

# ACT!™

Growing Your Business with Contact Management Software



**best**  
software

insights for the life of your business™



## Growing Your Business with Contact Management Software

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## Introduction

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If you are like many business people, maintaining relationships with people and all the details associated with those relationships is a key part of your job. Throughout the course of your day, you're likely to communicate with customers, prospects, vendors, and business associates. Building and managing relationships is a vital part of business. A contact manager is software that helps people get the most from their business relationships.

Contact management software is an indispensable tool for sales professionals and others who deal with people, such as small business owners, consultants, agents, and brokers.

Simple address books and calendars may help you organize a few details around your valuable relationships, but contact managers provide much more. With contact management software such as ACT!® from Best Software, you have all the details of every relationship instantly accessible.

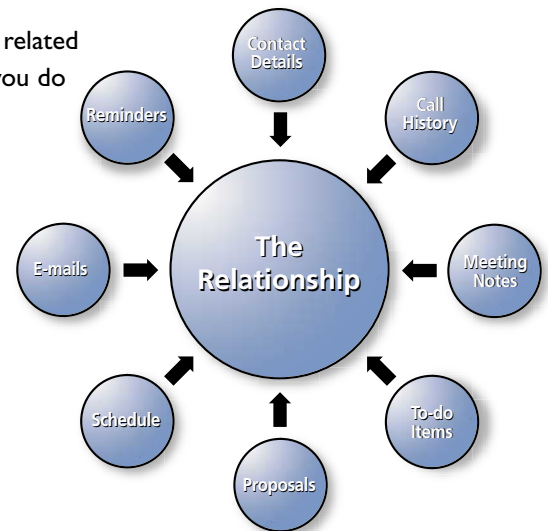
In this document, you'll learn about contact management software and how it can help you better manage business relationships to help you grow your business. You'll also learn the difference between contact management software and other technology solutions such as personal information management software (PIMs), collaboration and communication solutions such as Microsoft® Outlook®, and customer relationship management (CRM) software.

## What Is Contact Management?

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Contact management is the management of all the tasks and information related to developing and maintaining relationships with the people with whom you do business. It involves a variety of activities, including:

- *Managing all the details related to your contacts, such as addresses, phone numbers, e-mails, websites, notes, correspondence, documents, to-dos, and activities*
- *Following up with your contacts by telephone, fax, mail, and e-mail*
- *Sending personalized correspondence to your contacts*
- *Scheduling appointments and to-dos*
- *Maintaining accurate records of all your interactions*
- *Generating reports for reviewing activities and status*
- *Forecasting and tracking sales*



## What Is Contact Management Software?

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Contact management software automates and improves the processes of building and maintaining business relationships, freeing up your valuable time and enhancing your professional image. Time spent on routine tasks can be profitably spent interacting with business contacts in a consistent and organized manner.

Contact management software includes:

- *Ready-to use, easy-to-customize database(s) with quick search capability*
- *An integrated calendar that links to contacts*
- *Mail, fax, and e-mail merge*
- *Note-tracking*
- *Automatically generated history of completed calls, meetings, to-do items, and other activities*
- *Standard and easy-to-customize reports*

- Sales and forecasting tools
- Links to the Internet
- Synchronizes with popular handheld personal digital assistants (PDAs), such as Palm OS® and Pocket PC devices
- Integration to other leading software applications

Built on the foundation of a contact-centered database, contact management software provides comprehensive tracking and instant access to all information related to contacts.

"My business has grown and ACT! has kept me current with my customers by giving me instant access with ease and simplicity. I could not do without my ACT!"  
—Bob C., Calvert Consulting

## Who Can Benefit From Contact Management Software?

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Contact management software is designed specifically for relationship-driven professionals. Also known simply as "contact managers," these products make people more effective in managing relationships by helping them manage their interactions with people.

Contact management software has long been a secret weapon of successful salespeople. However, any businessperson who needs to grow his or her business can benefit significantly from a contact manager. Here are a few examples:

"ACT! is the program that drives my \$10 million business every day. Thanks for making my life easy with ACT!"

