

# Whats New ACT! V21 2019

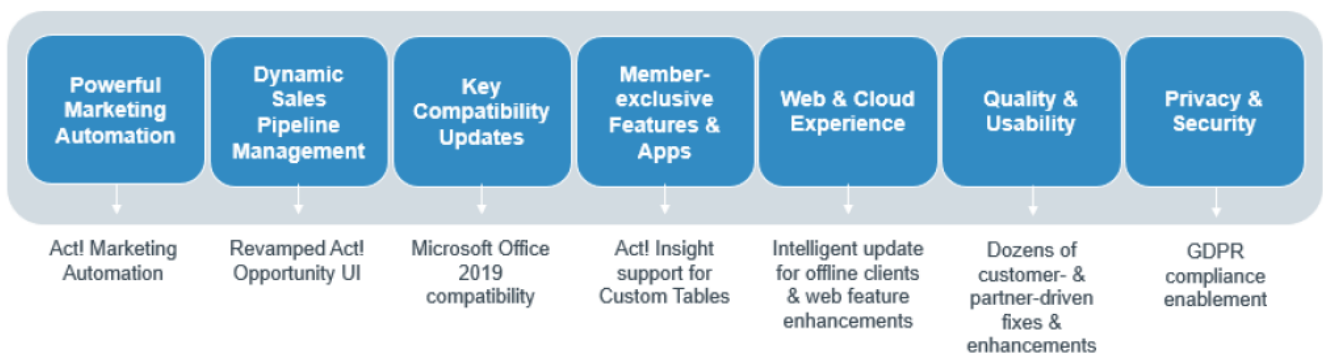
## V21 New Features – AMA (ACT Marketing Automation) - Sys Requirements

### Highlights of this release

- Installer and Technology Updates
- Act! Marketing Automation\*
- Opportunities Enhancements\*
- List view - Pipeline view
- Act! Insight – Custom Tables Support\*
- Outlook Integration
- Attach Inbound Emails automatically
- Activity Invitations – improved technology
- Web & Cloud Experience
- Manage Activity Types via Web
- Improved user experience and reduced support calls
- Custom Tables Improvements\*
- Activation wizard enhanced
- Updated Welcome screen with Quick Access and Helpful Resources
- Works with Microsoft Office 2019 ensuring the latest v21.1

\* Requires a valid subscription.

### Powerful sales & marketing features that make growing your small business even easier!



### Technology Updates

Act! v21 includes several technology improvements, helping to increase the stability and security of the software:

Microsoft® .NET Framework 4.7 - Key technology update to the latest supported .NET version.

Microsoft® SQL Server 2014 SP2 Express

Support TLS 1.2 - Provider of SaaS (Software as a Service) fully SOC 2 certified

## Opportunity Enhancements

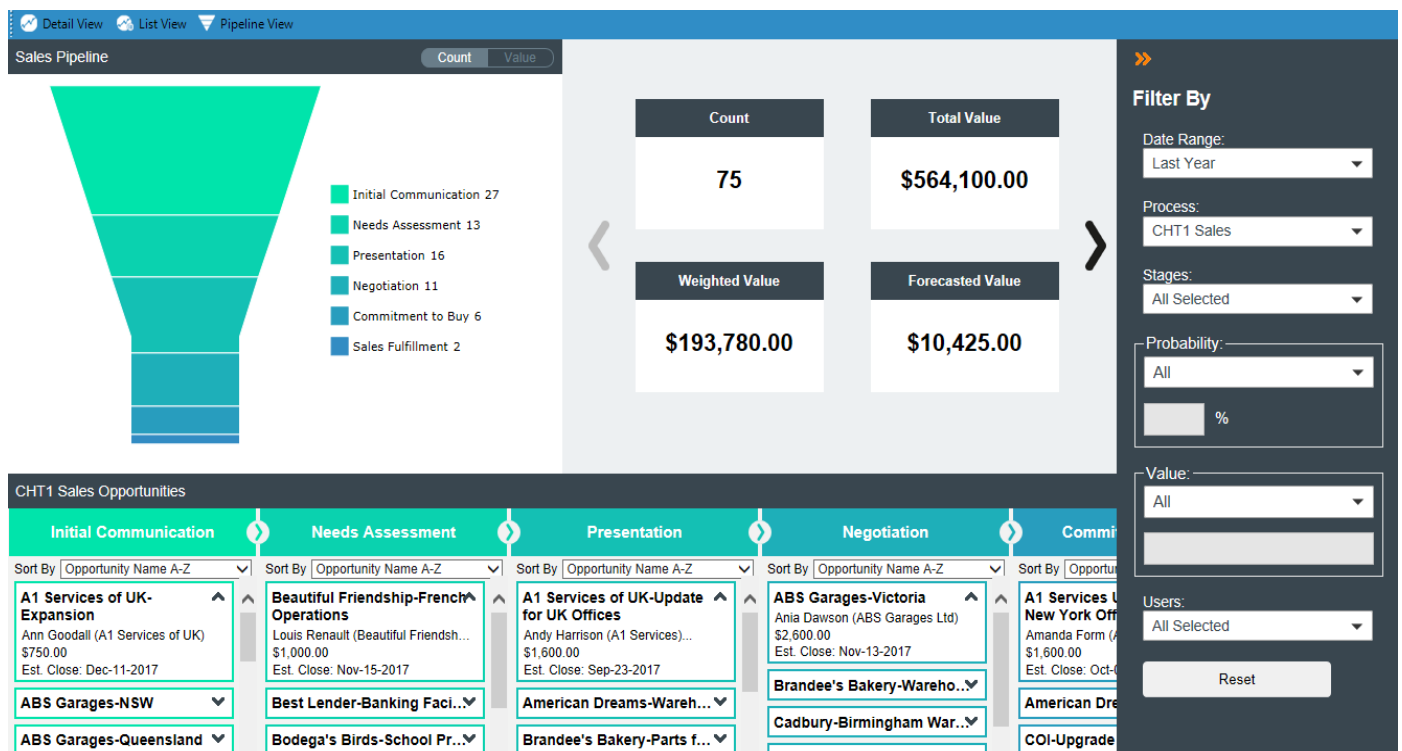
**Interactive sales funnel** with the total count and value of all open opportunities

