

**Volume 3
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Headline News

Add-On Solutions

More than 40 partner solutions are already available as add-ons for ACT! 2007. These add-on solutions cover a diverse array of global and industry-specific functionality.

Give us a call to see if your solution is compatible with ACT! 2007.



ACT! 2007

Stronger Microsoft Outlook Integration

Sage Software recently announced the availability of the ACT! by Sage 2007 (9.0) Product Family. In this article we'll detail the new features included in both ACT! by Sage 2007 and ACT! by Sage Premium for Workgroups 2007.

ACT! 2007

Outlook Email Client

Outlook users will appreciate the option in ACT! 2007 to set Microsoft® Outlook® as your preferred email client. ACT! will launch the Outlook new email form when you begin an email while in ACT!. Send an email, send a letter in email, conduct an email mail merge, or send an email by clicking on hyperlinks. You can send an email to a Group or Company and the email address will populate with all members of that Group or Company. The Microsoft Outlook integration features require Microsoft Outlook 2000, 2002, or 2003. During setup, users must select if they want to access Outlook E-Mail through the ACT! email client or direct integration with Outlook.

ACT! History Records From Outlook

It's frustrating when you send an email in Outlook and then must remember to visit the ACT! email client and associate that sent message with a contact. ACT! 2007 provides an easy solution. As you create a message in Outlook, you can spec-

ify default ACT! history types for email sent. Just type in the email address or select from either the Outlook or ACT! address books. As your message is sent, ACT! will automatically attach a history record to the ACT! contact matching the email address in the To, CC, and BCC fields. Choose from one of three default history types; subject line, subject line and message, and email attachment. For this and the two features following, ACT! must be added as an Outlook address book to use the feature.

Attach Outlook Email

Messages you receive in Outlook can be attached to an ACT! Contact Record according to the ACT! default email history option you have selected. This gives you a complete view of all customer communications.

Add New ACT! Contacts

ACT! 2007 allows you to create a new ACT! Contact record directly from an Outlook email. Select this option and ACT! will fill in the Contact Name and Email Address fields for you, and you can then fill in up to 10 additional predefined fields such as Company, Address, and Phone Number, ensuring you gather complete details for your new Contact. ACT! will check for duplicates before adding a contact.

View Last Communication

In ACT! 2007, you are able to quickly identify



As your email message is sent, ACT! will automatically attach a history record to the ACT! Contact.

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ACT! 2007 CONTINUED

the last email send date for a contact using a new Last Email field. Combined with a Last Reach, Last Attempt, Last Meeting, and Last Letter fields you have a quick way to view all your recent communications with a contact.

When you are using the ACT! email client integrated with Outlook, the Last Email field will update when an email history record is created.

Improved Search Capabilities

In ACT! 2007 a new Advanced Keyword Search is introduced that will dramatically improve your search power. Now you can perform a keyword search and be taken automatically to the exact location of your keyword. Advanced Keyword Search locates and highlights terms in Contact, Group, and Company Detail views. It will even open a note, history, activity, or opportunity—highlighting the keyword so you can quickly locate the information you need.

New Split-Panel View

In ACT! 2007, you can view multiple notes at once. You can view the entire contents of a Contact, Group, or Company Note while simultaneously scrolling for another note using the split-panel option within the Notes tab. Just highlight the note from a list of notes on one side to quickly view the full contents of that note on the other side of the split-panel.

Keep Information Up To Date

There are certain fields in a Company Record, such as address or Web site, that when changed will most likely want to be changed for each Contact associated with the company. In ACT! 2007, you can specify which fields you want linked between the Company and Contact Records so when a field is changed on a company record, you are prompted to change that field for all Contacts linked to the Company record. Note: Not all fields can be linked and linked field types must be compatible.

Lookup Or Entire Database?

Sometimes it is difficult to determine whether you are viewing records associated with a

lookup you performed or whether you are viewing your entire contact list. ACT! 2007 adds a new Lookup Indicator that will give you the answer. The Lookup Indicator appears in the lower-left corner of the screen and indicates the type of lookup you are conducting—whether it's all Contacts, State, ID Status, or one of the other available lookups within ACT!.

Password Settings

Data security is of vital importance and ACT! 2007 strengthens that security with new password settings. Now you can utilize password



Now in setup you can set Outlook as your default for viewing, composing, or sending emails while in ACT!.

rules such as password expiration options, complexity of a password, and password re-use to help protect your valuable information from unauthorized users.

ACT! Premium For Workgroups 2007

If you are an ACT! by Sage Premium for Workgroups user, you'll enjoy all of the features detailed in the first part of this article, plus several more when you upgrade to the 2007 release.

Field Security

Do you ever wish you had finer control over which users can change certain fields? ACT! 2007 adds field security by user. Now you can indicate which users have Full access, Read-Only access,

and No Access (Hidden) for certain fields within your database. In addition, Notes, History, Opportunities, Secondary Contacts, and Documents now inherit the Contact Access security of the Contact Record. For example, if the Contact has Limited Access, then all the associated Opportunities will have the same Limited Access. If a user does not have rights to see the contact, they cannot see the opportunities in Opportunity List view or on the Company record.

Calendar Synchronization

Trying to maintain two calendars is cumbersome and often spells trouble. Missed meetings, double bookings, and more can result. ACT! Premium for Workgroups 2007 adds automatic Outlook calendar synchronization ensuring both your Outlook and ACT! calendars remain in sync. Now you and your team will always have the most current, most reliable details concerning important meetings and availability of colleagues. You can automate when the Outlook calendar synchronization occurs. Requires Microsoft Outlook 2000, 2002, or 2003.

Automatic Maintenance

With ACT! Premium for Workgroups 2007, you can set and manage database maintenance times, automating database maintenance even when the database is not open.

Add Flexibility

It may make sense to offer ACT! Premium for Web to your remote or traveling team members. You can combine ACT! Premium for Workgroups and ACT! Premium for Web in a mixed-use environment. You choose the best solution for each user, and each will enjoy the benefits of a centralized customer database.

How To Get It

ACT! 2007 and ACT! Premium for Workgroups 2007 are available now. If you're ready to take advantage of the powerful new features in ACT! 2007, give us a call for upgrade details. ☆