Act! CRM (SaaS) Compare Features

✔ ALL FEATURES ✔ SOME FEATURES – NOT INCLUDED

[+] EXPAND ALL	Essentials	Standard	Expert
[-] CRM	✔	✔	✔
RELATIONSHIP & ACTIVITY MANAGEMENT			
Customer management	✔	✔	✔
Task & activity management	✔	✔	✔
Calendar	✔	✔	✔
Notes & history	✔	✔	✔
Companies	✔	✔	✔
Relationship timeline	✔	✔	✔
Secondary contacts	✔	✔	✔
In-context maps & web info	✔	✔	✔
Call List & Hot Leads	✔	✔	✔
Notifications & alerts	✔	✔	✔
Act! Companion - Mobile app	✔	✔	✔
Welcome page - User productivity dashboard	Standard[1]	Standard[1]	Custom
Mail merge	–	✔	✔
GROUPS & SEARCH			
Search & lookups	✔	✔	✔
Groups & filters	✔	✔	✔
Dynamic groups	–	Standard[2]	Custom
Advanced queries	–	–	✔

OPPORTUNITY & PIPELINE MANAGEMENT			
Opportunity management	✓	✓	✓
Sales process management	✓	✓	✓
Products & pricing	✓	✓	✓
Sales pipeline management view	–	–	✓
Sales KPIs - Standard & custom	–	–	✓
Sales opportunity Kanban board	–	–	✓
REPORTING & ANALYTICS			
Reporting	✓	✓	✓
Act! Insight - Dashboards & analytics	–	Standard[3]	Custom
INTEGRATIONS			
Office integration - Export to Excel/Word	✓	✓	✓
Outlook integration - Contacts/Calendar/Email	–	✓	✓
Google integration - Contacts/Calendar/Email	–	✓	✓
Act! Connect - Integration with popular apps	–	✓	✓
ADMINISTRATION & CUSTOMIZATION			
Preferences	✓	✓	✓
User management	✓	✓	✓
Layout designer	✓	✓	✓
Team management	–	✓	✓
Custom Fields	Partial[4]	Partial[4]	✓
Custom Tables	£8 user/mo	£8 user/mo	£8 user/mo
PLATFORM & TECHNOLOGY			
Data import tool	✓	✓	✓
API	✓	✓	✓
Cloud storage	2GB	4GB	6GB
Additional Cloud storage per 4GB		£4/mo	

[-] Marketing	✓	✓	✓
EMARKETING (INCLUDED)			
Email sends/mo	2,500	10,000	25,000
Email marketing	✓	✓	✓
170+ responsive templates	✓	✓	✓
Interactive template editor	✓	✓	✓
Email tracking & metrics	✓	✓	✓
Turnkey campaigns	✓	✓	✓
HTML email editor	✓	✓	✓
Social sharing	✓	✓	✓
Landing pages	✓	✓	✓
Surveys	✓	✓	✓
Drip marketing	✓	✓	✓
Visual workflow designer	✓	✓	✓
Campaign calendar	✓	✓	✓
Deliverability & compliance tools	✓	✓	✓
MARKETING AUTOMATION (OPTIONAL)			
Marketing Automation to CRM workflow	–	£79/mo	£79/mo
Response-driven nurture marketing	–		
Asset tracking	–		
Advanced lead capture	–		
Lead management & scoring	–		
Event marketing	–		
Website activity tracking	–		
Progressive profiling	–	£119/mo (includes £79 package)	£119/mo (includes £79 package)
A/B testing	–		

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SERVICES & ADD-ONS			
Additional email sends	Add'l 2,500 sends/mo £8/mo		
Additional domain (per domain)	£40/mo		
SMS - phone number + 500 sends/mo	£26[25]/mo		
SMS - per additional 500 sends/mo	£25/mo		

[-] Customer Support	✓	✓	✓
Getting started webinars / Q&A	✓	✓	✓
Self-service resources - Guides & video tutorials	✓	✓	✓
Knowledgebase	✓	✓	✓
In-product ticket submission	✓	✓	✓
Web chat	✓	✓	✓
Product support by phone[6]	–	✓	✓
Product support via remote access[6]	–	✓	✓
Saturday phone support	–	✓	✓
Appointment setting	–	✓	✓
Voicemail call back	–	✓	✓
Priority queuing	–	–	✓
Professional services[7]	£99/hr	£99/hr	£99/hr