**In-context KPIs** an instant roll-up of metrics like average deal size, closed-won value, open deals, and more (8 out-of-the-box or add your own)

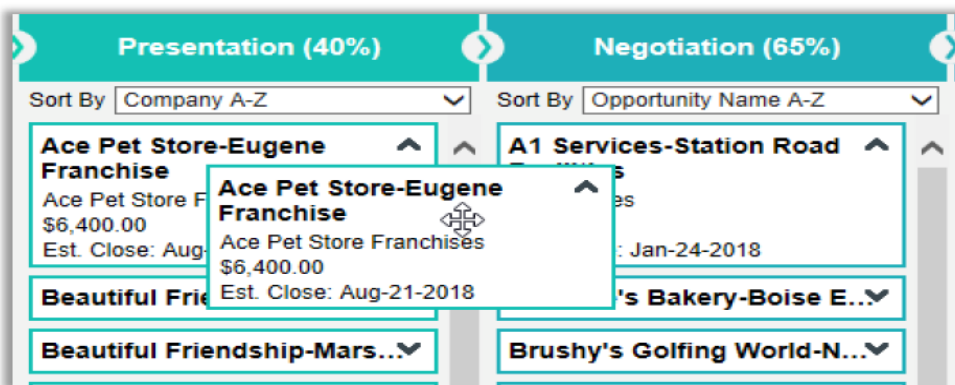
**Actionable sales pipeline** with a visual representation of all opportunities organized by sales stage and drag-and-drop functionality

