

ACT! Premium by Sage for Real Estate



ACT! by Sage Premium for Real Estate 2006

#1 Selling Contact and Customer Manager

With more than 2.5 million individual users and 32,000 corporate customers, ACT! continues to be the award-winning market leader in contact and customer management across all market segments, with a particularly high adoption rate in real estate. To further meet the unique needs of the real estate industry, ACT! Premium for Real Estate was designed for agents and brokers in the residential real estate market. ACT! Premium for Real Estate builds on the ACT! reputation for being the preferred choice of selling professionals, while equipping real estate professionals with industry-specific tools to help sell more homes and cultivate good referrals in today's competitive real estate market. With its ease-of-use and intuitive interface, ACT! Premium for Real Estate helps real estate professionals quickly become more productive and effective in managing prospects and customers.



Make contact.
Build relationships.
Get results.

ACT! by Sage Premium for Real Estate 2006 enables real estate professionals to instantly access complete contact and customer information, manage and prioritize activities, and track all contact-related communications to help sell more homes and cultivate good referrals in today's competitive real estate market. With its ease-of-use and intuitive interface, ACT! Premium for Real Estate helps real estate professionals quickly become more productive and effective in managing prospects and customers.

Key Capabilities

- Centralize critical buyer, seller, and vendor information
- Instantly access information for increased customer service
- Grow relationships through prospecting and marketing communications
- Prioritize work to stay on top of appointments and tasks
- Manage leads from initial inquiry through close
- Report on activities for a view of customer interactions
- Link to your Palm OS or Pocket PC handheld devices

Centralize Buyer and Seller Information

ACT! Premium for Real Estate is a single, central repository for critical prospect and customer information captured across your business—whether you are a single-agent/broker business or a 50-agent workgroup.¹ ACT! enables you to instantly access key contact information, manage and prioritize activities, and easily view a complete history of communications and activities with a customer. You can even access information on-the-go by syncing your ACT! data to your Palm OS® or Pocket PC device via the included handheld links.

Stay In Touch with Ease

Track all of your contact and customer communications on the contact record for easy reference. ACT! Premium for Real Estate offers 30 letter templates customized for real estate, including Letters to Buyers, FSBOs, Lead Follow-up, Open House Follow-up, Referral Letters, and more. A respected real estate communications expert developed these custom letter templates to improve your communications. ACT! Mail Merge also allows you to correspond with multiple contacts and automatically track a history on each contact record.

Prioritize Time to Increase Productivity

Schedule activities using one of more than 20 real estate activities for better tracking and analysis of time spent. Or, set up an Activities Series using one of the nine custom Activity Series specific to real estate including Active Listing, New Listing, Listing Prospect, Active Buyer, New Buyer, Buyer Prospect, Open House, Expired Listings, and FSBO Listings. In addition, ACT! offers multiple Calendar Views as well as Activity Alarms, so you never miss an important appointment or deliverable.

sage
software

Your business in mind.

¹ Actual number of users and contacts supported will vary based on hardware and size and usage of your database. The 50-user limit is based on performance tests using minimum hardware requirements and is a recommendation. You must purchase one license of ACT! per user.



Real Estate Features:

- Facilitate daily communications with 30 letter templates customized for real estate.
- Track and analyze how you spend your time using more than 20 custom real estate activity types.
- Automate your processes using nine custom Activity Series for real estate.
- Choose from six custom report templates to track and measure real estate activities.
- Quickly access your MLS² homepage from a link within ACT! Premium for Real Estate.
- Use a custom layout designed for residential real estate agents.

² Use of this feature requires an Internet connection, Internet Explorer 5.5 or 6.0, and an online MLS account

Manage Leads to Improve Sales

ACT! Premium for Real Estate enables you to import leads from a variety of sources so you can immediately start turning those prospects into customers. Segment leads into relevant Groups, schedule an Activity Series for all leads that you have imported so you have a set marketing strategy with reminders of upcoming tasks, and send personalized communication using mail merge.

With ACT! Premium for Real Estate, you can track sales opportunities through close using the standard sales process or a process customized to suit your business. View all sales opportunities at once or filter by Estimated Close, Date, Status, Sales Stage, Amount, or Probability of Close so you always know where each listing stands. Plus, choose from more than 20 pre-formatted Sales Reports or create your own.

Get Up and Running Quickly

ACT! Premium for Real Estate is easy to install. With a Start Here Guide, a step-by-step Installation Wizard, a Getting Started Wizard to help you configure common preferences and settings, and a Product Features Tour, you can get up and running quickly. Using a personal information manager or PDA software to manage contacts? Data can be imported from popular formats including .csv, Outlook®, and Palm® Desktop, eliminating the work involved in re-entering data.

From the main Contact View, view the Seller Property tab for details about your customer's property for sale.

