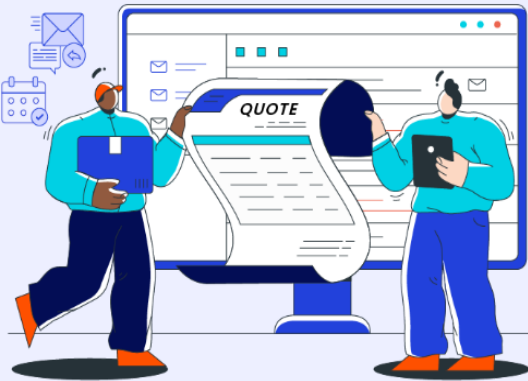# Generate & Manage Quotes with Ease

Act! Interactive Quotes lets you create, customise, and send interactive quotes in seconds, keeping your sales pipeline moving.

✓ Create custom quotes & templates that match your brand and pricing structure

✓ Send quotes instantly from any device— via Act!

✓ Track quote views in real time to follow up at the right moment

Automate Follow-Ups & Close More Deals

Take the guesswork out of sales. Act! Interactive Quotes automates follow-ups, reminders, and payment processing, so you can focus on closing deals.

✓ Schedule automated reminders to keep quotes top of mind for prospects

✓ Process secure payments upon acceptance to finalise sales faster

✓ Monitor sales performance with reports tracking open, closed, and expired quotes

Interactive Quotes is included with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Interactive Quotes**

Create, send, and accept online quotations with ease—perfect for individual users managing their own sales process.

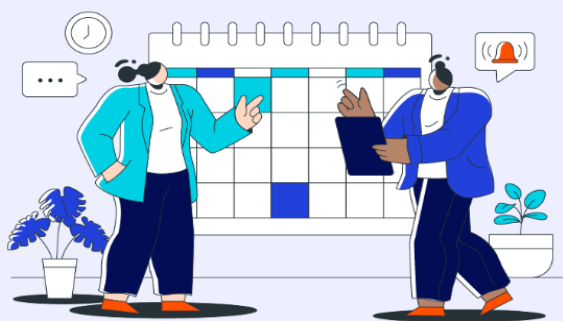## Act! Advantage Professional & Ultimate

Includes **Advanced Interactive Quotes**

Everything in Standard, plus multi-user support for teams and organisations, advanced reporting for deeper insights, and the ability to select email templates on the fly for faster, more consistent communication.

Let Clients Book Time with You—Instantly

Stop wasting time coordinating schedules. Act! Online Appointment Scheduling lets you share your availability, accept bookings, and keep your calendar updated automatically.

✓ Share your calendar with a unique online link for easy booking

✓ Read from and write to your Act! calendar in real time to prevent scheduling conflicts

✓ Send automated confirmations & invites to keep everyone informed

Customise, Optimise & Stay in Control

Tailor your scheduling system to fit your business needs. Customise availability, manage blackout dates, and even monetise meetings with integrated billing options.

✓ Set custom work hours & blackout dates to control your availability

✓ Display your calendar across digital spaces—email, website, and social media

✓ Organise bookings into teams to assign meetings to the right staff automatically

Online Appointment Scheduling is included with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Online Appointment Scheduling**

Let clients view your availability and book appointments instantly. Meetings are automatically added to your Act! calendar, and new contacts are created if they don't already exist. Both you and your client receive instant booking confirmations.
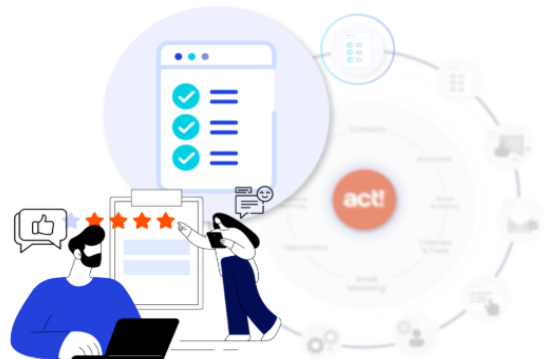
Act! Advantage Professional & Ultimate

Includes **Advanced Online Appointment Scheduling**

Everything in Standard, plus a shared team calendar that combines team availability into one view—making it easy for clients to book with the next available representative. Also includes meeting reminders and support for paid appointments—streamlining scheduling for your entire team.