**Advanced filters** to see data by rep, sales stage, date range, and more

### Opportunity Pipeline View with Custom Tables and Kanban Board

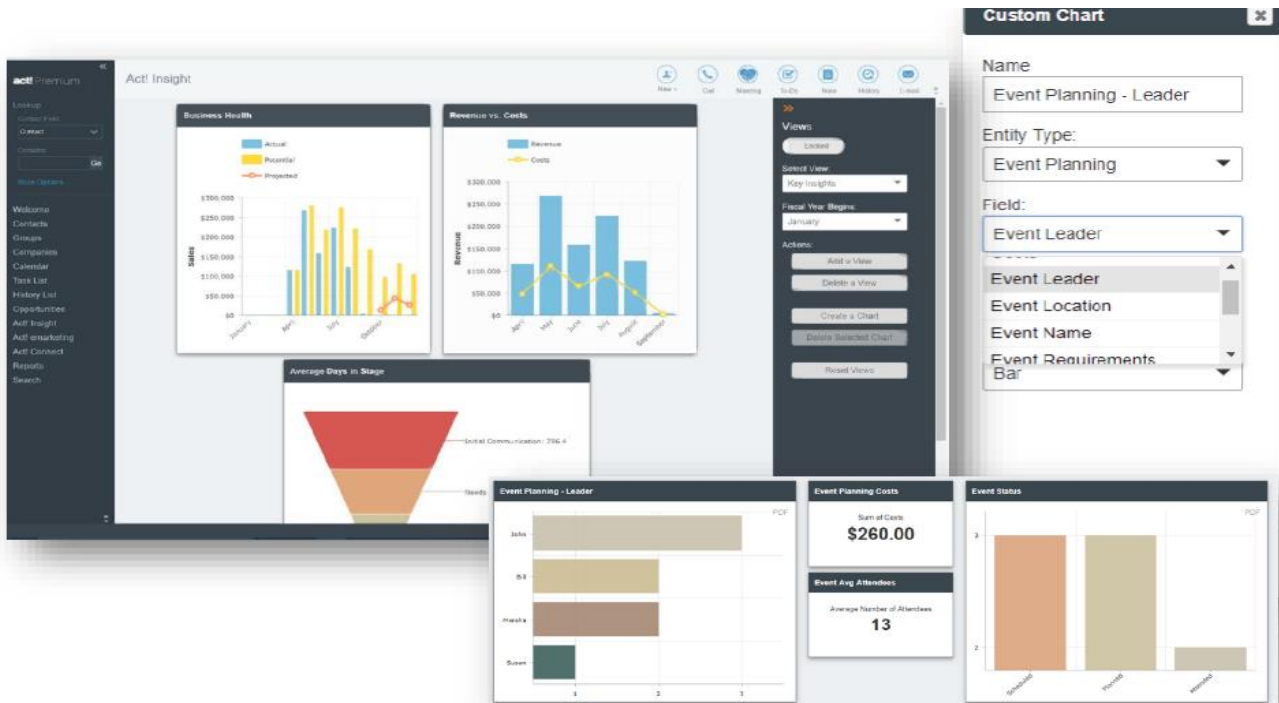


**New in Act! v21 Premium/Web** is a refreshed take on how users interact and work within their Opportunity views. New to the list view are exciting new features, such as KPIs at the top of the list that will contextually display information from in the list, and the addition of the all-new contextual menu, which will now display the opportunity



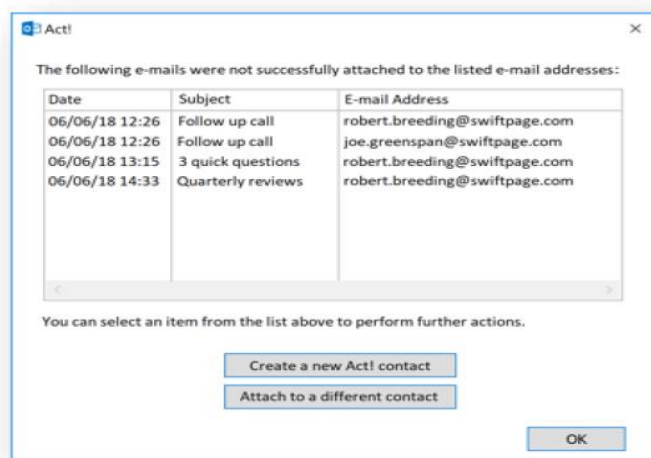
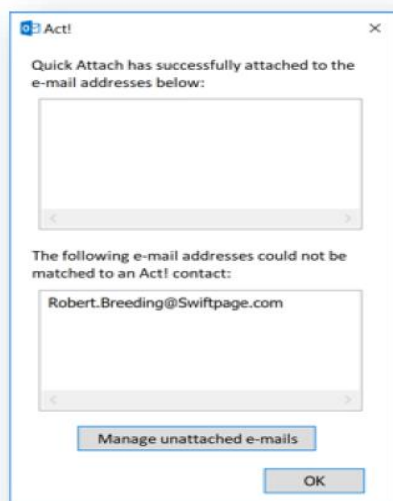
## Available exclusively with Act! Premium Plus!

A new addition to the Act! Insight view is the ability to create custom charts leveraging data stored in a user's implementation of Custom Tables. Previously, there was the ability to create custom views and charts but now v21 will allow users to select a Custom Table entity and a field from that Custom Table.



## Outlook Integration - Attach Inbound Emails

Previous Act! functionality allowed history to be automatically recorded from emails received to Microsoft Outlook. This functionality was lost from Outlook versions 2013 onwards due the Custom Actions feature being removed from email rules. This functionality has now been re-implemented using and updated email attachment mechanism. This feature is available in both the desktop and web versions of Act!



## Web & Cloud Experience

### Intelligent update:

- Alert offline client users to product updates
- Improved user experience and reduced support calls

### Custom Tables enhancements:

- Feature improvements prioritized from external feedback
- Improved web client functionality and user experience

Act! v21 brings a host of improvements to the Custom Tables Manager, driven by customer and ACC feedback. These improvements greatly enhance the experience of web and cloud users, as well as adding usability enhancements, which help customers, work quicker and smarter.

### Mail Merge via Web

The ability to mail merge to Word or Email has now been added to the web client.

### Configure Cascading Dropdowns via Web

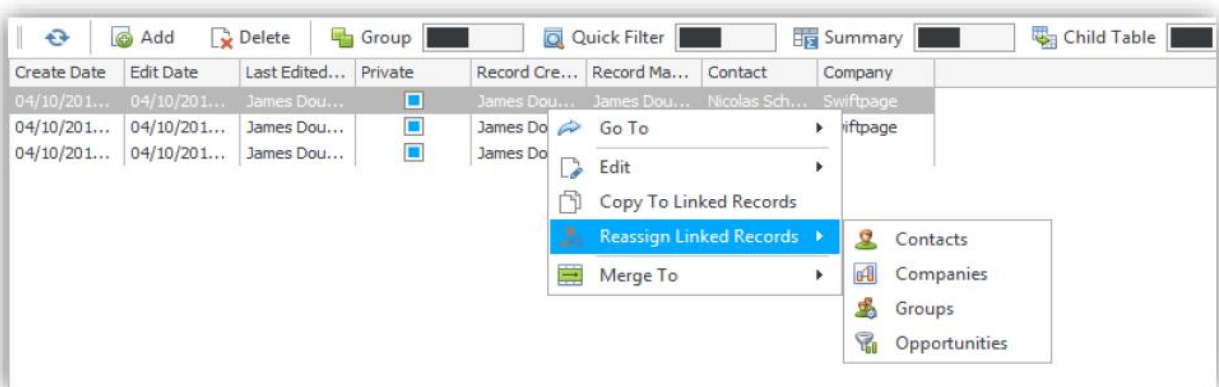
It is now possible to create and configure Cascading Dropdowns in the web client.

