# Sage Business Info Services for ACT! - Unlock a Rich Source of New Leads

**In this help document, you will learn the following:**

1) What Is Sage Business Info Services for ACT!?
2) Set Up Sage Business Info Services for ACT! Account
3) Building a List and Importing Contacts and Companies

## What Is Sage Business Info Services for ACT!?

Sage Business Info Services for ACT! (provided by Hoover's™) provides tools to access critical business information for your contacts and companies. With Sage Business Info Services for ACT!, you can:

- Build a list of companies and people and then import these lists directly into your database.
- Access links from the contact and company Web Info tab. These links provide key information about your contacts' and companies' profile, financial details, company contacts, industry information, and company news. You can import company and key contacts into the database.
- Subscribe to alerts to notify you when key changes occur for the contact or company.
- Subscribe to receive more detailed company, contact, competitive, and lead info
- Find new leads based on your targeted demographics
- Receive newsworthy email alerts from a company watch list

Once your customers are taken care of, shift your focus to Sage Business Info Services for ACT!, which pulls highly targeted prospect lists from Hoover's™ and puts them directly into Sage ACT!. Updating over 1 million records a day, it helps you fill in the gaps in your database and gives you access to more than 65 million companies and 85 million executives. Find new leads based on the traits you're looking for and make sure your mailed materials find their target with addresses and phone numbers that are properly formatted when imported. Start with a free version for basic company, financial, and industry info, or sign up for a subscription to get more detailed contact, company, competitor, and lead information.

**Take More Time to Build a Permission-based List**

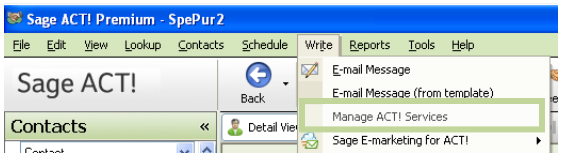
No e-mail addresses are available through Business Info Services for ACT! Sage E-mail Marketing for ACT! is a permission-based e-mail marketing service. The more time you take to build a permission-based list, the more responsive your list will be because they have requested to receive information from you. Every recipient of your email should have been clearly and fully notified of the collection and use of his or her email address and has consented prior to such collection and use. Consent is not required to be in writing in order to comply with a no tolerance SPAM policy. Services may be terminated if anyone is found to have violated the following conditions. The Federal CAN-SPAM Act was put into effect on January 1st, 2004 – and penalties for violations range from $250 to $2 million and affect nearly everyone who sends email. Policies also apply to anyone outside of the United States.

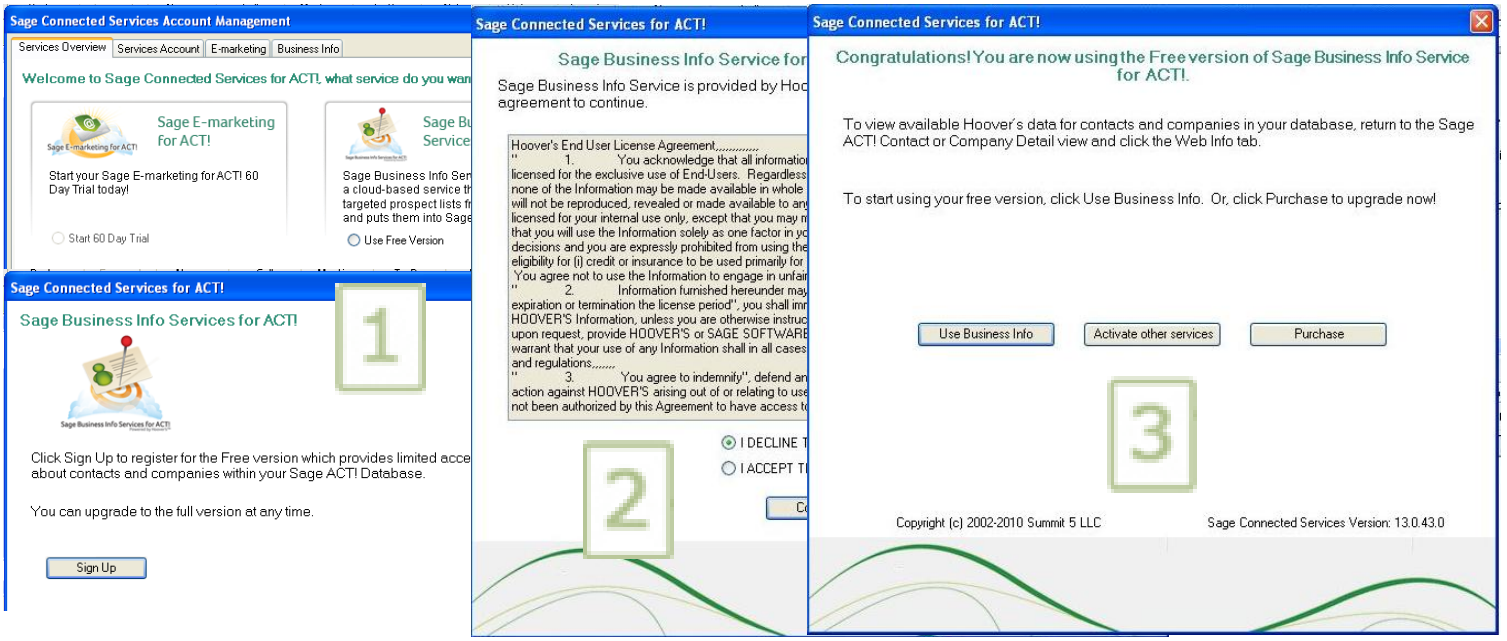
**Note:** A Hoover's account does not equal a Sage Business Info Services for ACT! account. To use Sage Business Info Services for ACT!, you need Internet access and a Sage Connected Services account.