Collect Actionable Customer Feedback

Understanding your customers is key to offering better products, services, and experiences. Act! Online Surveys allows you to create custom, interactive surveys that help you gather relevant, high-quality feedback.

✓ Create interactive, custom-branded surveys

✓ Use skip logic to ask only relevant questions

✓ Boost response rates with an easy, mobile-friendly interface

Seamlessly Collect & Act on Customer Insights

Act! Online Surveys works directly inside Act!, so you can automatically store and leverage customer feedback without switching platforms.

✓ Map survey data to contact records for real-time insights

✓ Automatically categorise responses for targeted engagement

✓ Set up personalised actions based on customer feedback

Online Surveys is available with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Online Surveys**

Easily create and publish online surveys to collect customer insights, automated follow-ups—perfect for individual users.

Includes one designated user

Act! Advantage Professional & Ultimate
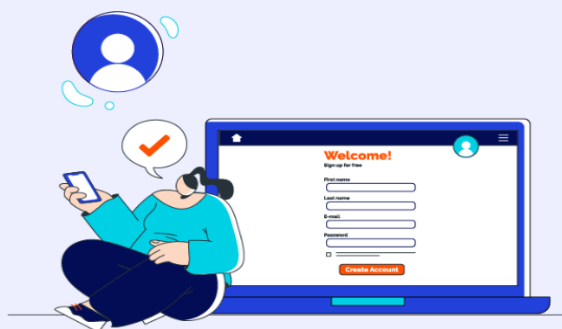
Includes **Advanced Online Surveys**

Everything in Standard, plus drip email campaigns and shared images to boost engagement and responses.

Included for all users

Turn Online Form Submissions into Actionable Leads

Stop wasting time manually entering customer data. Act! Web Lead Forms automatically updates contact records, triggers follow-ups, and categorises leads, so you can focus on closing deals.

✓ Create fully customisable web forms for lead generation, surveys, or requests

✓ Auto-update or create a new Act! contacts based on form submissions

✓ Trigger automated follow-ups to nurture leads and improve engagement

Streamline Data Collection & Improve Customer Insights

Act! Web Lead Forms gives you the tools to track, analyse, and act on customer feedback. Run reports, segment responses, and ensure every form submission becomes valuable business insights.

✓ Run detailed reports to analyse customer responses and engagement

✓ Categorize and segment leads to personalise follow-ups and boost conversions

✓ Secure your data with built-in access controls and spam protection

Web Lead Forms is included with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Web Lead Forms**

Embed customisable contact forms and publish online forms and questionnaires to efficiently collect customer data—no coding required. All submissions sync seamlessly into Act!, making it easy to capture and manage insights in one place.

Includes one designated user

Act! Advantage Professional & Ultimate

Includes **Advanced Web Lead Forms**

Everything in Standard, plus the ability to trigger drip campaigns, create opportunities directly from form submissions, and share images to enrich customer interactions.

Included for all users

Engage Website Visitors in Real-Time

Act! Website Chat lets you connect with customers and prospects instantly through live chat on your website. Capture leads, provide support, and keep conversations organised—all while ensuring seamless follow-ups inside Act!.

✓ Chat with website visitors in real-time

✓ Automatically log chat history inside Act!

✓ Turn conversations into leads effortlessly

Maintain Conversations & Strengthen Relationships

With Act! Website Chat, every interaction is tracked, stored, and actionable. You can assign follow-ups, send surveys, and continue conversations seamlessly, ensuring no lead goes unnoticed.