### Specify Default Columns via Web

The ability to configure default columns has been added to the web client.

### Quickly Assign Records to an Entity

Depending on how a custom table has been created, users can associate their custom table records to contacts, groups, companies or opportunities. Currently this association must be made from within the custom table record. New to v21 is the ability to assign a custom table record directly from a specific contact, group, company or opportunity record.



### Nested Child Table Records in List Views

Users can create multiple custom tables, which have a relationship between each other. Currently these relationships are visible if a child table is added to the parent table's layout. New to v21 is the ability to view related records from the parent table's list view.

## Improved web client functionality:

- Manage activity types via web

## Activation wizard

To improve the onboarding experience for new Act! customers, and to facilitate customers growing their Act! implementation, we have made several improvements to the activation process:

Activating a license no longer requires users to 'run as admin'.

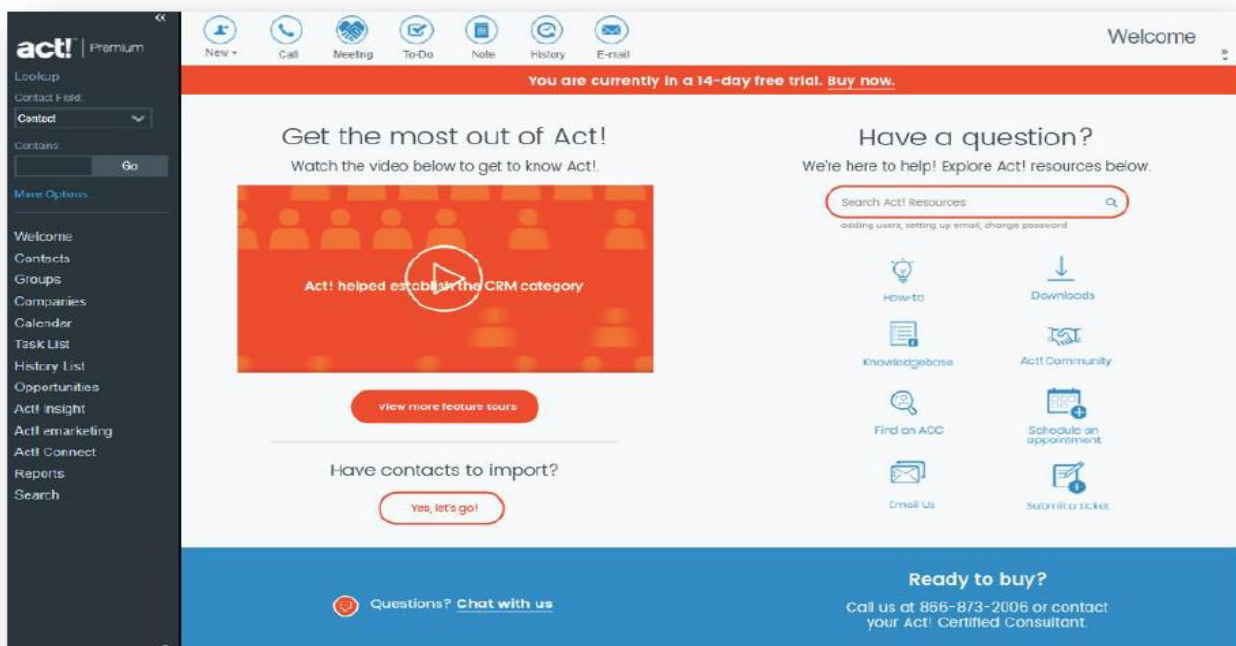
The activation wizard has been shortened.

Messaging throughout the wizard has been simplified. This now refers to 'activation' rather than 'registration', and provides clearer guidance through the process.

The outdated registration survey has been removed. Note that customers will still need to enter their contact details on first activation.

## New Look Welcome screen

Enjoy convenient access to feature tours, import options, and customer support resources!



