails.

En Masse E-mail Attaching:

- Select multiple Outlook e-mails and quickly attach those e-mails en masse to corresponding ACT! contacts at once for a complete record all you communications.

Flexible Outlook Rules and ACT!:

- In ACT!, you know have the option to use Outlook Rules, combining all the flexibility of Outlook Rules with a custom action you set for getting e-mails into ACT!. This "power user" feature enables you to manage e-mail messages received in your Inbox automatically, based on the criteria you set in Outlook Rules.

E-mail Send from the Notes Preview Pane:

- E-mail addresses are displayed as hyperlinks within the Notes preview pane so when you click on e-mail address, a "send e-mail message" window opens with the e-mail address automatically populated in the "to" field, making it easy to communicate.

ACT! Activity Scheduling from Outlook E-mails:

- Easily schedule ACT! activities from Outlook e-mail messages when you receive an e-mail requiring any type of action , so you can stay on top of your responsibilities and maintain valuable information in ACT!.

Automatic Calendar Copy:

- Automatically copy your ACT! and Outlook calendars using the ACT! Scheduler. This keeps your schedule up-to-date throughout the day without manual updating.

One-Click Calendar Copy:

- Copy your ACT! calendar to Outlook or your Outlook calendar to ACT! with just one click by accessing the calendar copy option directly from the main ACT! toolbar.

Streamline ACT! Setup Assistant for E-mail and Calendar Integration:

- Configuring the ACT! e-mail client and/or e-mail and calendar integration with Outlook is easy using the streamlined ACT! Setup assistant. Using non-technical terminology, ACT! Setup Assistant walks you through each of the steps.

Search Capabilities

- Lookups and search functionality have been streamlined, helping your find the details you need quickly, in one lookup-friendly place:
- Build the most basic or complex searches utilizing a tool that has been simplified and enhanced.
- Easily recall recent lookups, saving you time in your day.

Features include:

Easy and Powerful Lookups:

- ACT! Lookups have been streamlined to better meet your search needs, enabling you to quickly find data of interest. The "Lookup" dialog has not only been simplified, it has been enhanced with powerful search capability:
- Lookups are based on additional search operators enabling you to find what you are searching for based on only part of the name or title, you can simply search on the work "manager" and find all titles with that word such as sales managers, IT managers, and so on.
- You have the option to switch entities like Contact, Group, and Company, giving you the flexibility to modify your search without having to start the Lookup from scratch.
- Access to the "Advanced Queries" option is located in the main Lookup screen. The last lookup you performed will carry over so you can define your search even further without having to exit your current lookup.

Fast Access to Previous Contact Lookups:

- Quickly view your most recent Contact lookups with the streamlined "Lookup Previous" option containing the last several lookups you conducted. These lookups are categorized by: the lookup type, a date-and-time-stamp, and how many contacts were in the query. Next time you are multi-tasking, you can get back to the Contact lookup previously conducted with ease.

Calendar Management

- Improvements to calendar printing and viewing give you more visibility into your schedule so you can realize ultimate productivity gains.
- Improvements to calendar printing make it easy to get relevant snapshots of your schedule.
- Improvements to calendar viewing give you a beat on your schedule, plus your team's schedule at-a-glance

Features include:

Calendar Filters Applied on Printouts:

Print your ACT! calendar with the full benefit of the filters you have selected applied, including type, priority, date range, and users. This eliminates the need to re-set your print filters to match your ACT! calendar filters.

Contact Names on Monthly Printouts:

Easily see who is included in your upcoming meetings by viewing the contact names associated with any activity you have scheduled in ACT!, right there on your monthly calendar printouts.

First Name for Multiple Contact Meetings Viewable At-a-Glance:

Quickly determine who is included in the activities you have scheduled by mousing over that activity on your calendar and viewing the name of the first contact listed, not just "Multiple Contacts."

Activities Viewable for Teams Larger than 10 (Relevant only to ACT! Premium Solutions Users):

View the activities of all your team members, even if the team is larger than 10, to better understand the level of activity and types of activities your team has scheduled.

Database Functions and Automation

More database functions/automation options enable you to spend time managing what is most important to your bottom line, with the confidence of knowing your ACT! data is fully maintained.

ACT! now automatically handles periodic database maintenance tasks.

Know exactly how your ACT! sync is progressing with the streamlined ACT! sync progress bar.

Reduce the size of your backup files by excluding attachments.

Features included:

Automation of Important Tasks (ACT! Scheduler in ACT!) :

Automate important tasks, including calendar copying (feature not available in ACT! Premium for Web), database backups, and database maintenance in ACT! using the ACT! Scheduler. This keeps your database up-to-date, safe, and secure throughout the day, without manual updating.

Hourly Time Options for Automating Important Tasks:

New time options are available for automatic calendar copying (feature not available in ACT! Premium for Web), database backups, and database maintenance in the ACT! Scheduler, giving you the flexibility to automate these functions multiple times a day with the hours you specify.

Simplified Installation of a Remote Database:

Installation of a remote database has been significantly simplified, reducing the number of clicks required by approximately half. You no longer need to work through various menu options for installing a remote database. All you need to do is open or double-click the ACT! RDB file, click "ok," and ACT! does the rest.

Streamlined Sync Progress Bar:

Know exactly how your ACT! sync is progressing with the streamlined ACT! sync progress bar, including five steps with easy-to-understand terminology per step. You can see the length of time it will take for your sync to complete and determine which sync steps completed successfully.

Option to Exclude Attachments from Backups:

Reduce the size of your backup files by excluding attachments from ACT! database backups, allowing your backups to complete more quickly, particularly if you have a large number of attached documents.

Quick Information for Logged-in Users:

View the name of the logged-in user, the date and time of the last login, and the user's ACT! security role by mousing over the username included in the lower right corner of the screen. This eliminates the guesswork for ACT! administrators while configuring ACT! on other team members' computers.

