

ACT! for Palm OS®



ACT! for Palm OS® 3.0

Stay Productive Wherever You Are

ACT! for Palm OS 3.0 provides you with access to critical ACT! information from a Palm OS handheld device so you can stay productive, whether you're in the office or on-the-go. Access and update pre-defined fields as well as custom fields, notes and history, activities and calendar information, sales opportunities, and more. Now you can bring the power and convenience of ACT! to your handheld device.

Experience True Contact Management from your Handheld

Because ACT! for Palm OS is a robust ACT! application native to the handheld device, it delivers many of the benefits of contact and customer management such as a linked calendar and task list, the ability to go directly to a contact record from a scheduled appointment, and the ability to view interactions with a contact or a customer from the contact record. In contrast, ACT! Link for Palm OS¹ and third-party synchronization solutions must use the Date Book and Address Book that come with Palm OS devices and do not provide the seamless experience of ACT! for Palm OS.

Anytime, Anywhere Access to Critical Customer Information

Whether you are accessing customer information, entering opportunities, or tracking time spent, you can do it all from your handheld device, anytime, anywhere. With ACT! for Palm OS, you can synchronize more pre-defined fields as well as more ACT! custom fields than with our ACT! Link for Palm OS product, giving you access to more complete customer information when on-the-go¹.

ACT! for Palm OS also enables you to view Group and Company membership for each contact – whether the contact was manually added to the Group or Company or dynamically added based on defined criteria². At a customer site and need to enter a new opportunity? Not a problem. ACT! for Palm OS also supports the Opportunity List view for viewing and filtering current opportunities, and gives you the ability to select products from the existing opportunity product list and add multiple products to an opportunity³. That saves you time when you return to the office. And, scheduling activities and tracking time is easy with ACT! for Palm OS. In addition to calls, meetings, and to-dos, you can schedule activities from your device using the Custom Activity Types you have defined in ACT!⁴, so you can stay on top of your deliverables when out of the office.

Quickly Enter and Access Information

ACT! for Palm OS has been designed to make entering and accessing information on your handheld device easier than ever. First, when adding a note or history to a contact record, you can attach it to multiple contacts without having to enter the same data multiple times.⁵ And, with the Custom Field view, you can design a snapshot of the 10 most critical data fields that you regularly access. This read-only view is based on data captured in other areas of the application, but allows you to access and view key information quickly and productively. And, because application graphics as well as activities and calendars appear in color, you can view activities by priority so you never miss a key deliverable.

BRING THE POWER AND CONVENIENCE OF ACT! TO YOUR HANDHELD

ACT! for Palm OS 3.0 is an add-on product for use with ACT! by Sage 2008 (10.0) and ACT! by Sage Premium 2008 (10.0). It brings all the power and convenience of ACT! to your handheld device. With more than 2.7 million users and 41,000 corporate customers, ACT! continues to be the market leader in contact and customer management and ACT! for Palm OS is a great complement for mobile access.

KEY BENEFITS

Experience true contact management from your handheld

Synchronize more data to your handheld

View Group and Company information

Use Opportunity features to manage your sales

Create a custom layout for quick data access

View information in color for easy prioritization

Track time spent on business activities

Enter data on your handheld to save time

For more information about ACT! for Palm OS:

- Call 1-877-501-4496
- Contact your ACT! Certified Consultant
- Visit www.act.com



◀ Manage your contacts and tasks from your handheld device

Upgrading from a Prior Version?

ACT! for Palm OS 3.0 supports several new features introduced in ACT! 2008 solutions, including:

- Group and Company security⁶: Supports limited access in ACT! Premium to any Group or Company record by user or by teams of users
- Consistent labels within Groups and Companies: Displays Group and Company description views so users can tell the difference between Groups or Companies entered in ACT! with the same name
- Multiple Contacts per Opportunity: Users can associate multiple contacts to a single opportunity to ensure they are aware of every contact within an organization that could impact the closing of a deal

Of course, ACT! for Palm OS 3.0 still delivers all the great features of your existing Palm OS product.

Important Note for ACT! for Palm OS[®] customers: ACT! for Palm OS 2.0 is compatible with ACT! 8.0 and 9.0, ACT! Premium for Workgroups 8.0 and 9.0, ACT! Premium for Real Estate 2006, ACT! for Financial Professionals 2007, and ACT! Premium for Financial Professionals 2007. ACT! for Palm OS 3.0 is compatible with ACT! 2008, ACT! Premium 2008, ACT! for Real Estate 2008, and ACT! Premium for Real Estate 2008. ACT! 2008 and ACT! Premium 2008 users must be on version 10.0.1 to be compatible with ACT! for Palm OS 3.0. Please refer to the Installation Guide for details.

- 1 ACT! for Palm OS and ACT! Link for Palm OS cannot be used simultaneously on the same machine.
- 2 Companies and Groups may not be added, updated, or deleted on the device. Group or Company membership may be updated on the device. A Group or Company membership will not display if one or more of the fields used in the Group or Company dynamic membership rules is not included in the user's sync set.
- 3 ACT! for Palm OS users may not add, update, or delete products in the opportunity product list from the device. New products must be added in ACT!.
- 4 ACT! for Palm OS users may not add, update, or delete custom activity types from the device. Custom activity types must be added in ACT!.
- 5 ACT! for Palm OS users do not have the option to limit an update to a single contact. Any change to shared notes or history that is made on the device goes to all shared contacts.
- 6 Limited access Group and Company names will be viewable from the tree view of ACT! Premium, but all associated information will remain inaccessible.

About ACT!

The #1 selling contact and customer manager for 20 years, ACT! by Sage enables individuals and teams involved in selling or other contact-driven roles to improve productivity by helping them organize contact information, manage daily responsibilities, and communicate more effectively. With contact details at their fingertips, they can focus on what's important to their business - building stronger customer relationships. ACT! is easy to learn and use, customizable, and affordable for small businesses. With more than 2.7 million individual users and 41,000 corporate customers in 25 countries, ACT! continues to lead the industry in helping customers connect and succeed.



End-to-end solutions. Expert advice. Premium support. That's Sage 360[®].

Sage Software supports the needs, challenges, and dreams of 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable and customizable software and services. Sage Software is a subsidiary of The Sage Group plc, a leading international supplier of business management software and services formed in 1981 and listed on the London Stock Exchange since 1989.

