



Stewart Technologies, Inc.

ACT! 2010 Feature Chart

6.0 2005 2006 2007 2008 2009 2010

Contact and Customer Management							
Separate notes and history tabs		✓	✓	✓	✓	✓	✓
Notes and history shared between contacts		✓	✓	✓	✓	✓	✓
Unlimited secondary contacts		✓	✓	✓	✓	✓	✓
Rich text formatting including colors, bullets, graphics, and URLs		✓	✓	✓	✓	✓	✓
Attach documents to activities and history		✓	✓	✓	✓	✓	✓
Synchronize attachments		✓	✓	✓	✓	✓	✓
Groups with 15 levels of hierarchy (14 subgroups)		✓	✓	✓	✓	✓	✓
Dynamic group membership		✓	✓	✓	✓	✓	✓
Company records		✓	✓	✓	✓	✓	✓
Contacts linked to companies		✓	✓	✓	✓	✓	✓
Tree view for companies			✓	✓	✓	✓	✓
Split panel notes and history preview				✓	✓	✓	✓
Hyperlink to companies from contact list view			✓	✓	✓	✓	✓
Specify linked contact/company fields				✓	✓	✓	✓
Print any ACT! calendar template with the contact phone number	✓		✓	✓	✓	✓	✓
View all group associations	✓		✓	✓	✓	✓	✓
Duplicate checking for groups and companies					✓	✓	✓
Advanced queries for groups and companies	✓				✓	✓	✓
List edit mode <sup>1</sup>	✓				✓	✓	✓
Duplicate checking by first and last name	✓				✓	✓	✓
Related contacts						✓	✓
Streamlined, easier to learn and use layouts with new colors							✓
Related tasks							✓
Consolidated menus							✓
Big "easy" buttons							✓
Welcome page							✓
Social media integration							✓
Lookups and Searching							
Lookup indicator <sup>1</sup>	✓			✓	✓	✓	✓
Edit existing queries <sup>1</sup>	✓			✓	✓	✓	✓
Advanced keyword search	✓			✓	✓	✓	✓
Save lookups as groups		✓	✓	✓	✓	✓	✓
Streamlined lookup functionality						✓	✓
Instant access to search							✓

Note: Shaded cells indicate an upgrade to ACT! Premium or ACT! Corporate Edition is required.

For questions, please contact Beth L. Brigham at extension 102 or email [act@stewarttechnologies.com](mailto:act@stewarttechnologies.com)



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Calendar and Activity Management							
Rich text formatting in activity details		✓	✓	✓	✓	✓	✓
Five calendar views, including daily, weekly, and monthly		✓	✓	✓	✓	✓	✓
View global events		✓	✓	✓	✓	✓	✓
Change activity organizer	✓		✓	✓	✓	✓	✓
ACT! activity scheduling from Microsoft® Outlook® e-mails						✓	✓
Improved printing						✓	✓
Support for iCalendar							✓
Marketing Communications							
Built-in spell checker		✓	✓	✓	✓	✓	✓
Improved mail merge		✓	✓	✓	✓	✓	✓
Validate and correct addresses during mail merge		✓	✓	✓	✓	✓	✓
ACT! e-mail find		✓	✓	✓	✓	✓	✓
Last e-mail field				✓	✓	✓	✓
En masse e-mail attaching						✓	✓
E-mail send from the notes preview pane						✓	✓
E-mail marketing, survey and Web forms; marketing results tab; and drip marketing (requires additional subscription)							✓
Mail merge in ACT! by Sage Premium for Web with Word							✓
Sales Opportunity Management							
Opportunity list view		✓	✓	✓	✓	✓	✓
Opportunity lookups		✓	✓	✓	✓	✓	✓
Instant quotes <sup>2</sup>		✓	✓	✓	✓	✓	✓
Multiple built-in ACT! sales processes		✓	✓	✓	✓	✓	✓
Track multiple products		✓	✓	✓	✓	✓	✓
Generate and import product list		✓	✓	✓	✓	✓	✓
Opportunity date fields				✓	✓	✓	✓
Customizable opportunities							✓
New ACT! sales processes							✓
Instant quotes <sup>2</sup> in ACT! Premium for Web with Word							✓
Dashboards and Reporting							
20+ preformatted/streamlined sales reports		✓	✓	✓	✓	✓	✓
Graphical sales pipeline with drill down to see opportunity details		✓	✓	✓	✓	✓	✓
ACT! dashboard					✓	✓	✓
ACT! Premium dashboard with team views					✓	✓	✓
Streamlined reports view							✓
New dashboards							✓
13 new reports							✓
New OLEDB provider							✓

