

List of ACT! 2009 features	ACT! 2009 (v11)	ACT! 6.0	ACT! 2005	ACT! 2006	ACT! v8/9 '07	ACT! v10 '08
Contact and Customer Management		Find the version you are currently using - any "ticked" features represent what you will receive if you upgrade				
Separate Notes and History tabs		✓				
Notes and History shared between Contacts		✓				
Unlimited Secondary Contacts		✓				
Rich Text Formatting including colours, bullets, graphics, URLs		✓				
Attach documents to Activities and History		✓				
Synchronise attachments		✓				
Groups with 15 levels of hierarchy (14 subgroups)		✓				
Dynamic Membership		✓				
Split Panel Notes Preview		✓	✓	✓		
Hyperlink to Companies from Contact List View		✓	✓			
Specify Linked Contact/Company fields ¹		✓	✓	✓		
Print any ACT! Calendar template with the contact phone number			✓			
View all group associations			✓			
Duplicate checking for groups and Companies		✓	✓	✓	✓	
Advanced Queries for Groups and Companies			✓	✓	✓	
List Edit Mode			✓	✓	✓	
Duplicate checking by first and last name			✓	✓	✓	
Company Management						
Company Records		✓				
Contacts linked to Companies		✓				
Tree view for Companies		✓	✓			
Intuitive Interface						
Streamlined Setup Assistant		✓	✓	✓	✓	✓
Lookups and Searching						
Lookup indicator ²			✓	✓		
Edit existing Queries ²			✓	✓		
Advanced Keyword Search ²			✓	✓		
Save Lookups as Groups		✓				
Easy and powerful Lookups		✓	✓	✓	✓	✓
Fast access to previous contact Lookups		✓	✓	✓	✓	✓
Sales Opportunity Management						
Opportunity list view		✓				
Opportunity Lookups		✓				
Instant Quotes ^{3 2}		✓				
Multiple built-in ACT! Sales processes		✓				
Track multiple products		✓				
Generate and import product list ⁴		✓				
Opportunity data fields		✓	✓	✓		

Calendar and Activity Management ACT! 2009 (v11)	ACT! 6.0	ACT! 2005	ACT! 2006	ACT! v8/9 '07	ACT! v10 '08
Rich text formatting in Activity details	✓				
Five calendar views including daily, weekly and monthly	✓				
View Global events	✓				
Change activity organiser		✓			
Automatic Outlook calendar sync ²	✓	✓	✓	✓	✓
ACT! Activity scheduling from Outlook e-mails	✓	✓	✓	✓	✓
One-click calendar copy	✓	✓	✓	✓	✓
Calendar printing improvements	✓	✓	✓	✓	✓
Calendar visibility improvements	✓	✓	✓	✓	✓

Prospect and Customer Communications

Built-in spell checker	✓				
Improved Mail Merge	✓				
Validate and correct address during Mail Merge	✓				
ACT! E-mail Find	✓				
Use ACT! as Outlook address book	✓				
ACT! E-mail Client integrated with Outlook®, Outlook Express or Lotus Notes®		✓			
Create ACT! Contacts from Outlook e-mail ⁵	✓	✓	✓		
Attach Outlook e-mail to ACT! Contacts ⁵	✓	✓	✓		
Specify default history types and create ACT! history from Outlook ⁵	✓	✓	✓		
Use flexible Outlook Rules in ACT!	✓	✓	✓	✓	✓
Last e-mail field	✓	✓	✓		
En masses E-mail attaching	✓	✓	✓	✓	✓
E-mail send from the Notes Preview Pane	✓	✓	✓	✓	✓

Dashboards and Reporting

ACT! Dashboard	✓	✓	✓	✓	
ACT! Premium Dashboard with team views	✓	✓	✓	✓	
20+ preformatted/streamlined sales reports	✓				
Graphical sales pipeline with drill down to see opportunity details	✓				

Data Sharing and Security

Group scheduling	✓				
Manage resources including conference rooms and equipment	✓				
Five security levels	✓				
Mark Notes and Opportunities en masse	✓	✓	✓		
Field level security	✓	✓	✓		
Company security ⁶	✓	✓	✓	✓	
Group and Company security ⁷	✓	✓	✓	✓	

Customisation

Share drop-down lists across different fields	✓				
Fields types – Picture, Yes/No, Memo and E-mail	✓				
Customisable drop-downs; utilise multi-select values ⁴	✓				
Customisable Priority, Activity and History types ⁴	✓				
Customisable opportunity field names and types with drop-down lists ⁴	✓	✓			



Administration	ACT! 2009 (v11)	ACT! 6.0	ACT! 2005	ACT! 2006	ACT! v8/9 '07	ACT! v10 '08
Scalability to accommodate larger teams ⁸	✓					
View team memberships ⁴	✓	✓				
Grant Contact access en masse ⁴	✓	✓				
Lookup Contacts by access	✓	✓				
Custom user permissions	✓	✓				
Automatic database sync and backup ⁴	✓	✓				
Automatic database maintenance	✓	✓	✓			
Password rules	✓	✓	✓			
Query-based sync	✓					
Improved administration for remote users ⁴	✓	✓				
Support for Non-Local Machine Administrators ^{9 4}	✓	✓				
Silent Install ¹⁰	✓	✓	✓			
ACT! Scheduler in ACT!	✓	✓	✓	✓	✓	✓
ACT! Scheduler with hourly options ¹¹	✓	✓	✓	✓	✓	✓
Simplified installation of a remote database	✓	✓	✓	✓	✓	✓
Streamlined sync progress bar	✓	✓	✓	✓	✓	✓
Option to exclude attachments from backups ¹¹	✓	✓	✓	✓	✓	✓
Quick info for logged-in users	✓	✓	✓	✓	✓	✓

Mobile and Remote Access

Blackberry® ¹²	✓	✓				
Citrix® or Terminal Services ¹³ support	✓	✓				

Microsoft Office Integration

Tighter Outlook integration	✓	✓	✓	✓	✓
Export to Excel®	✓				

Accounting Integration

Peachtree by Sage and QuickBooks® Professional/Premier		✓			
Simply Accounting by Sage, Sage MAS 90 and Sage MAS 200 and Sage BusinessWorks	✓	✓			



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- 1 Not all fields can be linked and linked field types must be compatible
- 2 In ACT! Premium for Web this feature may behave differently
- 3 In ACT! Premium for Web administrative functions must be performed on the web server
- 4 Requires Microsoft Excel and Word 2002, 2003 or 2007
- 5 This feature is not available in ACT! Premium for Web
- 6 You must purchase one license of ACT! per user
- 7 Scalability will vary based on hardware and size and usage of your database.
- 8 Limited access group and company names will be viewable from the tree view, but all associated information will remain inaccessible
- 9 In order to edit, add or remove Dashboard components you must have an ACT! Manager or Administrator security role
- 10 Delivered as an MSI package, software to distribute MSI package is not included. Silent Activation on machines requires internet access. Users must be machine administrators in order to activate
- 11 Requires additional purchase
- 12 Citrix and Terminal Services require specific configurations. Citrix is supported using Presentation Server 3.0 and 4.0
- 13 This feature is only available in ACT! Premium for Web on machines running Safari browser on a Macintosh® OS. The ACT! Word Processor and Microsoft® Outlook® integration are not available using this feature.
- 14 Available upon request



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