## Set Up Sage Business Info Services for ACT! Account

**Open Sage Connected Services by doing one of the following:**

- From the Write menu, click Manage ACT! Services.
- Click the Sage Business Info Services for ACT! icon or the Sage E-marketing for ACT! icon located on the Contact, Group or Company view toolbar.
- Click on **Services Overview** or **Business Info**



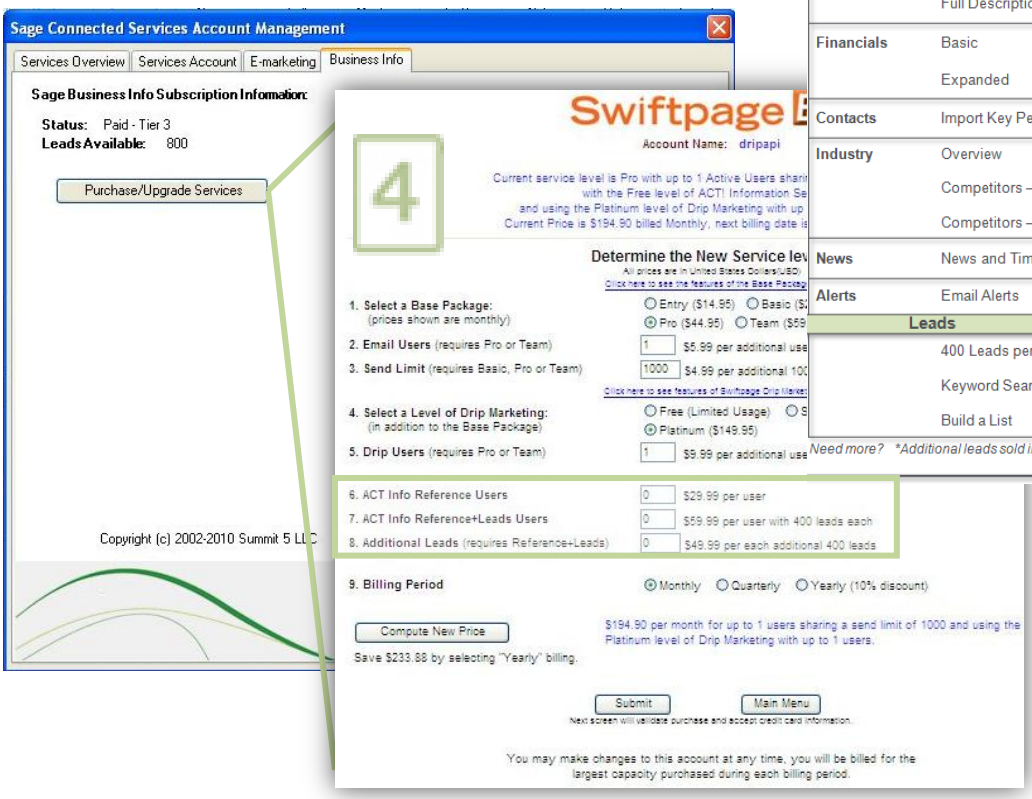




1. **Select Use Free Trial or Sign Up.**
2. **Accept the License Agreement for activation to occur.**
3. **Confirmation Screen Appears.**
4. **Purchase and upgrade options are now available.**

*Most popular!*

| | | Reference + Leads | Reference | Free Business Directory |
|---|---|---|---|---|
| **Business Info** | | | | |
| Profile | Line of Business | ✓ | ✓ | ✓ |
| | Full Description | ✓ | ✓ | |
| Financials | Basic | ✓ | ✓ | ✓ |
| | Expanded | ✓ | ✓ | |
| Contacts | Import Key People | ✓ | ✓ | |
| Industry | Overview | ✓ | ✓ | |
| | Competitors – Top 3 | ✓ | ✓ | ✓ |
| | Competitors – Full List | ✓ | ✓ | |
| News | News and Timeline | ✓ | ✓ | |
| Alerts | Email Alerts | ✓ | ✓ | |
| **Leads** | | | | |
| | 400 Leads per Month* | ✓ | | |
| | Keyword Search | ✓ | | |
| | Build a List | ✓ | | |

