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### Headline News

In late 2006, Sage Software discontinued support for ACT! 2004 (Version 6.0). Now the only officially supported versions are ACT! 2007, ACT! 2006, and ACT! 2005.

If you are running a non-current non-supported version of ACT!, call us to find out the advantages of upgrading to ACT! 2007.



## Tips And Tricks—Hidden Gems In ACT! by Sage

**A**CT! by Sage is full of powerful functionality and integrated features. Here we will look at some hidden gems in ACT! that could increase your efficiency and save you time.

### Maps And Directions

If you've used one of the Internet mapping services, you know how convenient it is to type in the destination address to see a map of the location, and if you include your originating address you can receive detailed driving instructions.

This same capability is built into ACT!, and what's more, you don't have to type in an address or copy and paste information.

With the Contact active in ACT!, select *View>Internet Services>Internet Links*, then select either *MapQuest Driving Directions* or *MapQuest Maps*. When you select the Driving Directions option, the program will use the address from the My Record data as the originating address. When you select the MapQuest Maps option you'll get a map of the Contact location. It's quick, it's easy, and it's available from within ACT!.

### How's The Weather?

This tip helps you deliver personalized service to your customers. Before your next phone call, brush up on the current weather conditions in your contact's city. You can do it without ever leaving ACT!.

Select *View>Internet Services>Internet Links>Yahoo! Weather*. Instantly, you will receive



the current weather conditions in the Contact's city, along with a five-day forecast. Just think how handy this feature could be for your traveling sales staff!

### Mini-calendar

By pressing F4, you bring up the Mini-calendar feature from anywhere in ACT!.

Most of us live or die by our calendar—we're busy, and it seems we get busier every day. When performing many of our tasks within ACT!, it's sometimes useful to have a calendar. Did you know that while you are within ACT! you can bring up a three-month Mini-calendar simply by pressing the F4 key. The Mini-calendar will display the dates with calendar events in bold. You can click on a day within the Mini-calendar and ACT! will launch the Calendar view featuring the date you selected.

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## Tips And Tricks — Hidden Gems In ACT! by Sage CONTINUED

### ACT! Timer Window

By pressing the *Shift* and *F4* keys, together, the small ACT! Timer window will open. The timer has start, stop, and pause buttons. You can use this to time the length of a phone call with a Contact and record this information in ACT!.

You also can use the ACT! Timer to remind yourself that you promised to call your customer back in five minutes, or that in fif-

teen minutes you must report to a meeting. Certainly you could create an appointment with a reminder—but for simple informal uses, the ACT! Timer is standing by.

### Attach An E-mail

When you receive an e-mail in Microsoft Outlook that you would like to attach to one or more ACT! Contact records, simply press the *Attach to ACT! Contact(s)* icon (it looks like a

handshake) from the Outlook toolbar. Verify the contact is in the *Attach these Contacts* box or type in the name and press the button to add your contact, once your list is complete click OK. The e-mail is now attached to the contact's history record.

Call us with any questions or to find out how to get the most out of ACT! by Sage. ☆

## TopLine Dash Manager — Your Top Source For The Bottom Line

One benefit of using ACT! by Sage is its ability to serve as a centralized database, a single place to store and retrieve all your contact management information. Building on that benefit is an add-on solution for ACT! from TopLine Results Corporation: **TopLine Dash Manager**.

With TopLine Dash Manager you can assemble panels of the data you care about, and place those panels in a single dashboard-style screen where you can view and analyze your ACT! data. Let's learn more.

### TopLine Dash Manager

TopLine Dash Manager is a customizable, interactive dashboard designed to work with your ACT! data such as Contacts, Opportunities, Activities, Notes, or History in the graphical dashboard views. Using the interactive TopLine Dash Manager tool, you can click on your ACT! Contacts, Activities, or Notes to edit or add data. You can select from the many included dashboard templates and easily customize them to show you precisely the ACT! data you need. Each dashboard consists of one or more panels of data. By combining panels you can efficiently view all of the ACT! data most important to you in one organized and convenient location.

### Interactive Dashboards

You may build an unlimited number of dashboards, and each dashboard can contain up to 25 panels. Your panels can contain your own data, or depending on the version of ACT! you are running, you can include other users' data as well. Any ACT! database field can be added to

your views. You can include contact details, calendars, opportunities, histories, products, and more—all on a single screen if you choose.

Because you can build as many dashboards as you like, you could, for example, have one dashboard containing sales-related data, another containing your personal calendar and tasks, and a third with your team's calendar.



The Activity List view is one of the many dashboard templates available with TopLine Dash Manager.

When you open the TopLine Dash Manager, the various dashboards you have created appear as tabs, making it easy to select and switch between them. It's easy to change the look of your dashboard—simply drag and drop panels to rearrange them to display the data in the order you prefer.

### Included Templates

How can you put TopLine Dash Manager to work for you? Just to give you an idea, here are a few of the many dashboard templates included with TopLine Dash Manager.

**Sales Metrics:** Sales representatives will like this view; it shows meetings in one panel, a bar chart panel showing opportunities and their potential

value, and a third panel providing the contact details of a meeting event you highlight.

**Team Activities & Pipeline:** This template is a great tool for Sales Managers. One panel shows a bar chart of sale and service activities for the whole team, color coded by stage. A second panel displays a pie chart of your opportunity pipeline by the stage. And the third panel shows the follow-up activities assigned to your team.

**Key Performance Indicators:** This dashboard gives you detailed metrics for each salesperson listing how many calls, meetings, to-dos, quotes, and e-mails they have scheduled and completed.

**Calendar/Contact Detail View:** In this view you can see the calendars for each member of your team—side by side for easy comparison. It also includes a panel for viewing contact details.

### ACT! Data At Your Fingertips

TopLine Dash Manager gives you a convenient way to organize and analyze your ACT! data. You're not staring at a static report, but a dynamic, interactive presentation of your data. Essentially whatever you can do with the data within ACT! is possible from TopLine Dash Manager.

If you refer to a particular panel throughout the day, you can turn it into a floating panel, and make it available while you work within ACT! or even in another program.

### An Edition For You

There are different editions of TopLine Dash Manager, call us to help select the best edition to meet your needs. ☆