

Introduced with ACT! 2008/Version 10

- **Dashboard** - The all-new ACT! Dashboard gives you a customizable visual overview of key performance activities for your business, like daily schedules, top opportunities and sales figures, all in one location.
- **Associate multiple contacts/users with an opportunity** – Helps you track and report on everyone involved with a single opportunity.
- **Customizable Opportunity Fields** - If you choose the Premium version of ACT! you can define the Opportunity fields as Date-type fields allowing you to track important dates specific to an opportunity.
- **Editing in List View** - You can enter and edit data in the Contact List, Group List, or Company List views without having to open each record.
- **Group and Company Security** –ACT! provides better data security for companies by assigning public, private, or limited access to company records. ACT! Premium extends this security to group records.
- **Advanced Queries for Groups and Companies** - You can create Advanced Queries for Companies and Groups that allow you to do lookups based on company or group field data.
- **Easier lookups for subgroups and divisions** - Now you see a tree-view display in the Group/Company selection dialogs, making lookups of subgroups (or divisions) a lot faster.
- **Ability to Create Duplicate Group or Company Names** - Now you can have a "Sales" group under ABC Company and a "Sales" group under XYZ Company.
- **Duplicate Checking** – Automatically check for duplicate Groups and Companies when creating a new record.
- **Attach shortcut** - Add document shortcuts to activity, history, notes, and the documents tab without having to attach the full document. You can also allow non-users to edit the same document, ensuring you have the most current version in your database.
- **Synchronization subscription list permissions.** Restrict remote users from requesting contacts via a subscription list. This reduces problems when requests fall outside the criteria of the defined Sync Set.

Introduced with ACT! 2007/Version 9

- **Direct Link to Microsoft Outlook® e-mail.** No more ACT Email Window interface. (Create ACT! history from within Outlook, attach an Outlook message to ACT! contacts, and create an ACT! contact record from an Outlook email).
- **Outlook calendar automatic synchronization.** Automate when Outlook calendar synchronization occurs, even when the database is not open.
- **Database maintenance automation.** With ACT! Premium you can use the ACT! scheduler to create a task for automatic database maintenance, even when the database is not open.
- **Field level security.** In the ACT! Premium application an administrator or manager can specify access to individual fields. The fields can be set to full access or read only full access, read only, or no access.

- **History and Notes preview pane.** Preview the content of a history or note in the preview pane on the history or notes tabs. You cannot edit in the preview pane, but you can copy text from it.
- **Last E-mail field.** Quickly identify the last e-mail send date for a given contact using the last e-mail field. The field updates anytime an e-mail history is created, even when integrating with Lotus Notes, Outlook Express, or Outlook.
- **Linked company fields.** Using ACT! Premium you can link additional contact fields to company fields or remove existing links. A linked field affects all companies in your database. When you update linked fields in a company record, contacts in the company inherit the change.
- **Password policy.** In ACT! Premium administrators can define a password policy for users that controls the length, complexity and reuse of their passwords.
- **Secure History, Notes, and Opportunities all-at-once.** From the contact record change security access of history, notes, and opportunities at once. This lets you select multiple history, notes, and opportunities and quickly make them public or private.
- **Speed...** Really, it is so much faster, you can't believe it. Testing shows over 60% faster than 7.0. Calendar views now open faster than version 6.0

Introduced with ACT! 2006/Version 8

1. **Enhanced Feature Sets**
 - Tree View for Groups and Companies.
 - View all Group and Company Associations - You can now view the contacts membership in Groups or Companies on the Groups tab, whether they were manually added or dynamically added using a query.
 - Add or Remove Groups/Companies from the Contact's record - Add **or remove** one or many contacts with ease.
 - Change the Activity Organizer - Easily update or change who an activity is scheduled for, even after the activity has been scheduled.
2. **Increased Compatibility**
 - Lotus Notes Support - Attach inbound emails to contacts, create new contacts and activities from e-mail sender, create contact histories on the contact record when sending emails, while still using Lotus Notes.
 - Citrix/Terminal Services Support - Multiple users from different offices can access the same ACT! database, without the need for VPN access.
 - Accounting link to QuickBooks, Business Works and Simply Accounting.
3. **Improved Data Security**
 - Field-level security by user.
 - Database expiration has now been extended from 90 to 365 days with one last chance to do a one-way sync even after the remote database has expired.
 - Custom user permissions allow the administrator the ability to provide some administrative functions to remote users to back-up, restore, and perform database maintenance. They can also restrict user's ability to delete contacts or export to Excel.
 - Only attachments related to the sync set will sync.

Introduced with ACT! 2005/Version 7

Focus on six major feature areas of differences from previous versions (ACT 2004/6 and earlier)

1. **Groups**
 - o Easy creation and maintenance - save lookups as groups; groups can be based upon a query or static membership. Because queries can be based on fields, you may never have to manually update (add or remove) groups again.
 - o Increased levels - 15 levels of subgroups.
2. **Companies**
 - o Similar to groups - same properties; easily convert a group to a company.
 - o Company record - updates to certain company fields can be pushed to contacts; automatic association.
 - o Easy creation - create a company from a contact; create a contact from a company.
3. **Opportunities**
 - o Complete view - opportunity list view; opportunity lookups.
 - o Consistent entry of data - product list; multiple sales processes.
 - o Track more information - multiple products and user fields; automatic histories as opportunities move thru stages.
 - o Easier reporting - export to Excel; create quotes; more report templates.
4. **Calendars and Scheduling**
 - o Fully customizable - custom activity and priority types; database events.
 - o Activity security - calendar delegates so only authorized users can schedule on your behalf.
 - o Direct Link to Microsoft Outlook e-mail.
 - o Automatic synchronization of Outlook calendars with the Premium version.
5. **Synchronization**
 - o Easy to set up - reusable queries to establish what contacts sync to what users; user interface "walks you thru".
 - o Reliable - recover from broken syncs; schedule your syncs.
 - o Consistent - security is enforced; true parent to child relationship.
6. **Security**
 - o Record Level Security by users or teams for Premium versions
 - o Field Level Security - by field for basic ACT! and by field by user in ACT! Premium
 - o Password Management - ability to create rules for password length, complexity, re-use, etc.