## ACT! Marketing Automation AMA - Features at-a-glance

### Templates

There are 2 Template editors to use: Drag-and-Drop and WYSIWYG

Easy to create templates or import your own

### Drip Marketing

Create intelligent email campaigns that can send automatically on a schedule

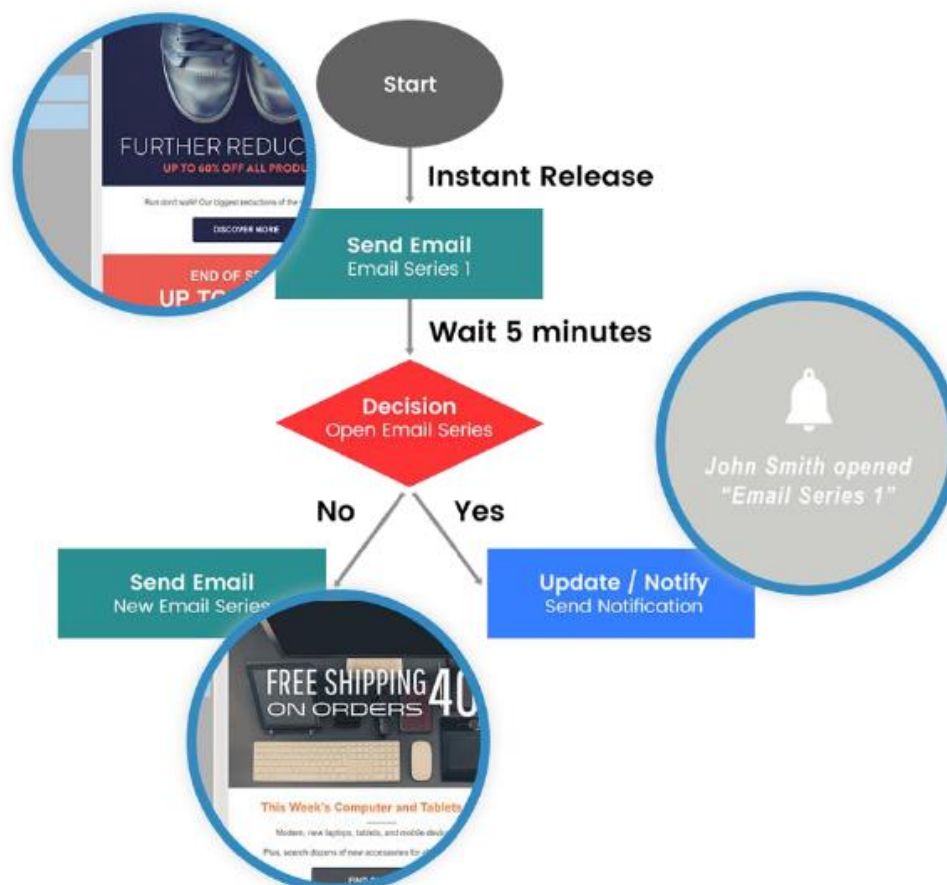
Can be based on triggers or actions of your previous recipients

### Landing Pages/Web Activity

Great way of creating webforms for leads and opt-ins to your email campaigns

Use HTML script to embed forms into your website

### Work Flow for Intelligent Campaign



## AMA Features in More detail.

**Campaign management:** Send beautiful, responsive email campaigns to your Act! contacts and groups. Dynamically merge fields into your campaigns from Act!

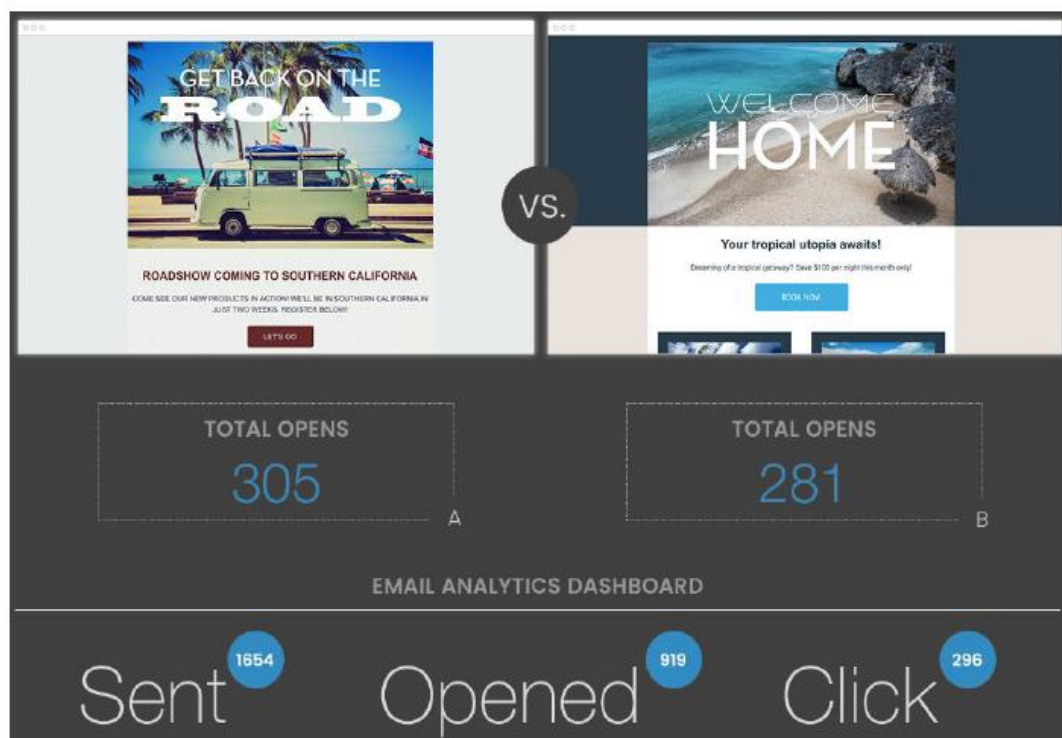
**Interactive template editor:** Build responsive email campaigns using the interactive template editor. Get started with 25 sample templates, and then customize imagery, colors, fonts, and more to fit your brand. Import photos from repositories like Dropbox or use one of over 500,000 free, high-quality stock photos via Unsplash, Pexels, and Pixabay.

