



## Listen to your ACT! Guru

### New Opportunity and Reporting Features in ACT! by Sage 2010

If you have been waiting for ACT! Opportunity tracking and reporting functionality to improve, ACT! 2010 is the release for you! In addition to Opportunities now being fully customizable<sup>1</sup>, we also have several new reporting features in this release that make ACT! reporting more robust and easier to use. The Opportunity and reporting enhancements new to ACT! 2010 are:

- Completely customizable<sup>2</sup> Opportunities
- A new OleDb provider
- New stock reports
- A new report view
- New Dashboard components

Many of you have told us that you couldn't find the reports you needed in ACT! or that when you did find it, it wasn't named what you thought it should have been named. We took this feedback to heart in ACT! 2010 and made several changes that will help to streamline your ACT! reporting experience.

#### **Completely Customizable<sup>3</sup> Opportunities**

In ACT! 2010, Opportunities are fully customizable and have many new features, like the ability to associated activities, documents and notes to them. Now, Opportunities will behave more like Contacts or Companies, giving you more flexibility and control over your pipeline. And, being able to customize Opportunities means you can tailor them to fit your selling model. Look for more details about the new and improved Opportunities in ACT! 2010 in the Fall edition of eNews.

#### **A New OleDb Provider**

In ACT! 2010, we have created a new OleDb provider, OleDb2.0. An OleDb (Object Linking and Embedding Database) is an API designed by Microsoft® for accessing different types of data stored in a uniform manner. ACT! users can utilize this tool with other reporting products like Crystal Reports®, Microsoft Access or Microsoft Excel® to create reports from ACT! data.

ACT! has included this tool in previous releases, but in the ACT! 2010 release, a number of changes have been made to provide more data and make the feature easier to use. For details on the changes to this feature, please reference the ACT! technology corner article in this version of eNews.

#### **New Reports**

Because the enhancements to Opportunities provide such powerful new features, we've added thirteen new stock reports to help analyze them. You can report on your won Opportunities by closing month, see what Opportunities are scheduled to close by looking at your Opportunities by estimated closing month, and much more.

With these new reports, you can more fully analyze your Opportunities to determine what processes are most effective for closing deals in your organization. To see these new reports, simply navigate to the report view in ACT! 2010.

#### **New Report View**

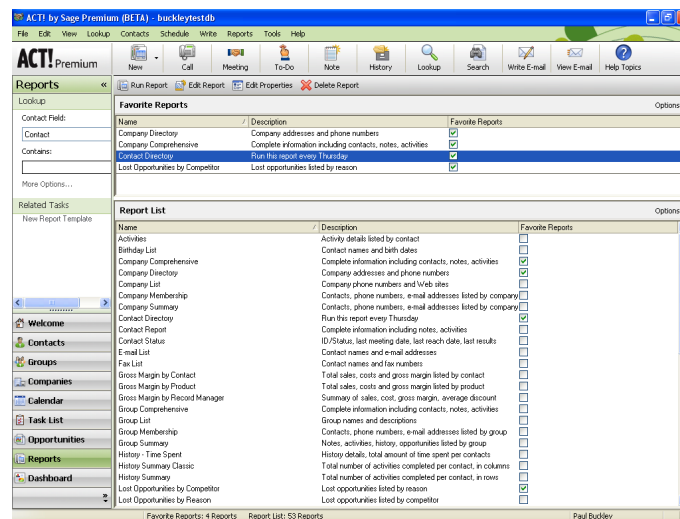
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<sup>1</sup> Sage does not provide technical support for customizations.

<sup>2</sup> Sage does not provide technical support for customizations.

<sup>3</sup> Sage does not provide technical support for customizations.

ACT! 2010 includes a Report view. This is a new view for ACT! that will help you organize your reports and provide an easy access point for them. If you have ever had trouble finding the right report in ACT!, you're going to love this new view!



In this new view, you can see all the reports contained in ACT! including a description of each report. If the description doesn't suit your needs, or you have modified the description, you can easily change the description to something that makes more sense to you by clicking the Edit Properties button at the top of the screen. You can also run or change the reports from this view. To run the report, you can double-click it or select Run Report from the top of the screen. To edit it, click Edit Report.