—Jana M., P.A., CRS, Keller  
Williams Realty, Sarasota, FL

- **Small business owners and managers** can keep track of customers, vendors, and business associates.
- **Consultants** can manage clients and prospects.
- **Real estate agents** can more effectively farm their territories by maintaining relationships with sellers, buyers, property owners, and other agents.
- **Public relations and advertising professionals** can manage clients, media, writers, printers, and graphic artists.
- **Recruiters** can track job candidates and clients to match people and companies faster and more efficiently.
- **Seminar and training professionals** can manage interactions with instructors, promoters, attendees, facility managers, and equipment suppliers.
- **Manufacturers' representatives** can track transactions and interactions with manufacturers and customers.
- **Banking and financial professionals** and brokers can maintain contacts with clients and financial product providers.

## How Contact Managers Differ From Other Solutions

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A wide variety of products are available to help business people deal with contacts and the details related to their relationships. Two solutions most closely related to contact managers are personal information managers (PIMs), and collaboration and communication solutions, such as Microsoft Outlook. Customer relationship management (CRM) fills the higher end of this category of software.

### Personal Information Managers (PIMs)

PIMs provide only a fraction of the capabilities of contact management software. While contact managers automate all the processes and tightly integrate all the information related to your contacts, a PIM typically includes a basic address book, calendar, and to-do list. Further, PIM components are often not integrated. For example, in a PIM you might have to reference your calendar, and then reference your contact list for details about the person you're meeting with. A contact manager allows you to access comprehensive information about your contact relationship in multiple ways, so you don't have to jump from module to module. PIMs often closely mimic paper-based address books, calendars, and to-do lists. In addition to the lack of integration among modules, PIM contact tracking functionality is rudimentary. For example, in a PIM there is limited, if any, capability to attach notes to contacts.

PIMs may be suitable for people who only need to store a few contacts and schedule simple appointments and to-dos. But relationship-driven business professionals seeking a means to track, instantly access, and manage every contact detail, are better served by a contact manager.

### Collaboration And Communication Solutions

Collaboration and communication solutions, such as Microsoft Outlook, are designed primarily to help users organize PC information and communicate and share this information among colleagues in a workgroup.

Collaboration and communication solutions typically include:

- *Calendar*
- *Task list*
- *Record keeping*
- *Address book*
- *E-mail*
- *Document management*

"For more than 15 years, ACT! has been taking care of contacts for small businesses."

—PC Magazine, "ACT! Better Than Ever," October 2002

A major difference between Outlook and contact management software is that Outlook is internally focused—facilitating sharing information and communicating within an organization, while contact managers facilitate the maintenance of relationships with people inside and outside an organization. Outlook focuses on maintaining the user's personal information, and only basic information about the user's contacts.

Outlook is built on the integration of four components: e-mail, a scheduling manager, an address book, and document management capability. As a result, it is well suited for coordinating the activities of a workgroup or team in that it facilitates collaboration and communication within the group, and it provides document flow control.

In contrast, contact managers are built on a contact-centered database and are designed for the day-to-day management of contact information in an individual or small group environment.

Ideally, a contact manager should provide tight integration with Outlook, allowing users to collaborate and communicate seamlessly and effectively with internal teams and build and maintain relationships around their contacts.

## **Contact Management vs. Customer Relationship Management (CRM)**

Like contact managers, CRM solutions such as SalesLogix®, also from Best Software, help businesses build and manage customer relationships. There are, however, several major differences. Among them, CRM solutions:

- *Offer integrated marketing and support modules*
- *Are designed around the concept of account management*
- *Typically scale larger than contact managers*
- *Are more expensive than contact managers*
- *Are often more complex to implement and use*

Contact managers are designed for individuals, small businesses and corporate workgroups. CRM solutions are software suites that provide contact management capabilities, in addition to integrated marketing and support functions. As a result, CRM target customers are typically larger organizations with complex needs. Due to the differences in scale and complexity, contact managers are less expensive and typically quicker to implement than CRM solutions.

## **Overview of ACT!**

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ACT! is the best-selling contact manager, and has been since the first version debuted in 1987. Today, ACT! enjoys more than 4 million users worldwide, including 15,000 corporate accounts.

Here's a detailed overview of the benefits you will enjoy by using ACT! contact management software:

### **Manage All Your Customer Information In One Place**

ACT! comes with a ready-to-use, full-featured database that stores complete information on all your contacts. In addition to tracking standard information, such as name, company, phone numbers, addresses, e-mail addresses and websites, ACT! provides over 70 fields which can be easily customized. ACT! also allows you to enter unlimited, date- and time-stamped notes for each contact. If you're switching to ACT! from another solution, importing data is easy using the included Import Wizard.