**Mobile & desktop preview:** View desktop and mobile email campaign previews to ensure your images, copy, and other campaign components render perfectly before you send.

**Social sharing:** Publish campaigns to social sites like Facebook, LinkedIn, and Twitter to engage your social networks and expand your reach. Drive traffic to your social networks with social buttons in the footer of your campaigns.

**Visual workflow designer:** Use the visual workflow designer, which provides a graphical representation of your communication flow, to easily build multi-stage campaigns. Edit existing stages or add new ones from this intuitive workflow view

### Drip Marketing Campaign



**Drip marketing:** Build multi-stage drip campaigns using the visual campaign workflow designer to send a series of automated campaigns or communications to your prospects and customers. View email statistics and manage subscribers in each stage of your drip campaigns.

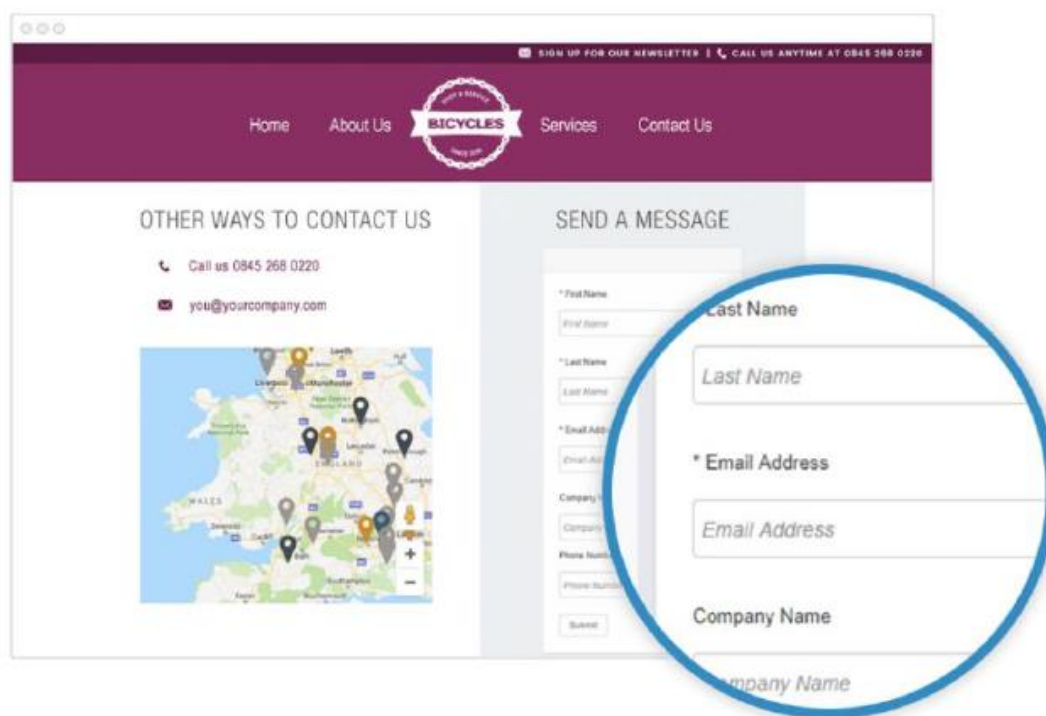
**Surveys:** Create online surveys and polls using multiple question types, including radio buttons, sliders, ratings, and more to gather information about your prospects and customers. Responses are mapped to fields in Act! automatically for richer prospect and customer profiles.

**Real-time campaign metrics:** View real-time campaign metrics, covering opens, clicks, and comparative stats per campaign or company-wide against a time range you apply to understand the success of your campaigns and improve your marketing strategy over time. Individual campaign results push to Act! contact records automatically for a detailed interaction history.

**CRM workflow with prioritized sales follow-up:** Automate workflow between sales and marketing to maximize engagement at every phase of the customer journey. Watch as Act! Marketing Automation turns real-time response metrics into sales actions—alerting you of new prospects, prioritizing follow-ups, and delivering a composite view of engagement in a single solution. Notify Act! users via email and create Act! activities and opportunities automatically based on campaign and website interactions completed lead forms and surveys.

