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ACT! by Sage 2009

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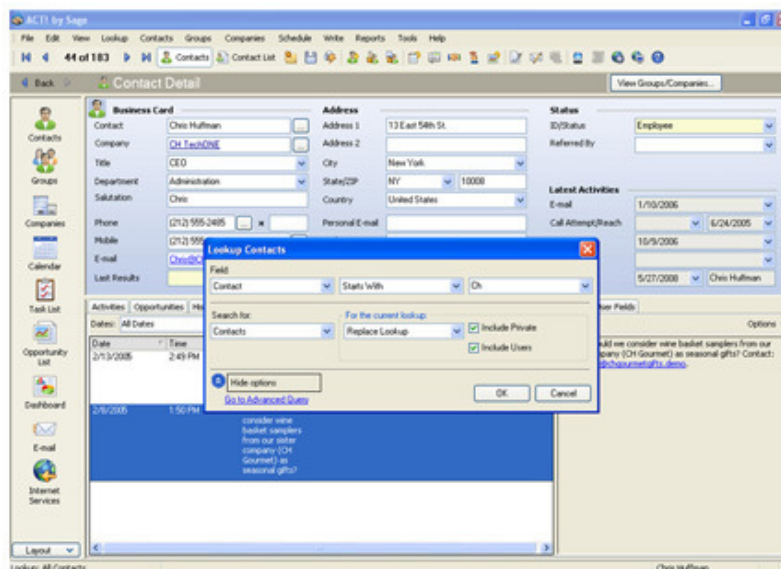
April 21, 2009

URL: <http://www.zdnet.com.au/reviews/software/applications/soa/ACT-by-Sage-2009/0.2000065797.339296032.00.htm>

ACT! by Sage is a very popular Customer Relationship Management (CRM) software application that's used to keep track of client and prospect details in a single database that can be shared by multiple users.

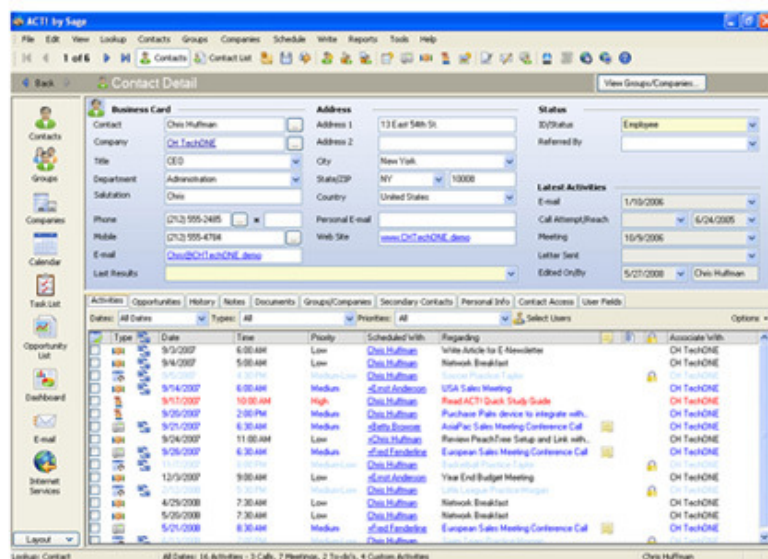
First released in 1991, it has become one of the pioneers in the CRM category and now boasts a user base of over 2.7 million registered users — including more than 41,000 corporate customers. What's so appealing about ACT!, especially for larger businesses, is that it integrates seamlessly with Microsoft Word and Outlook (as well as other Microsoft Office software) to generate and track communications with the contacts maintained in ACT!

ACT! by Sage 2009 delivers improved Outlook integration, better calendar and activity visibility, and enhanced database search capabilities, all of which should help your company to grow sales, save time and reduce operating expenses. Other neat features include en-masse email attaching (select multiple Outlook emails from different senders and attach them to ACT! contacts), activity scheduling from emails (create ACT! activities within Outlook emails with the contact and regarding/subject line pre-populated) and one-click calendar copying (copy an ACT! calendar to an Outlook calendar quickly from the main ACT! toolbar). All the database operations in ACT! are handled by Microsoft SQL Server, but you're shielded from it and need hardly be aware that it's there. Up to 10 users can share the same database, with one machine acting as the server and the others as clients.



ACT! by Sage 2009 features look-ups that let you search by part of a name or title.
(Credit: CBS Interactive)

The 2009 version of ACT! boasts improved productivity features too. These include simplified look-ups that let you search by part of a name or title, and the ability to switch between contact, group or company to modify a search without starting again. Also, advanced queries from the main look-up toolbar now carry over previous searches for refining. Access to previous contact look-ups is quicker, as you can view the last several contact look-ups by type, date, timestamp and number of contacts in a query. Calendar filters can now be applied on printouts, allowing you to output an ACT! calendar with selected users, type, priority and date range applied.



The ACT! Interface distills a lot of information, but can become daunting — especially for newcomers.
(Credit: CBS Interactive)

The ACT! interface is similar to that of earlier versions, so it still does a great job of gathering many kinds of contact information on a single screen. For instance, you can view a summary history of your relations with a contact on a single crowded list, or expand each item to see details of your phone calls, meetings, notes, alerts and anything else related to a single contact, a group of contacts or a whole company. The only downside is that new users may struggle to perform only moderately difficult tasks, and once you start working with a large number of contacts, organised into groups or companies, the challenge can become daunting.

What's invaluable about ACT! is that it not only tracks your communications with customers, but it also lets you build mailing lists on paper or email, alerts you with to-do lists, and shares your calendar and other data across your company. It can even launch emails from Outlook or fire up Word to send mass mailings. You can import your Outlook contacts, calendar and notes, and then organise them into categories of groups and companies for easy management. The software is also smart enough to print out your calendar using the same filters that you use when displaying it on-screen.

The only downside with ACT! is its technical vocabulary, which will be daunting for newcomers — you should be prepared for a steep learning curve before mastering the software. You also need to consider the 50 per cent upgrade fee: we're not sure that the 2009 version offers enough to users of ACT! 2008 (v10), but if you're running an earlier version an upgrade is pretty much essential.

Small businesses seeking robust, powerful and affordable CRM software will find that ACT! by Sage 2009 fits the bill perfectly.

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