



# Insurance

## #1 Best-Selling Contact & Customer Manager



### Get it together

Think of Act! as your business 'command center,' giving you control to quickly tap into all relationship details, seamlessly interact with productivity and tools you rely on every day, and take the guesswork out of when, where, and how to engage with prospects and customers – all from within Act!.

<b>CONTACT</b>	<b>MAILING ADDRESS</b>	<b>STATUS</b>
Contact Name	Address 1	ID/Status
Salutation	Address 2	Referred By
Phone	City	<b>CONTACT METHOD</b>
Mobile	State/ZIP	Best Method
Alt. Phone	Country	Best Time
Home Phone	<b>COMPANY</b>	<b>WATCH LIST</b>
Fax	Company	File Review Date
E-mail	Title	Days Since
Birth Date	Department	Days Until Policy Renewal Date
SSN	Web Site	Medical
Marital Status	Insurance for ACT!	Dental
		Vision
		Life
		Disability
		LTC
		Record Manager

<b>MEDICAL</b>	<b>DENTAL</b>	<b>VISION</b>
Carrier Name	Carrier Name	Carrier Name
Plan Name	Plan Name	Plan Name
Policy Number	Policy Number	Policy Number
Premium/Modal	Premium/Modal	Premium/Modal
Deductible	Deductible	Deductible
Effective Date	Effective Date	Effective Date
Renewal Date	Renewal Date	Renewal Date
Term Date	Term Date	Term Date

### Act!'s Great Features Plus

- Know every detail about your agency contacts and participation.
- Track commercial, P&C, health and other policy types and dates for effective/renewal/term.
- Calculates days until policy renewal dates.
- Default groups to track policy renewals within 60 days and past due renewals.
- Use companies to track employer participation including carriers and plans.
- Stay connected with Windows®, Web, Mobile, and Hosted options available!



### Still the one

Act! is the #1 best-selling Contact & Customer Manager, trusted by individuals, businesses, and teams for over 30 years, because it's affordable, easy to use and purpose-built to meet your unique, evolving needs. Act! helps organize all your prospect and customer details in one place and market your products and services more effectively, driving results while creating customers for life.

*Act! Subscriptions or Licenses are Bundled or Sold Separately*