**Response-driven nurture marketing:** Build highly personalized, response-driven nurture marketing campaigns using the visual campaign workflow designer and let Act! Marketing Automation do the work for you. Campaigns are automatically triggered by recipient responses, based on criteria you define.

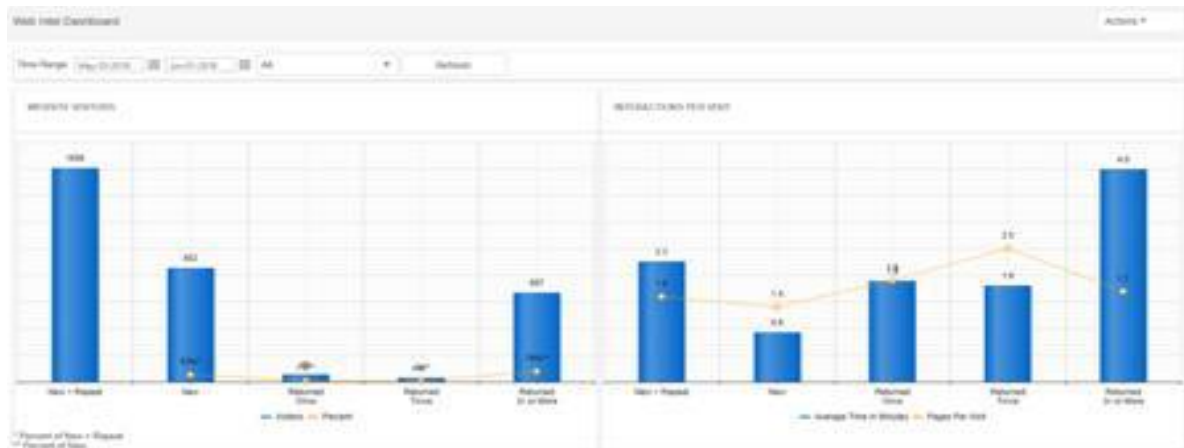
**Landing pages & lead capture:** Design effective lead capture forms on landing pages or embed forms on your website to grow your prospect database. New leads are automatically added to Act! once a form is completed

The image shows a screenshot of a website landing page for a business named 'BICYCLES'. The page has a dark purple header with navigation links: 'Home', 'About Us', 'BICYCLES' (with a logo), 'Services', and 'Contact Us'. Below the header, there are two main sections. On the left, titled 'OTHER WAYS TO CONTACT US', it includes a phone number '0845 268 0220', an email 'you@yourcompany.com', and a map of the United Kingdom with several location pins. On the right, titled 'SEND A MESSAGE', there is a lead capture form. The form fields are: '\* First Name', '\* Last Name', '\* Email Address', 'Company Name', and 'Phone Number'. A blue circle highlights the 'SEND A MESSAGE' form area. The form also includes a 'Submit' button and a 'Cancel' button.

**Advanced lead capture & surveys:** Take lead capture and surveys to the next level with advanced forms and surveys that allow further actions in Act! Create Act! activities and opportunities automatically based on recipient responses. Send notifications to Act! users when responses come in. Even load contacts into specific campaigns automatically.

**Event marketing:** Host successful webcasts, tradeshow, and more with a nurture template designed for marketing events. Send event invitations, gather registration information, track attendees, send thank you emails, and more.

**Website activity tracking & analytics:** Identify prospects on your website in real-time to engage with them when they are most interested. See who's been on your site today, yesterday, this week, last week, or the last 30 days. Gain rich insights with the web intel dashboard for visitor profiling, interactions per visit, visitor bounce rates, traffic sources, and entry and exit pages. Web visits feed into lead scoring profiles and create activities for sales follow-ups in Act! automatically.



**A/B testing:** Test specific elements of two campaigns to pinpoint your most impactful subject lines, email content, and more. Use the results to continually improve your content.

## AMA Plans and Pricing

MOST POPULAR		
Select	Complete	Advanced
<ul style="list-style-type: none"> <li>Email marketing</li> <li>Interactive template editor</li> <li>Mobile &amp; desktop preview</li> <li>Social sharing</li> <li>Landing pages &amp; lead capture</li> <li>Surveys</li> <li>Drip marketing</li> <li>Visual workflow designer</li> <li>Real-time campaign metrics</li> <li>Deliverability &amp; compliance tools</li> <li>Getting Started Concierge</li> </ul>	<p>Includes Select features, plus:</p> <ul style="list-style-type: none"> <li>CRM workflow with prioritized sales follow-up</li> <li>Response-driven nurture marketing</li> <li>Advanced lead capture &amp; surveys</li> <li>Event marketing</li> <li>Lead management &amp; scoring</li> <li>Website activity tracking &amp; analytics</li> </ul>	<p>Includes Complete features, plus:</p> <ul style="list-style-type: none"> <li>HTML email editor</li> <li>Multi-stage lead profiling</li> <li>A/B testing</li> <li>Deliverability &amp; marketing consulting services</li> </ul>