*Need more? *Additional leads sold in blocks of 400.*

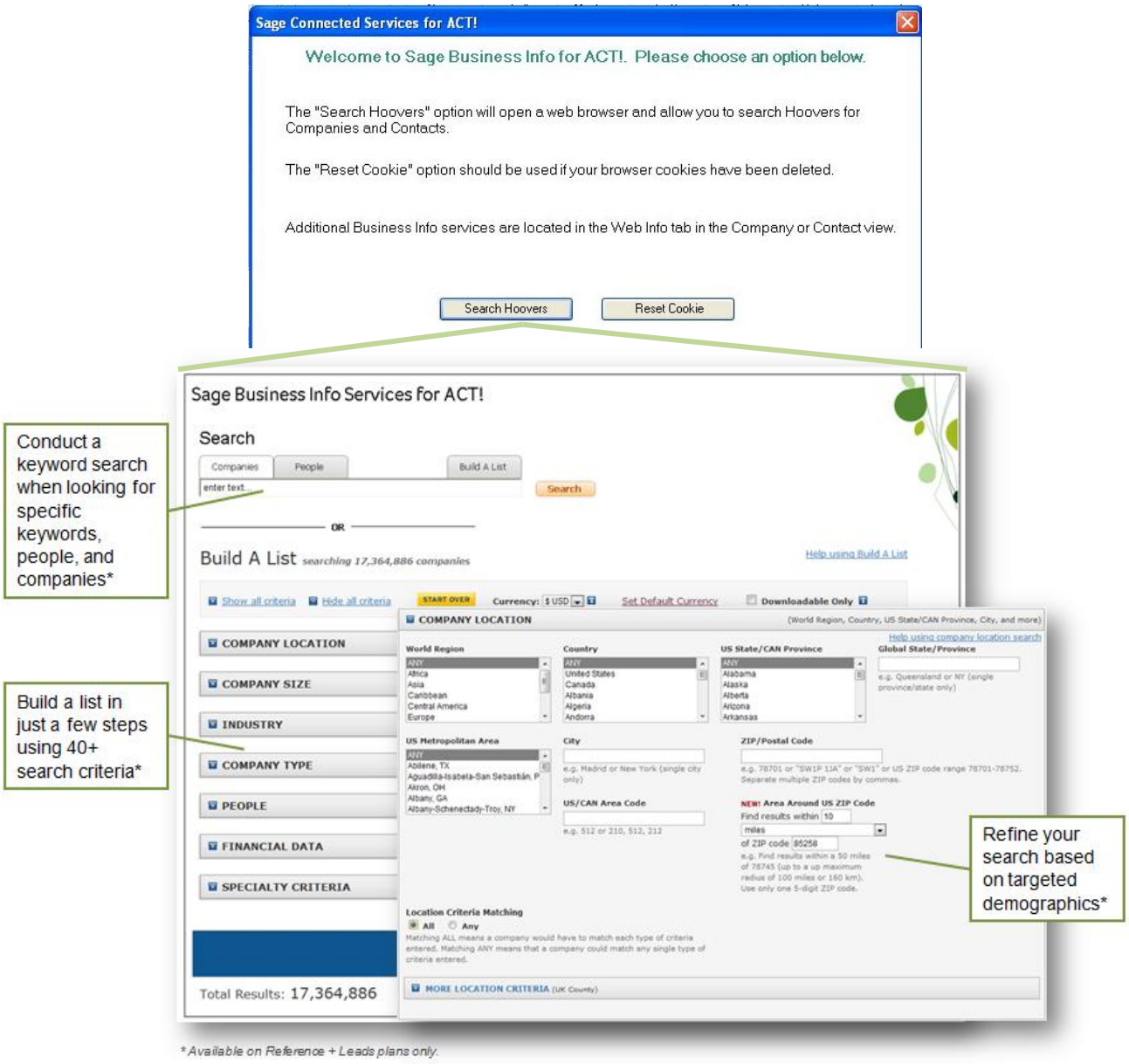


## Building a List and Importing Contacts and Companies

You can use Sage Business Info Services for ACT! to build a list of contacts or companies, and then import the lists into your database. Do the following to build a list of contacts or companies:

1. From the contact or company view toolbar, click the Sage Business Info Services for ACT! tool (to the right of the layout list). Or, from the Lookup menu, click Sage Business Info Services for ACT!.
2. Depending on the type of records you want to search, click the Companies or People tab.
3. In the field, type the information you are looking for.
4. By default, search criteria is set to ANY filters, such as Company Location (Any World Region or Country). To focus the search, click the + sign by the criteria level (such as Company Location) to see available filters. Or, to see all criteria levels, click Show All Criteria.
5. Click Search. The results list appears. You can use the paging controls to view all items in the list.
6. Select items from the lists or type a value in the fields. For example, focus the search on companies in Europe that have annual sales from 2 to 3 million dollars. Use the scroll bar to view the available criteria filters.

**Tip:** If you do not get the results you want, click Edit Criteria. To clear all filters and start over, click Start Over.




*Available on Reference + Leads plans only.