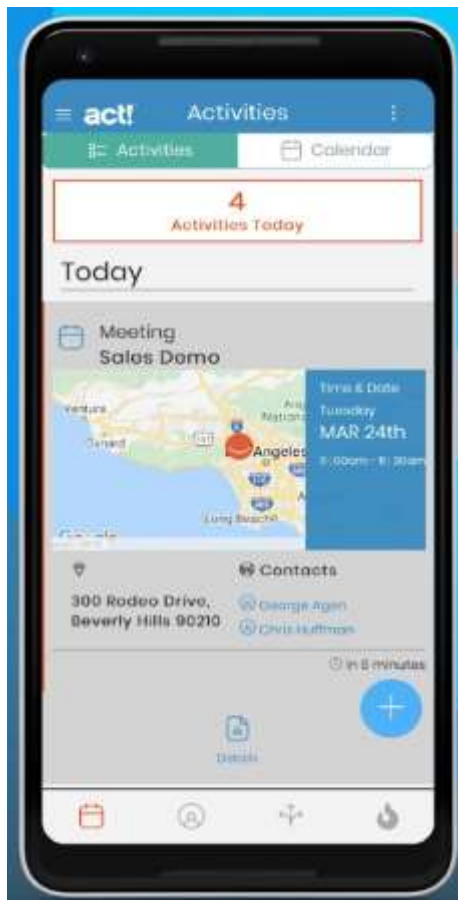


Act! Companion 2.9 Release June 2020

Features

Contact & company details

Enjoy everywhere access to Act! contact, group, and company details. Add a prospect or update a customer's info easily on the fly. Scan business cards and use powerful search capabilities to help you find the info you need in an instant.



Interactive maps

Know more about where you're going and what's around with interactive maps in contact and company views. Get driving directions, find nearby restaurants and transportation, or locate Act! customers in the area with heat maps.

Calendar, activities, & history

Stay in control of your day with an organised view of your calls, meetings, and to-dos. Schedule or update activities in Act! and/or your native device calendar. Capture history and use configurable notifications to ensure you stay productive.

Sales pipeline management

Progress deals from anywhere, with your pipeline always at your fingertips. View Hot Leads or see your opportunities in list, detail, and snapshot views. As deals progress, easily update or close opportunities right from the app.

Actionable dashboards

Gain insight into business and team performance with actionable Act! Insight dashboards. See dynamic, visual snapshots of real-time metrics for team performance, top selling products, win/loss analysis, campaigns, and more.

Features of the Act! Companion app

Access information from your office or home database live on your mobile app.

Contacts

- o Search for and view Act! database contact details live
- o Call, email or SMS message from a contact record
- o Create new contacts into your Act! database
- o Scan business cards and add those details into your Act! database
- o Edit existing contacts
- o Delete contacts
- o Mapping functionality – see location details and get driving directions
- o Attach documents and view attachments within the app

Activities

- o View upcoming events and get pop-up notifications on your mobile device
- o Create new activities with your contacts or personal to-dos
- o Edit existing activities
- o Filter Activities by Date Range, Activity Type, Users, Contact and Access Type
- Calendar
- o See your activities in a calendar view
- o View calendar in year, month and day format

Histories

- o View histories in your database
- o Create histories for contacts or yourself
- o Filter Histories by Date Range, History Type, Users and Access Type

Act! Insight

- o View database Insight charts in chart and list view
- o Change between Insight views

- o Filter on selected charts

Opportunities

- o View and filter your opportunities
- o See and edit details of your database opportunities
- o Create opportunities on the go

Companies

- o See details of your database companies
- o Create and edit companies on the go

Groups

- o View database Groups in the app
- o Create new Groups and add Contacts
- o Associate Opportunities, Histories and add Documents

Proximity Search

- o See contact records within your current local area, or an area of your choosing
- o Choose your own radius to perform a condensed search or a wider area search
- o Show directions to reach contacts within your specified proximity

Global Search/enhanced lookups and filters

- o Search across Contacts, Companies, Opportunities, Activities and Histories.
- o Enhanced lookups in list views

Favorites

- o Add Companies/Groups/Contacts/Opportunities/Notes to the favorites section
- o Easily access and filter your most important records.

Companion Notes.

System requirements & compatibility

Works with iOS versions 10.x and up, and Android Lollipop version and up. Available with Act! Growth Suite Professional, Premier, and Ultimate.

Setup & configuration notes

Requires an active Act! subscription and use of either [Act! API](#) or [Act! Connect Link](#) depending on deployment method. The Act! API is pre-enabled for Act! in the Cloud. Users will be required to provide a URL to establish a connection to Act! Connect. [See details.](#)