Act! Marketing Automation Plans & Pricing		
Select	Complete	Advanced
<p><b>Essential marketing automation features to engage your customers and grow your business</b></p> <p><i>10,000 emails per month to unlimited contacts</i></p> <p><i>*Additional emails extra</i></p> <p><b>\$79</b> <b>£59</b> <b>€69</b></p> <p><b>account/month (billed annually)</b></p>	<p><b>Robust marketing automation features and time-saving CRM workflow to connect your sales and marketing efforts</b></p> <p><i>50,000 emails per month to unlimited contacts</i></p> <p><i>*Additional emails extra</i></p> <p><b>\$199</b> <b>£149</b> <b>€159</b></p> <p><b>account/month (billed annually)</b></p>	<p><b>Sophisticated marketing automation features and valuable consulting services to accelerate your success</b></p> <p><i>100,000 emails per month to unlimited contacts</i></p> <p><i>*Additional emails extra</i></p> <p><b>\$399</b> <b>£299</b> <b>€319</b></p> <p><b>account/month (billed annually)</b></p>
<p><b>**Additional 2,500 email sends per month for £132 / €144 per year</b></p>		

# System Requirements

## Act! Premium v21 (access via Windows®)

### System Requirements<sup>1</sup>

- ☐ 4 GB available hard disk space<sup>2</sup>
- ☐ 1280 x 768 or higher resolution monitor
- ☐ Broadband Internet connection
- ☐ 2 GB system memory, 4GB for 64-bit OS
- ☐ 1.8 GHz processor
- ☐ Microsoft Update Service must be current and running

### Works With

- ☐ Microsoft® Office 2016 and 2013
- ☐ Microsoft® Exchange and Office 365 for contact and calendar synchronization
- ☐ Internet Mail SMTP / POP33

Further information around Exchange support is available [here](#).

### Supported Operating Systems<sup>4</sup>

- ☐ Windows Server 2016 (64-bit)
- ☐ Windows Server 2008 R2 (64-bit)<sup>5</sup>
- ☐ Windows Server 2012 (64-bit)
- ☐ Windows Server 2012 R2 (64-bit)
- ☐ Windows 10 (32-bit and 64-bit)
- ☐ Windows 8.1 (32-bit and 64-bit)
- ☐ Windows 8.1 Pro (32-bit and 64-bit)
- ☐ Windows 8.1 Enterprise (32-bit and 64-bit)
- ☐ Windows 7 SP1 (32-bit and 64-bit)

### Database Server

Act! Premium uses SQL Server® 2014 Express or your existing installation of SQL Server 2008 R2 or newer. If you would like to use a different edition of SQL Server other than the one provided, please consult Microsoft documentation for specific hardware and software requirements for that edition.

## Act! Premium v21 (access via web or mobile)

### Server System Requirements<sup>1</sup>

- ☐ 4 GB available hard disk space<sup>2</sup>
- ☐ 1280 x 768 or higher resolution monitor
- ☐ Broadband Internet connection
- ☐ 2 GB system memory, 4 GB for 64-bit OS
- ☐ 1.8 GHz processor
- ☐ Network Interface Card
- ☐ Router and/or Firewall that supports IPv4 NAT or IPv6

### Supported Operating Systems<sup>4</sup>

- ☐ Windows Server 2016 (64-bit)

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- ☐ Windows Server 2008 R2 (64-bit)<sup>5</sup>
- ☐ Windows Server 2012 (64-bit)
- ☐ Windows Server 2012 R2 (64-bit)
- ☐ Windows 10 (32-bit and 64-bit)
- ☐ Windows 8.1 (32-bit and 64-bit)
- ☐ Windows 8.1 Pro (32-bit and 64-bit)
- ☐ Windows 8.1 Enterprise (32-bit and 64-bit)
- ☐ Windows 7 SP1 (32-bit and 64-bit)

### **Database Server**

Act! Premium uses SQL Server® 2014 Express or your existing installation of SQL Server 2008 R2 or newer. If you would like to use a different edition of SQL Server other than the one provided, please consult Microsoft documentation for specific hardware and software requirements for that edition.

### **Supported Browsers**

- ☐ Microsoft Internet Explorer® 11
- ☐ Google Chrome™ Browser for Windows
- ☐ Google Chrome™ Browser for Mac

### **Supported Office Integrations**

- ☐ Microsoft® Office 2016 and 2013
- ☐ Microsoft® Exchange and Office 365 for contact and calendar synchronization
- ☐ .NET 4.7 (required for integration features only)

Further information around Exchange support is available [here](#).

### **Mobile Client System Requirements**

- ☐ Safari® for iPad®
- ☐ Safari® for iPhone®
- ☐ Google Chrome™ Browser for Android
- ☐ Internet access to Act! Premium for Web IIS server

### **SQL Server Edition Recommendations**

SQL Express limits processor use to a single CPU but allowing multiple cores, memory used by SQL to 1 GB, and the size of your data file to 10GB. For this reason, we recommend SQL Standard for any deployment over 20 users or 5 GB in size, allowing for growth. Individual performance may vary based on actual database size, hardware variations, and product usage.