

# ACT!

For Financial Professionals | What's New

## ACT! by Sage for Financial Professionals 11 Further Streamlines your Productivity

ACT! for Financial Professionals 11 is packed with powerful new features and significant enhancements to areas of the product you use every day. Enjoy new features like the ability to establish relationships between contacts, tighter integration with Microsoft® Outlook®, better search capabilities, database automation, and more!

### Leverage Relationships between Your Contacts

The new Related Contacts feature consolidates the Householding and Advisor tabs and allows you to connect contacts to one another, define the nature of the relationship, and enter any additional details about the relationship. For instance, you can define relationships between accountants, partners, attorneys, and friends of friends. So next time you speak with your clients, you can quickly recall the details of your recent conversation with their close friend, accountant, or another important player in their financial planning.

### Track and Organize E-Mails and Your Schedule

New and improved Outlook integration features allow you to track and organize e-mails in ACT! en masse or on a case-by-case basis. Or you can automate these functions so you can 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.

### Find the Exact Details You Need

Lookups and search functionality have been streamlined, helping you find the particular client information you need quickly, in one lookup-friendly place. Build the most basic or complex searches using a tool that has been simplified and enhanced. And easily recall recent lookups to save time in your day.

### Get More Done in a Day

Enhancements include improved calendar printing and viewing, Dashboard drill-down functionality, a "Yesterday" filter on Task and Opportunity List views, a history icon on the standard ACT! toolbar, and additional options for alarm reminders.

### Enjoy Streamlined Installation and Database Functions

The ACT! installation experience has been streamlined, requiring fewer clicks to get started. And ACT! automatically handles periodic database maintenance tasks, automatic scheduling, a streamlined ACT! sync progress bar, and more.

### BENEFITS SNAPSHOT

Leverage relationships between your contacts.

Track e-mails and appointments with tighter Outlook integration.

Find exact details with streamlined Lookups.

See snapshots of your schedule.

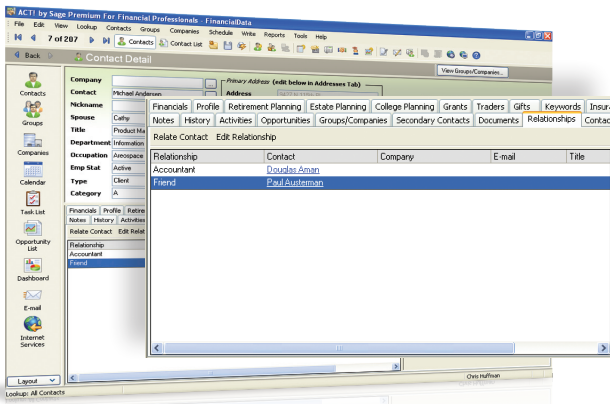
Get more done with usability enhancements.

Start using the new version more quickly with streamlined installation.

Feel confident about your data with database maintenance enhancements.

CALL 1-866-903-0006

CONTACT YOUR ACT! CERTIFIED CONSULTANT | VISIT [WWW.ACT.COM/UPGRADE](http://WWW.ACT.COM/UPGRADE)



- Use the powerful new Related Contacts feature to establish and describe relationships between your contacts for a more comprehensive view of all players related to a deal.

## For ACT! by Sage for Financial Professionals 9.0 Users

If you're still using ACT! for Financial Professionals 9.0, you will also see the following new features that were made available in the ACT! by Sage for Financial Professionals 10.0 release:

### Record Insurance and Annuity Information in New Tabs

The new financial services-specific Insurance and Annuities tabs capture a comprehensive picture of clients' insurance policies and annuities to give you more information to better support and advise your clients.

### Gain Performance Insight with the Interactive Dashboards

Use ACT! for Financial Professionals interactive Dashboards for an at-a-glance view of key information like activities and opportunities, allowing you to drill down into this information and take further action directly from the Dashboards views.

### Improve your Efficiency with Usability Enhancements

Improve your overall efficiency with usability enhancements to common features in ACT! for Financial Professionals, including the ability to edit any contact field directly from a list view, quickly identify the last time you communicated with a client or prospect, and add document shortcuts to Activity and History items.

**"I think you have it down right! This software is like my right AND left arm! I don't know what I would do without it - AND IT JUST KEEPS GETTING BETTER!!!!!"**

— ACT! for Financial Professionals Beta participant

#### About ACT!

The #1 selling contact and customer management solution for over 20 years, ACT! by Sage continues to bring the latest, most intuitive technology to businesses across the globe. ACT! solutions have more than 2.8 million individual users and 48,000 corporate customers in 25 countries, including individuals, small businesses, selling professionals, and corporate teams. Because ACT! solutions support an "anywhere" workforce with seamless online, offline, and mobile access solutions, they work for any business environment. With ACT!, you can achieve maximum productivity so you have time to focus your attention on business-critical activities, provide a better customer experience because you understand the intricate needs of your contacts, and make informed decisions to advance your business.

#### About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

**Important Note:** Sage recommends you carefully review all ACT! system requirements at [www.act.com/2009systreq](http://www.act.com/2009systreq) to ensure your system meets these requirements. **Compatibility:** ACT! for Financial Professionals 11 cannot be used in conjunction with ACT! Premium for Financial Professionals 11, and both cannot be used in conjunction with ACT! 2009, ACT! Premium 2009, or ACT! Premium for Web 2009. **Regarding ACT! for Palm OS®:** ACT! for Financial Professionals 11 solutions are not compatible with ACT! for Palm OS 2.0. **Regarding ACT! Add-on Solutions:** Certain ACT! add-on solutions may not be compatible with ACT! for Financial Professionals 11 solutions. Please visit [www.actcsolutions.com](http://www.actcsolutions.com) or check with your add-on product provider to determine compatibility.

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