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<b>Data Sharing and Security</b>							
Group scheduling		✓	✓	✓	✓	✓	✓
Manage resources including conference rooms and equipment		✓	✓	✓	✓	✓	✓
Five security levels		✓	✓	✓	✓	✓	✓
Mark notes and opportunities as private		✓	✓	✓	✓	✓	✓
Secure notes, history, and opportunities en masse				✓	✓	✓	✓
Field level security				✓	✓	✓	✓
Company security					✓	✓	✓
Group and company security					✓	✓	✓
<b>Personalization<sup>9</sup></b>							
Share drop-down lists across different fields		✓	✓	✓	✓	✓	✓
Field types – picture, yes/no, memo, and e-mail		✓	✓	✓	✓	✓	✓
Customizable drop-downs		✓	✓	✓	✓	✓	✓
Utilize multi-select values		✓	✓	✓	✓	✓	✓
Customizable priority, activity, and history types		✓	✓	✓	✓	✓	✓
Customizable opportunity field names and types with drop-down lists			✓	✓	✓	✓	✓
<b>Anywhere Access</b>							
ACT! Premium for Web			✓	✓	✓	✓	✓
Citrix <sup>®</sup> or terminal services support			✓	✓	✓	✓	✓
BlackBerry <sup>®</sup>			✓	✓	✓	✓	✓
iPhone <sup>™</sup>							✓
<b>Integration</b>							
Export to Excel <sup>®</sup>		✓	✓	✓	✓	✓	✓
Peachtree by Sage <sup>1</sup>	✓		✓	✓	✓	✓	✓
Simply Accounting by Sage, Sage MAS 90 and Sage MAS 200, and Sage BusinessWorks <sup>1</sup>			✓	✓	✓	✓	✓
Use ACT! as Outlook address book		✓	✓	✓	✓	✓	✓
ACT! e-mail client integrated with Outlook, Outlook Express, or Lotus Notes <sup>®</sup>	✓		✓	✓	✓	✓	✓
Create ACT! contacts from Outlook e-mail <sup>1</sup>				✓	✓	✓	✓
Attach Outlook e-mail to ACT! contacts				✓	✓	✓	✓
Specify default history types and create ACT! history from Outlook				✓	✓	✓	✓
Flexible Outlook rules and ACT!						✓	✓
Support for vCard							✓

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Administration <sup>1</sup>	6.0	2005	2006	2007	2008	2009	2010
Scalability to accommodate teams of 10+		✓	✓	✓	✓	✓	✓
Query-based sync		✓	✓	✓	✓	✓	✓
View team memberships			✓	✓	✓	✓	✓
Grant contact access en masse			✓	✓	✓	✓	✓
Lookup contacts by access			✓	✓	✓	✓	✓
Custom user permissions			✓	✓	✓	✓	✓
Automatic database sync and backup			✓	✓	✓	✓	✓
Improved administration for remote users			✓	✓	✓	✓	✓
Support for non-local machine administrators			✓	✓	✓	✓	✓
Silent install <sup>2</sup>			✓	✓	✓	✓	✓
Automatic database maintenance				✓	✓	✓	✓
Password rules				✓	✓	✓	✓
ACT! scheduler in ACT!						✓	✓
ACT! scheduler with hourly options						✓	✓
Simplified installation of a remote database						✓	✓
Streamlined sync progress bar						✓	✓
Option to exclude attachments from backups						✓	✓
Quick info for logged-in users						✓	✓
Create remote databases simultaneously							✓
Specify currency at the time of database creation							✓

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