

Features	ACT! by Sage	ACT! by Sage Premium	ACT! by Sage Corporate Edition
Be More Productive			
Activities tied to contact records	✓	✓	✓
Editable priority, activity, and history types	✓	✓	✓
Activity series ³ for activities with multiple steps	✓	✓	✓
Activity rollover	✓	✓	✓
Multiple calendar views	✓	✓	✓
Filterable task list view	✓	✓	✓
Activity alarms	✓	✓	✓
Calendar pop-ups	✓	✓	✓
Calendar access by user	✓	✓	✓
At-a-glance user availability ⁴		✓	✓
Manage and define resources		✓	✓
Conflict notification		✓	✓
Activities for 10+ users viewable on your ACT! calendar		✓	✓
Market Effectively			
E-mail marketing ⁵	✓	✓	✓
Drip marketing ⁵	✓	✓	✓
Survey and Web forms ⁵	✓	✓	✓
Marketing results tab ⁵	✓	✓	✓
Attach e-mails to contacts	✓	✓	✓
Preformatted templates for e-mails and letters	✓	✓	✓
Mail merge to contacts and groups	✓	✓	✓
Validate and correct addresses during mail merge	✓	✓	✓
History of all customer correspondence	✓	✓	✓
Sell More			
Opportunity note, history, activity, and document tracking	✓	✓	✓
Product and service tracking	✓	✓	✓
Built-in ACT! sales stages	✓	✓	✓
Opportunity date fields	✓	✓	✓
Opportunity designations as open, closed-won, closed-lost, and inactive	✓	✓	✓
Instant quotes ^{4,6}	✓	✓	✓
Filterable opportunity list view	✓	✓	✓
Opportunity list export to Microsoft® Excel®	✓	✓	✓

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Measure Results			
Interactive activity, opportunity, and user dashboards	✓	✓	✓
Dashboard targets	✓	✓	✓
Dashboard with team views		✓	✓
Interactive pipeline report with drilldown capability	✓	✓	✓
50+ preformatted report templates	✓	✓	✓
Export reports to Excel, HTML, PDF, or e-mail	✓	✓	✓
Activity reports by user		✓	✓
Connector for third-party report writers	✓	✓	✓
Share and Secure			
Data sharing with 1-10 users	✓	✓	✓
Data sharing with 10+ users		✓	✓
Viewable team memberships		✓	✓
Secured contacts, notes, history, and opportunities	✓	✓	✓
Field level security		✓	✓
Company security ⁷	✓	✓	✓
Group and company security ⁷		✓	✓
Five security roles for users	✓	✓	✓
User permissions and access specifications	✓	✓	✓
Password rules	✓	✓	✓
Personalize³			
Layout designer for editing layouts	✓	✓	✓
Field types designated as date, currency, yes/no, expansive memo, and picture	✓	✓	✓
Remove, edit, or add fields	✓	✓	✓
Add values to drop-downs	✓	✓	✓
Customizable menus ⁴ , toolbars, columns, and navigation bar	✓	✓	✓
Customizable sales processes	✓	✓	✓
Customizable opportunity field names and field types	✓	✓	✓
Customizable dashboards with the dashboard designer	✓	✓	✓
Customizable reports with the report designer	✓	✓	✓
ACT! online community for free downloads	✓	✓	✓
ACT! Software Development Kit (SDK)	✓	✓	✓
Enhancement solutions developed by third-party ⁸ vendors	✓	✓	✓
Access			
Online access			✓
Offline access	✓	✓	✓
Mobile access, including BlackBerry® and iPhone™ ⁹	✓	✓	✓
Citrix® or terminal services	✓	✓	✓