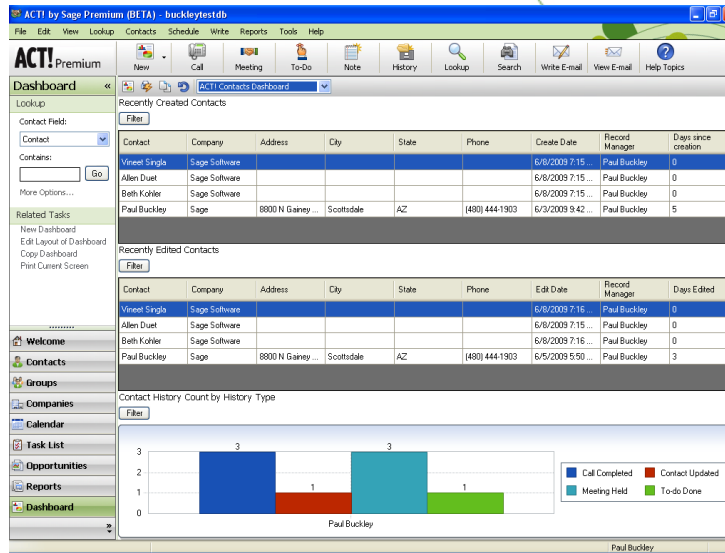
Many ACT! users do not use all of the reports in ACT!, but instead, regularly rely on a smaller selection of the reports to fulfill their analysis needs. For easy access to the reports you run frequently, you can select any of the reports in the view as *Favorites* by selecting the Favorite Report check-box in the Report View. This will move your favorites to the top of the screen for easy access.

This view not only gives you a comprehensive view of your reports, but also helps you organize them in a way that makes the most sense to you.

### New Dashboard Components

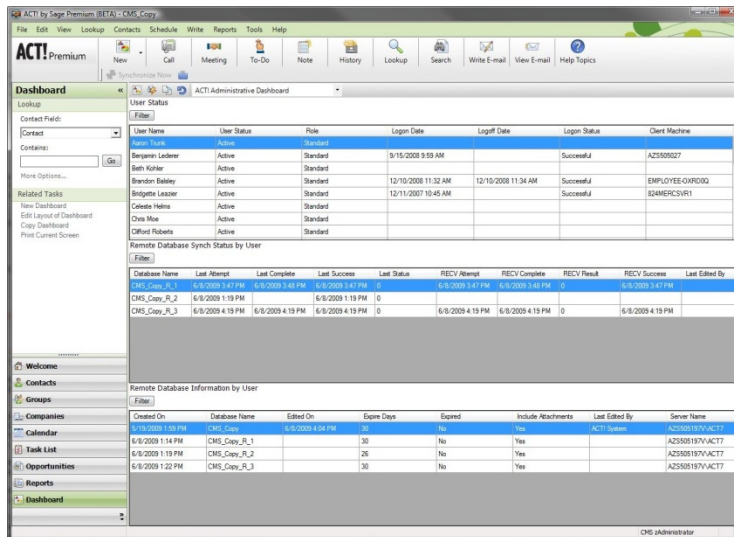
To complete the picture for reporting enhancements in ACT! 2010, we have also included several new dashboard components and two new default dashboards:

- ACT! Contact Dashboard
- ACT! Administrative Dashboard



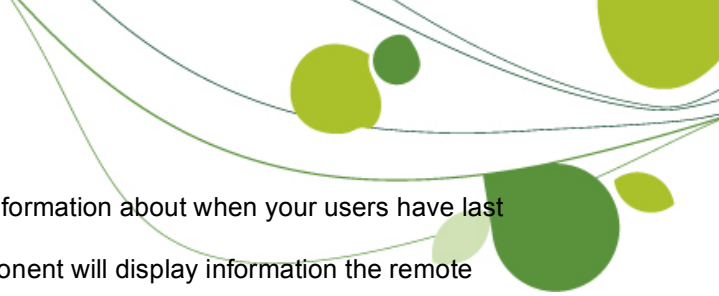
The ACT! Contact Dashboard will show you information relevant to the contacts in your database. In this new default dashboard, you will see the following:

1. **Recently Created Contacts:** This dashboard component will show you the most recently created contacts in your database. This currently defaults to contacts that were created within the last 30 days, but to change that default date range, just click the Filter button on the chart.
2. **Recently Edited Contacts:** This dashboard component will display the Contacts that have been modified within the last 30 days. To change this date range, click the Filter button on the chart.
3. **Contact History Count by History Type:** This component will show the contact histories that have been logged by history type. This frequently-requested dashboard component will display Contact history count types by user. To modify which users display, simply click the Filter button.



For ACT! administrators, this new dashboard is a powerful tool to keep up with user and remote database activity. Included in this dashboard component are:

1. **User Status:** This dashboard component will let you know if your users are currently logged in or out and when the last time they logged in was.

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2. **Sync Status by User:** This component will display information about when your users have last synched their remote database.
  3. **Remote Database Information by User:** This component will display information the remote databases associated with the main database.

Several more Dashboards are available with this new component. To explore all of the options now available in dashboards, go to the Dashboard view, create a new Dashboard and drag the Data Chart component onto the dashboard designer. To explore all the options available to you, use the drop-down to select the new charts.

These new ACT! 2010 Opportunity and Reporting features provide key insight to the information you need to more effectively manage your pipeline and administer your database—so you can better use the information you store in ACT! to make more informed business decisions.

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