Time	Date	Time	Duration	Priority	Reschedule Details
Call	2/23/2006	10:00 AM	15 minutes	High	New Listing - Schedule meeting for market analysis
Present Market Analysis	2/23/2006	10:00 AM	1 hour	High	New Listing - Meet and present
Contact Activities	2/23/2006	10:00 AM	1 hour	High	New Listing - Answer questions about market analysis and pricing
MLS Activities	2/23/2006	10:00 AM	15 minutes	High	New Listing - Add listing to MLS
Property Facts	2/23/2006	10:00 AM	30 minutes	Medium	New Listing - Create Plans
Listing Activities	2/23/2006	10:00 AM	30 minutes	High	New Listing - Setup lockbox
Signature Activities	2/23/2006	10:00 AM	30 minutes	High	New Listing - Order / place for Sale sign(s)
Marketing Activities	2/23/2006	10:00 AM	1 hour	High	New Listing - Place initial advertisements
Property Facts	2/23/2006	10:00 AM	1 hour	Medium	New Listing - Provide Facts to caller

Use six custom report templates for real estate, including Seller Completed Activities, to track and measure real estate activities.

KEY CAPABILITIES

Centralize critical buyer, seller, and vendor information

- Track complete buyer, seller, and vendor information including contact details, notes and history, appointments and to-dos, documents, and sales opportunities.
- Enter virtually unlimited date- and time-stamped notes and history.
- Use the Groups feature to easily communicate and schedule with related contacts.
- Attach critical documents such as inspection reports, house photos, MLS listings, etc. to the contact record.
- Use the Contact Type field to signify if a contact is a prospect, buyer, seller, home inspector, mortgage broker, title agent, or competitor.
- Use the Referred By field to capture your lead sources such as referral, sign, open house, newsletter, marketing campaign, or Web lead.
- Use a custom layout designed for real estate agents or customize to suit your business by designating additional fields.

Instantly access key information

- Perform a quick lookup on most fields or use Keyword Search to locate a contact record.
- Perform numeric lookups such as greater than or less than queries.
- View complete contact information so you answer questions quickly and effectively, providing excellent customer service.
- Reference the Last Results field to see your current status with that contact.
- Launch your MLS³ homepage from within ACT! Premium for Real Estate for easy access to searches performed, listings sent to the contact, etc.

Manage and grow business relationships

- Select a contact or group of contacts and perform a mail merge to a letter or e-mail. A history is automatically generated on each contact record.
- Facilitate your daily contact communications using 30 letter templates customized for real estate.
- Write letters from within ACT! using Microsoft® Word or the built-in ACT! Word Processor which supports tables, graphics, HTML, and spell checking.
- Create, send, and track e-mail to/from contacts using the ACT! E-mail client or through Outlook®, Outlook Express, or Lotus Notes® e-mail.⁴
- Use Rich Text Formatting, spell check, signatures, and add multiple attachments such as MLS listings when e-mailing customers and prospects.

Prioritize your work

- Schedule calls, meetings, and to-dos quickly and easily.
- Schedule one of more than 20 activities customized for real estate for better tracking and analysis of time spent.
- Access Daily, Weekly, and Monthly calendar views for a snapshot of all appointments.
- Filter activities by priority, date range, or user, even displaying totals for each type of activity.
- Use Activity Alarms to stay on top of closing/listing activities, marketing tasks, appointments, etc. Incomplete activities roll over to the next day.
- Automate your processes using nine custom Activity Series for real estate. Activity Series allow you to schedule multiple activities at once for a project. Activities are linked so if a date changes in one, it pushes dates out for other activities.

Manage leads from initial inquiry through close

- Easily import leads from text and .csv files into ACT! Premium for Real Estate.
- Enter as much or as little contact information as you need to get started with a contact.
- Group contacts based on list source, target area, buyer/seller status, and more. Easily send a Group individually personalized communications using mail merge.
- Use the built-in Sales Process to track leads or customize to suit your specific needs.
- View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.

Report on activities and sales

- Access 40 standard reports including Phone Lists, Activity Reports, Referral Source, and Sales Summaries.
- Use six custom report templates to track and measure real estate activities.

Take critical information on the go

- Synchronize your ACT! Calendar, Contact and To-Do information, Notes, and History items to Palm OS or Pocket PC devices.
- Print to more than 20 popular paper organizers so you always have your schedule with you.

³ Use of this feature requires an Internet connection, Internet Explore 5.5 or 6.0, and an online MLS account.

⁴ Requires Microsoft Outlook 2000, 2002, or 2003. Requires Lotus Notes 6.5. Requires Outlook Express 5.5 or 5.6

ACT! Premium by Sage for Real Estate

For more information
about ACT! Premium
for Real Estate:

- Call 888-ACT-2006
- 5 users or more?
Call 888-855-5222
for Corporate Licensing
- Contact your ACT!
Certified Consultant
- Visit www.act.com

