Sage ACT! 2011 Dashboard and Report Cookbook

Karen Fedricks, Roy Laudenslager

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Take your Customer Relations Management to new levels of efficiency with the 65+ recipes in this indispensable Cookbook. You'll be creating and customizing superb dashboards and reports from your Sage ACT! data in no time.

Overview

- Immediately access and fully understand the out-of-the-box ACT! reports and dashboards
- Get to grips with filtering dashboard information
- Customize existing reports and dashboards to make permanent changes
- Create brand-new reports using the ACT! Report Writer

What you will learn from this book

- Navigate and explore the ACT! report templates
- Take advantage of all the components on the dashboard for manipulating data and measuring the productivity of your sales force
- Get up and running with various ACT! dashboards such as the Activities Dashboard, Opportunities Dashboard, and Administrative Dashboard
- Understand the full capabilities of the Report Designer so that you know what can and can't be done
- Enhance report templates with program scripts
- Edit existing ACT! dashboards to include the information that you need to see
- React to your data quickly and efficiently by filtering dashboard information
- Drill down on dashboard information to view more detail or to edit your data
- Copy dashboards into other projects such as PowerPoint presentations
- Master the use of various report filters
- Fully utilize the range of ACT! Quick Reports
- Gain the skills to access your favorite reports quickly

Approach

This is a cookbook of easy-to-follow recipes about ACT! 2011 dashboard and report practices.

Who this book is written for

If you are an ACT! end user who wants to learn about the existing reports and dashboards available in ACT! 2009, 2010, and 2011, then this book is for you. If you are an ACT! administrator who wants to make changes to ACT!'s dashboard and reporting features or a sales manager who needs to measure the effectiveness of his sales force, you will also find this book helpful. New CRM users will learn how to measure the success of their database. Prior knowledge of ACT! is not essential; however, you'll find it helpful to have good working knowledge of how to add data to ACT!, or to work with an ACT! database that has already been populated with data.

In Detail

Sage ACT! is the top selling CRM software application, and it helps businesses to centralize contact information, organize their calendars and notes, and ultimately maximize contact relationships to optimize business efficiency and profitability. In ACT! 2011, a variety of new dashboards and reports are available for producing graphical representations of client information and for measuring the success of your sales force.

This cookbook is full of practical and immediately applicable recipes that will take you from being an ACT! report and dashboard novice to a report-writing pro in no time. The recipes will show you how to create custom dashboards and reports, as well as utilize the new templates available in recent ACT! versions. You will learn to use ACT!'s Report Editor and Dashboard Designer so that you will be able to easily view important information about your business and your sales force.

The recipes begin by covering the most basic elements of the ACT! reports and continue to include several recipes that will guide you through creating brand-new reports. If you have an ACT! database, you need to be able to access it quickly and logically; this book will help you do just that..

Take full advantage of the new dashboard and reporting capabilities of this popular CRM solution to transform and present this popular CRM solution your ACT! data to make business decisions at a glance.

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