As you deal with your contacts—sending correspondence, scheduling and completing activities, and so on—ACT! automatically generates a history for you, so you'll always be on top of the relationship details.

When a contact phones you, use ACT!'s Lookup and Keyword Search feature to instantly locate all the details about your relationship. With ACT!, important documents related to your contacts, such as letters, contracts, presentations, Web pages, and more, are instantly accessible.

There's also an e-mail client that works with Microsoft Outlook, Outlook Express, Internet Mail and Lotus Notes so you can create, send and track e-mail messages to and from your contacts. ACT! also includes standard and customizable reports so you can analyze your contact data any way you like.

As your business grows, ACT! grows with you. Create additional databases, and add additional ACT! users to your group—ACT! is network-ready out of the box.

## Customize ACT! To Work Like You Do

Unlike many products that make you switch your way of doing things, you can tailor ACT! to match the way you conduct business. In addition to adding databases and customizing fields, you can customize screen layouts to create the look and feel you want, ranging from simply adding your corporate logo to the background of all views, to custom tailoring every view. You can also customize the icon bar and menus for maximum efficiency. And, you can create macros to automate repetitive tasks and save time.

## Stay On Top Of Your Schedule With Ease

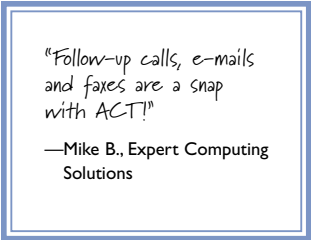
With ACT!, you can quickly and easily schedule unlimited calls, meetings, and to-dos; and then view and print your schedule by day, week, or month. Even recurring events are scheduled in one easy step. With ACT!, you can set alarms to be reminded of important events—even when ACT! isn't running. Using the built-in Task List, you can filter your calls, meetings, and to-dos by priority, date-range, or user with a couple mouse clicks. At the end of the day, you can roll incomplete activities over to the next day.

If you're part of a team that uses Outlook to facilitate internal communication and collaboration, ACT!'s tight integration makes it easy to synchronize your ACT! calendar with your Outlook calendar.

There are many ways to take ACT! on the go. ACT! prints to 20 supported calendar formats including Day-Timer and DayRunner. And, ACT! provides extensive synchronization capabilities with Palm Powered™ handhelds and Pocket PC devices via ACT! Link software.

## Create And Send Personalized Letters, Faxes, And E-Mails

Use ACT!'s Word Processor with built-in spell-checker, or use Microsoft Word 2000/2002(XP) to create quick and easy personalized correspondence, including mail merge letters, faxes, e-mails, envelopes, and mailing labels. ACT! includes templates for standard documents, making follow-up easier than ever. ACT! links all of your correspondence to the associated contact for a complete record of everything that has been sent and received. For professional-quality e-mail marketing, ACT! includes customizable HTML templates.



*"Follow-up calls, e-mails  
and faxes are a snap  
with ACT!"*

—Mike B., Expert Computing  
Solutions

## Meet Your Sales Goals With Confidence

Managing your sales pipeline is easy using ACT!'s built-in forecasting tools. You can choose one of the pre-formatted sales reports, or create your own, to analyze your sales pipeline, sales by customer, sales by account manager, sales totals, and more. Tracking opportunities through the sales cycle is easy with the graphical sales pipeline report, showing your open, won, or lost sales for any timeframe you choose.

## Share Complete Customer Information In A Workgroup Environment

ACT! is perfect for teams that want a ready-to-use, multi-user solution right out of the box. ACT! enables users to share databases over a network by incorporating record-locking and password protection for easy and safe sharing of data. It also synchronizes remote workers via e-mail, so everyone has the most up-to-date contact information. In addition, ACT! for Web is available to enable workgroups to access, update, and share ACT! information in real-time over the Web—without database synchronization or software required for remote users.

To facilitate group scheduling, ACT! enables users to view shared calendars, while users can schedule both private and public activity types, and filter what is displayed to others. And, ACT! easily synchronizes with Outlook calendars, for accurate scheduling in mixed-use environments.

## Seamlessly Integrate With Microsoft Outlook

*"ACT! is second to none and without a doubt has made our business more profitable and easier to operate."*

—Alex K., Kapteyn & Sons  
Pianos

Because of the synergy between the two products, ACT! provides integration of its extensive contact management features with the powerful collaboration and communication capabilities of Outlook.

