



Pims Business Systems Ltd  
13, Seapoint  
Riverstown Business Park  
Tramore  
Co. Waterford

Make contact.  
Build relationships.  
Get results.

See the whole picture with ACT! Link software, which offers your business an integrated front and back office system developed and supported by Sage. ACT! Link software is available to integrate ACT! with Sage Accounting Software, such as Sage Instant Accounts, Sage Line 50 or Sage 200.

Sage also provides award winning software support services and training courses that can help you with the smooth operation of your ACT! system, leaving you time to focus on your customers and your business.

## ACT! by Sage – Powerful contact and customer management for your business

Whether you're a small business with a single salesperson or a large organisation with customer-facing teams across the country, you need ACT! by Sage. ACT! is an easy to deploy contact and CRM (customer relationship management) solution that's equally easy to learn and provides flexible deployment options to suit all types of users.

### Key Features Include:

- Maintain a complete customer view with instant access to centralised contact and customer information and robust reporting capabilities
- Work to improve your bottom line by forecasting and tracking customer opportunities
- Manage and prioritise activities
- Track all contact-related communications
- ACT! can be tailored by each user and offers robust integration with the office tools used everyday, such as Microsoft® Office, Lotus Notes®, Sage accounting products and handheld devices

### ACT!

ACT! is ideal for individuals and small businesses of up to 10 users sharing data over a network. With ACT!, you can manage and nurture your customer information so that you can grow productive business relationships.

### ACT! Premium for Workgroups

ACT! Premium for Workgroups provides all of the features of ACT!, plus advanced workgroup functionality in the areas of administration, security and opportunity tracking for up to 50 users sharing data. It is of particular benefit to corporate workgroups and large sales teams selling to companies and individuals and has the ability to handle large volumes of information. ACT! Premium for Workgroups can be tailored to specific business requirements, provides in-depth business analysis, integrates with popular business management tools and provides a low total cost of ownership.

### ACT! Premium for Web

ACT! Premium for Web provides users with anytime, anywhere access to centralised customer information over the Web – removing the requirement for remote or travelling users to synchronise data. Simple server installation allows for easy roll-out to users and provides organisations with the security of knowing that critical customer data stays within their firewalls.

Also available in the Sage range of CRM solutions is Sage CRM and Sage SalesLogix – meeting your needs whatever your business size, processes, geographical location and deployment configuration.



13 Seapoint  
Riverstown Business Park  
Tramore  
Co Waterford  
051 395900  
sales@pims.ie

# Key Features of ACT! CRM Solutions

Feature	Description	ACT!	ACT! Premium	ACT! Premium for Web
Multi-user Capabilities	Allows from 1 to 50 or more users.	1 – 10 users	5 – 50+ users	5 – 50+ users
Contact Management	Track complete information about your business contacts, including phone numbers, addresses, documents, sales opportunities, e-mails and more.	✓	✓	✓
Customisable Screen	60+ pre-defined fields to store all the data you need regarding your contacts. The 'Layout Designer' allows you to add fields and customise your screen with drop-down lists, images, web links, tickboxes and more.	✓	✓	✓
Notes/History Management	Enter virtually unlimited date and time stamped notes and history items and attach documents to activity and history items.	✓	✓	✓
Calendar Management	Schedule calls, meetings and to-do's and track activities and appointments using the built in calendar with pop-up reminders.	✓	✓	✓
Company Management	Create company records, which will organise your contacts more efficiently and update company linked fields from a contact, which reduces repetition of data entry.	✓	✓	✓
Group Management	15 hierarchies of groups and subgroups, with dynamic membership to automatically add new contacts to groups.	✓	✓	✓
Searches and Lookups	Quick search, query builder and advanced keyword search gives you an unrivalled ability to interrogate your data.	✓	✓	✓
Microsoft Excel Integration	Export any list view instantly to Microsoft Excel with just one mouse click.	✓	✓	✓
Mail Merge	Mail Merge to multiple contacts, groups or companies using e-mail, fax, ACT! Word Processor or Microsoft Word and automatically record histories.	✓	✓	✓
Microsoft Outlook Integration	Use ACT! specific options, directly from Microsoft Outlook to send e-mails, attach e-mails, create contacts and use ACT! e-mail addresses, all within Microsoft Outlook.	✓	✓	
Sales Pipeline Management	Opportunity management allows you to store, view and sort all your sales leads, and customisable opportunity fields and drop-downs enable you to store all the information you need regarding your sales leads.	✓	✓	✓
Product Lists	Generate or import product lists to store stock codes and prices and track multiple products on each sales opportunity.	✓	✓	✓
Sales Forecasting	Forecasting tools enable the sales rep or sales manager to estimate their sales value over the coming period.	✓	✓	✓
Instant Quotations	Generate instant quotes, which display all of the stock, pricing, address and billing information automatically, as well as attaching automatically to the contact record.	✓	✓	
Sales Reporting	Sales reports tell you what you need to know about the sales reps and teams and the pipeline report gives a graphical view of your pipeline.	✓	✓	✓
Standard and Customisable Reports	40+ standard reports & powerful 'Report Designer' for creating or editing your own reports.	✓	✓	✓
Security	5 security levels for users and password expiration and complexity options.		✓	✓
Field Level Security	Field level security (secures individual fields by user or team).		✓	✓
Administration	Automatic database synchronisation, backup, Microsoft Outlook calendar synchronisation and maintenance.		✓	✓
Remote Access	Access your data when out of the office via Citrix®/Terminal Services.	✓	✓	✓
Remote Synchronisation	Work offline and synchronise via local network, Internet* or VPN* (*Premium only).	✓	✓	
Web Access	Access your data through a web browser, on your local network or over the Internet.			✓
Integrates with Sage Accounting Software	Integration with Sage Instant Accounts, Sage Line 50 and Sage 200.	✓	✓	
Synchronise with PDA	Synchronise with Pocket PC or Palm® OS.	✓	✓	



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