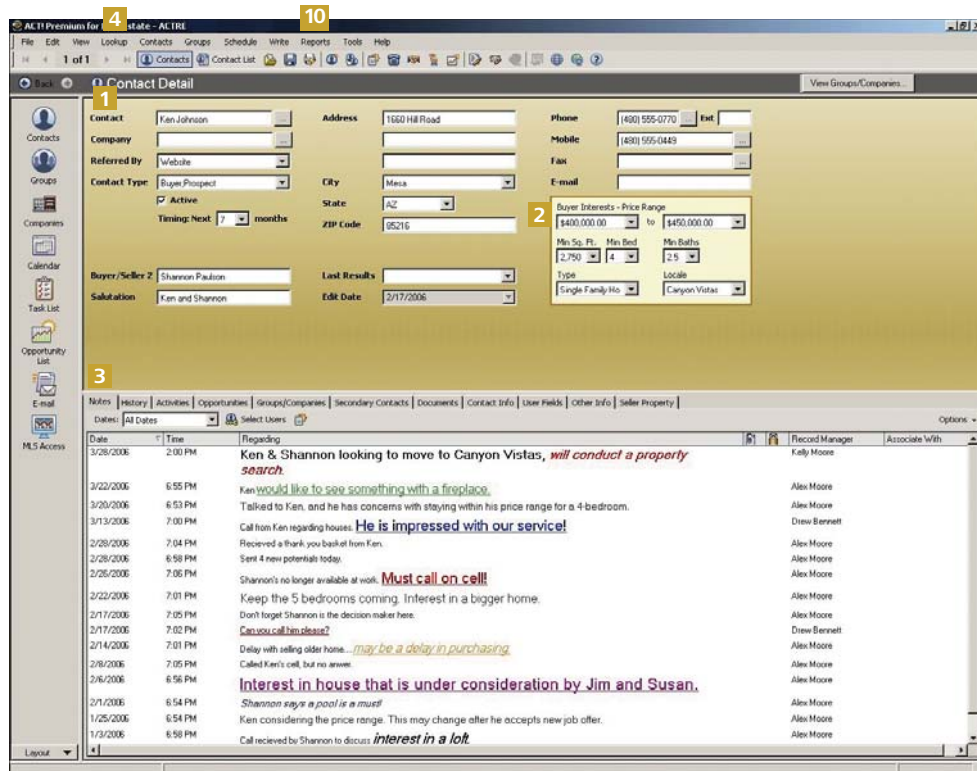
Important Note for all customers:

Compatibility with ACT! Products: ACT! Premium for Real Estate 2006 is not supported for use with ACT! 2006, ACT! Premium for Workgroups 2006, or any prior version of ACT!. However, ACT! data (v2006 or prior) can be converted to an ACT! Premium for Real Estate 2006 database. When using ACT! Premium for Real Estate 2006 in conjunction with ACT! Premium for Web 2006, ACT! Premium for Web 2006 users will not have access to real estate specific features.

Regarding ACT! Add-on Products: Certain ACT! add-on products may not be compatible with ACT! Premium for Real Estate 2006. Please visit www.actsolutions.com or check with your add-on product provider to determine compatibility.

sage
software
Your business in mind.

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- Contact Detail:** Capture key contact details including Phone, E-mail, Referred By, Contact Type, and Timing.
- Buyer Interests:** Easily enter buyer interests such as price range, square footage, number of bathrooms, residence type, and location on the main contact record.
- Notes and History:** View virtually unlimited date- and time-stamped Notes and History. Even use Rich Text formatting with different colors and fonts for clarity.
- Lookups:** Instantly access any important customer or detail with robust look-up capabilities.
- Groups:** Track collections of related contacts using the Groups feature for an at-a-glance view, including groups used to track properties and contacts associated with those properties.
- Calendar:** Get daily, weekly, and monthly views with pop-up details on each event as you mouse over them. Schedule one of more than 20 activities customized for real estate for better tracking and analysis of time spent.
- Task List:** Sort by priority to stay on top of important tasks and use Activity Alarms for closing/listing activities, marketing tasks, appointments, etc.
- Opportunity List:** View all sales opportunities at once or filter by Users, Estimated Close Date, Status, Sales Stage, Amount, or Probability of Close.
- E-mail:** Communicate to your customers by e-mail and track a history on each contact record.
- Reports:** Track and measure real estate specific activities with six custom reports for real estate, plus up to 40 standard reports.

About ACT!

ACT! is the #1 selling contact and customer manager that enables individuals and organizations involved in selling or other contact-related functions to Make contact, Build relationships, and Get results. ACT! has an 18-year track record for delivering products that are easy to use, customizable, and affordable for small businesses. ACT! helps you instantly access key contact and customer details, manage and prioritize activities, and track all contact-related communications so you can build productive business relationships.

About Sage Software

Sage Software offers leading business management software and services that support the needs, challenges and dreams of more than 2.5 million small and mid-sized business customers in North America. Its parent company, The Sage Group plc (London: SGE.L), supports 4.7 million customers worldwide. For more than 25 years, Sage Software has delivered easy-to-use, scalable and customizable software for accounting, customer relationship management, human resources, time tracking and the specialized needs of accounting practices and the construction, distribution, manufacturing, nonprofit and real estate industries. For more information, please visit the Web site at www.sagesoftware.com/moreinfo or call (866) 308-2378.