✓ Schedule follow-ups after each chat to nurture leads

✓ Send chat transcripts via email for easy record-keeping

✓ Integrate chat with Act! Web Lead Forms & Online Surveys for deeper insights

Website Chat is included with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Website Chat**

Add a live chat widget to your website to provide real-time customer assistance and improve engagement.

Includes one designated user

Act! Advantage Professional & Ultimate
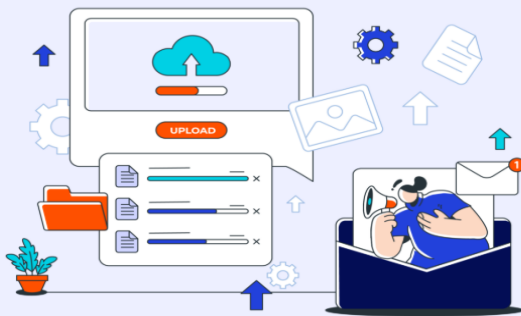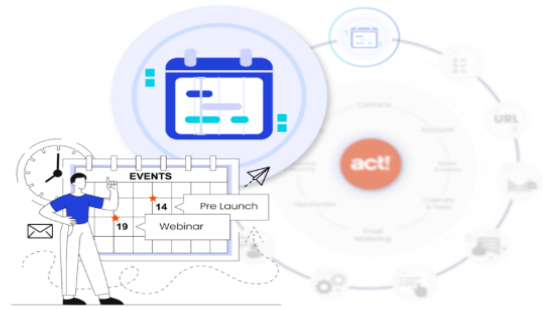
Includes **Advanced Website Chat**

Everything in Standard, plus support for multiple chat users and multiple websites. Department-based routing ensures conversations are directed to the right agents, improving response times and delivering more efficient, personalised support across your entire team.

Included for all users

Plan, Promote & Fill Your Events with Ease

Managing events can be time-consuming, but Act! Online Event Management automates registrations, reminders, and attendee tracking to help you maximise turnout.

✓ Create & sync events directly to your Act! calendar for real-time scheduling updates

✓ Publish a sign-up page and send automated confirmation emails & calendar invites

✓ Send automated reminders to boost attendance and engagement

Track, Manage & Follow Up Automatically

Ensure no lead is lost after an event—track RSVPs, categorise attendees, and trigger personalised follow-ups to turn participants into customers.

✓ Segment & categorise attendees to personalise post-event engagement

✓ Track RSVPs & attendance inside Act! for better event planning

✓ Send automated follow-up emails with surveys, event recordings, or appointment links

Online Event Management is included with an Act! Advantage subscription.

Act! Advantage Standard

Includes **Standard Online Event Management**

Create and publish online event sign-up pages that automatically add new contacts to Act!, organise sign-ups into groups, and link them to events with automated reminders and follow-ups to boost attendance.

Includes one designated user

Act! Advantage Professional & Ultimate

Includes **Advanced Online Event Management**

Everything in Standard, plus multi-user event management, drip email campaigns, and enhanced tools for seamless event coordination.

Included for all users

Keep Your Links Short & Professional

Long, complex URLs can look cluttered and unprofessional. With Act! URL Shortener, you can convert any link into a short, easy-to-share URL that works seamlessly across all platforms.

✓ Shorten long, cluttered URLs in one click

✓ Use branded, professional links across platforms such as Facebook or LinkedIn

✓ Eliminate confusing links for a seamless experience

Track Clicks & Optimise Engagement

Knowing where your traffic comes from helps you refine your marketing efforts. Act! URL Shortener provides detailed tracking so you can measure link performance and make data-driven decisions.

✓ Track clicks, referral sources, and devices

✓ Identify which campaigns drive the most traffic

✓ Improve targeting with real-time analytics

URL Shortener is included with an Act! Advantage subscription.

Act! Advantage Standard

Available with Act! Email Marketing Plus at £59/mo/account (25,000 total sends)

Act! Advantage Professional & Ultimate

Included