

Sage ACT! 2012 User Permissions by Feature or Function

Courtesy: On the verge, incorporated
<http://yourcrmteam.com>
 800-963-0433 | @yourcrmteam

Feature or Function	Admin.	Manager	Standard	Restricted	Browse
Accounting/back-office link					
Perform accounting link tasks	X	X(1)	X(1)		
Activities (including Calendars)					
Associate with groups, companies, opportunities	X	X	X	X	
Manage activity types, events, priorities	X	X			
Manage resources (Sage ACT! Premium)	X	X			
Schedule/edit/delete my activities	X	X	X	X	
Schedule/edit/delete activities for other users	X	X			
Synchronize my calendar with Outlook or Google	X	X	X	X	
Activity Series					
Add/edit activity series templates	X	X	X		
Delete my activity series templates	X	X	X(1)(3)		
Delete other users' activity series	X	X			
Schedule activity series	X	X	X	X	
Sage ACT! Scheduler					
Add/edit/delete database backup tasks	X	X(1)(2)	X(1)(2)		
Add/edit/delete database maintenance tasks	X	X(1)(2)	X(1)(2)		
Add/edit/delete database synchronization tasks	X	X	X		
View/purge the task log	X	X	X		
Communications					
Add/edit/delete word-processing templates	X	X	X		
Enable e-mail (includes using Outlook integration)	X	X	X	X	X
Enable word processing	X	X	X	X	
Transfer/restore an ACT! e-mail database	X	X	X	X	X
Companies					
Add/edit companies	X	X	X		
Associate with opportunities, activities	X	X	X	X	

1) User can be assigned this permission. (2) Permission applies to remote databases only.
 (3) Permission applies to Sage ACT! Premium only. (4) Permission is required for using Sage ACT! Connect.

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Delete my companies	X	X	X(3)		
Delete other users' companies	X	X			
Duplicate companies	X	X	X	X	
Link/unlink my contacts	X	X	X		
Link/unlink other users' contacts	X	X			
Manage my companies (change Record Manager; change record access)	X	X	X		
Manage other users' companies (change Record Manager)	X	X			
Contacts					
Add/edit contacts	X	X	X	X	
Add/edit/promote secondary contacts	X	X	X	X	
Attach Web pages	X	X	X	X	
Delete my contacts (including secondary contacts)	X	X	X(3)		
Delete other users' contacts	X	X			
Duplicate contacts	X	X	X	X	
Manage my contacts record access	X	X	X	X	
Manage other users' contacts (change Record Manager; change record access)	X	X			
Synchronize my contacts with Outlook or Google	X	X	X	X	
Conversion/Upgrade					
Convert ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) databases	X				
Convert ACT! 3.x, 4.x, 5.x (2000), or 6.x (2004) supplemental files	X	X			
or Sage ACT! 2011 databases	X	X			
Customization					
Customize columns in list views and tabs	X	X	X	X	X
Customize layouts	X	X			
Customize menus and toolbars	X	X	X		
Customize Navbar	X	X	X	X	X
Dashboard					

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Feature or Function	Admin.	Manager	Standard	Restricted	Browse
Add/edit/delete Dashboards	X	X			
Filter data in components	X	X	X	X	X
View/select Dashboards	X	X	X	X	X
Data Exchange					
Export data (includes product lists and drop-down lists)	X	X			
Export to Excel (list views only)	X	X	X(1)(3)		
Import data (includes product lists and drop-down lists)	X	X			
Database Management/Maintenance					
Back up databases	X	X	X(1)(2)		
Back up personal files	X	X	X	X	X
Copy databases	X	X			
Copy/move contact data	X	X	X(2)		
Create databases	X	X	X	X	X
Define fields	X	X			
Delete databases	X				
Lock databases	X	X	X(1)(2)		
Manage Sage ACT! serial numbers	X				
Move databases	X				
Perform check and repair	X	X(1)(2)	X(1)(2)		
Perform remote administration	X	X(1)(2)	X(1)(2)		
Remove old data	X				
Restore personal files	X	X	X	X	X
Restore databases	X	X(1)(2)	X(1)(2)		
Run Sage ACT! Update (not all users can update the database schema)	X	X	X	X	X
Scan for duplicate contacts	X	X	X	X	X
Set and maintain password policy	X				
Share databases	X				

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Update the database schema	X	X			
Groups					
Add/edit groups	X	X	X		
Delete my groups	X	X	X(3)		
Delete other users' groups	X	X			
Duplicate groups	X	X	X		
Manage my groups record access	X	X	X		
Manage other users' groups (change Record Manager and control user access)	X	X			
Histories					
Add/edit histories	X	X	X	X	
Change record access for my histories	X	X	X	X	
Delete my histories	X	X	X(3)		
Manage other users' histories (change Record Manager; change record access)	X	X			
Set preference for editing histories	X	X			
Share histories with groups and companies	X	X	X	X	
Integrate Sage ACT! with other applications					
Record history from Gmail messages	X	X	X	X	
Set up Google integration	X	X	X	X	
Set up Outlook contacts/calendar synchronization	X	X	X	X	
Internet Services (ACT! Links)					
Use ACT! Links	X	X	X	X	X
Lookups, search, and queries					
Add/edit/delete queries	X	X	X	X	X
Perform lookups/keyword search	X	X	X	X	X
Save lookup as company	X	X	X		
Save lookup as group	X	X	X		
Search in Sage ACT!	X	X	X	X	X

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Notes					
Add/edit/delete notes	X	X	X	X	
Change record access for my notes	X	X	X	X	
Manage other users' notes (change Record Manager; change record access)	X	X			
Set preference for editing notes	X	X			
Share notes with groups and companies	X	X			
Opportunities					
Associate contacts, groups, and companies	X	X	X	X	
Create/edit opportunities	X	X	X	X	
Create opportunity graphs and pipelines	X	X	X	X	X
Delete my opportunities	X	X	X(1)		
Delete other users' opportunities	X	X			
Duplicate opportunities	X	X	X	X	
Manage my opportunities record access	X	X	X	X	
Manage opportunity processes and products	X	X			
Manage other users' opportunities (change Record Manager; change record access)	X	X			
Preferences					
Manage Admin preferences	X	X			
Manage user preferences	X	X	X	X	X
Manage database preferences	X	X	X		
Printing					
Print calendars, address books, and contact, company, and group information	X	X	X	X	X
Reporting					
Create/edit/delete reports	X	X	X		
Run reports	X	X	X	X	X
Smart Tasks					
Create/edit Smart Tasks templates	X	X	X		

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Delete my Smart Tasks templates	X	X	X(1)		
Delete other users' Smart Tasks templates	X	X			
Run Smart Tasks	X	X	X	X	
Synchronization of Databases					
Change remote sync status (disable/suspend)	X	X			
Change expiration period	X	X			
Create/delete/re-create remote databases	X	X			
Create/edit/delete Sync Sets	X	X			
Enable synchronization (main database only)	X	X			
Initiate synchronization (remote database only)	X	X	X		
Manage database locations	X	X(2)			
Manage Subscription List	X	X(1)(2)(4)	X(1)(2)(4)		
Manage synchronization set-up (main database)	X	X			
Perform handheld device sync	X	X(1)(4)	X(1)(4)		
Print synchronization settings	X	X	X		
Recreate remote databases	X	X			
User Management					
Manage teams (Sage ACT! Premium)	X	X			
Manage users	X				

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