ACT! imports contacts directly from Outlook 2000/2002(XP), so there's no need to re-enter your contact information. ACT! synchronizes with your Outlook calendar, so you can view activities scheduled in Outlook from ACT! and vice versa. ACT! also integrates with Outlook e-mail so you can access your Outlook Inbox and other folders from within ACT! to track e-mails sent and received for every ACT! contact. You can also use your ACT! database as an address book to send e-mails from Outlook to ACT! contacts, create history for those messages, and attach received mail in Outlook to any ACT! contact.

## Synchronize With PDA Handhelds

ACT! easily imports Palm Desktop information including Address Book, Date Book, and To-do items. Synchronize your ACT! calendar, contact, and to-do information along with notes and history items to any Palm Powered handheld including Palm, Handspring, Kyocera, Sony, and more. Contacts and events added to your Palm are also synchronized back to ACT!. And with ACT! Link for Pocket PC, you can synchronize your ACT! calendar, contacts, and to-do items with Pocket PC devices from Compaq, HP and others. In addition, ACT! for Palm OS™ is available, providing a powerful contact management solution designed specifically for Palm OS handhelds.

## Print To Popular Paper Organizer Formats

ACT! prints to over 20 popular paper organizers, including Day-Timer, DayRunner, Deluxe, Time Design, TimeSystems, Avery, and Franklin formats. Choose from daily, weekly, and monthly calendars, as well as a variety of address book formats.

## Use ACT! With Other Popular Products

ACT! integrates with popular software products so you can easily build your own best-of-breed solution. For example, use Microsoft Word 2000/2002(XP) to create one-click mail-merge letters, faxes, and more. ACT! also works with WinFAX.

To integrate your front office and back office solutions, ACT! Link software is available to integrate ACT! with popular accounting software. This integration will give you an accounting view of your contacts from within ACT!, including invoices, credit information, order information and much more. This integration also eliminates wasteful duplicate data entry. ACT! Links provide accounting integration for the following products:

- Peachtree Accounting for Windows 2002/2003
- MAS 90 and MAS 200
- QuickBooks Pro/Premier 2002

*"I couldn't do my job and win sales awards without ACT!"*

—Barry H., Advanced  
Drainage Systems, Inc.

## Enjoy ACT! on the go With ACT!® for Palm OS®

ACT! for Palm OS is the first complete contact management system designed specifically for Palm OS handhelds. Now ACT! users have a preferred option of running ACT! on both their PC and their Palm, rather than synchronizing between ACT! on their PC and the Palm Desktop application. With ACT! for Palm OS, you'll get a handheld version of the powerful contact manager that you use on your PC. Like the PC version, ACT! for Palm OS includes a powerful database that tracks notes, histories, activities, and sales opportunities, along with a linked calendar and task list—all integrated into one easy-to-use application. Now you can have your ACT! with you everywhere—whether in the office or on-the-go.

## Access ACT! Over the Web With ACT! for Web™

ACT! for Web™ enables you to access, update, and share ACT! in real-time using Internet Explorer—no synchronization required. ACT! for Web is installed on your Web server, so you keep your valuable customer data inside your company network—not hosted by a third-party like other online and .com solutions. Also, there's no monthly fee—you own the software.

*"ACT! brought our sales and product teams together. In the past we worked as individuals, now we ACT! as a team."*

—Kurt H., Panalpina, Inc.

It's easy to install and customize without IT consultants, and no software is required for remote users. And because ACT! for Web is just as easy to use as ACT!, with similar functionality and navigation, you and your team will be up and running in no time.

## See How ACT! Can Help You Grow Your Business

*"I rely on ACT! to make sure I have contacts at my fingertips with ACT! and my PDA. Thank you for making my job easier."*

—Rivers B., Florida  
Department of State

For more than 15 years, ACT! has been managing contacts for individuals, small businesses, and corporate teams. Its practicality and ease of use made it an immediate hit. And now, ACT! is the leading relationship management tool for more than 4 million users worldwide.

To see for yourself how ACT! can help your business grow, call 1-888-855-5222, or visit [www.act.com](http://www.act.com), where you can purchase your own copy of ACT!, or download a free 30-day trial.

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For information on ACT! individual licensing, please call:  
1-877-501-4496.

For information on ACT! workgroup licensing, please call:  
1-888-855-5222.

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