Effective Solutions

One Click KPI Toolbar for ACT! 2007

MAKE ACT! EVEN EASIER

Make the data entry of KPI's simple for your ACT! Users

Build Click-Intensive processes into easy to use buttons on a toolbar in ACT!

Build several actions into a single toolbar button

You can build multiple toolbars, one for each department

Quickly update Opportunity Sales Stages with a single button

Add Lookup Buttons to the toolbar for easy access to key data

Get more from your 3rd Party reporting tools like Stonefield, Crystal Clear Essentials and Topline Dash

Toolbar configuration changes synchronize out to your remote users!

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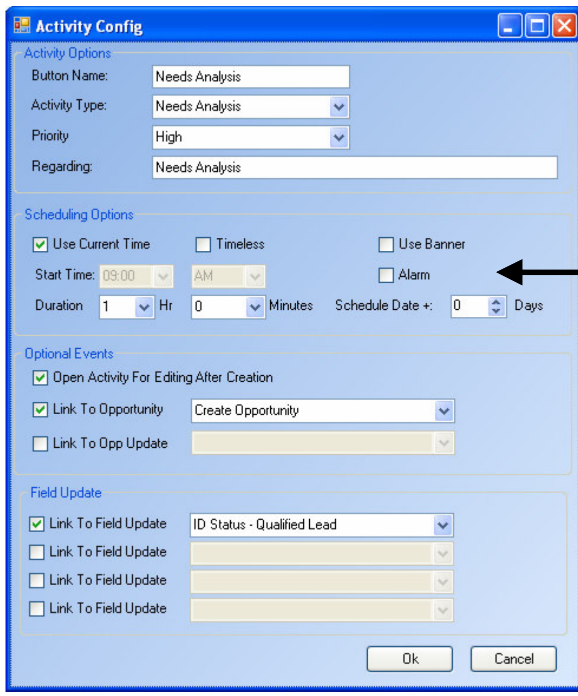
AUTOMATE AND TRACK KEY SALES ACTIVITIES

The One-Click KPI Toolbar allows you to take click-intensive activities in ACT! and build them into toolbar buttons in ACT!. With a single click you will be able to create history items, activities, update fields, create opportunities, etc. You are limited only by the creativity of your sales process and KPI tracking.

This tool is a perfect fit for business that want to track KPI's (Key Performance Indicators), and struggle with data entry because there are too many steps for the sales force to remember.

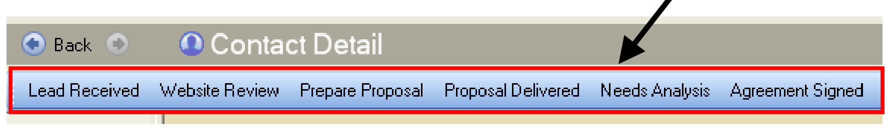


1 Use the One-Click KPI Toolbar configuration tool to configure buttons like this one. Note all of the options you can build into a single button.

All updates are distributed out to network and sync users.

2 Once you save your configuration, the toolbar will show up in ACT!

Simply click the buttons to make things happen!



3 Run Weekly and Monthly KPI Reports using 3rd Party tools like Stonefield Query, Crystal Clear Essentials and Topline Dash.

Record Manager	Agreement Signed	Lead Received	Needs Analysis	Proposal	Website Review
Don Grubor	1	1	1	1	1
Totals:	1	1	1	1	1

Patent Pending

Doc Update: 5/21/07

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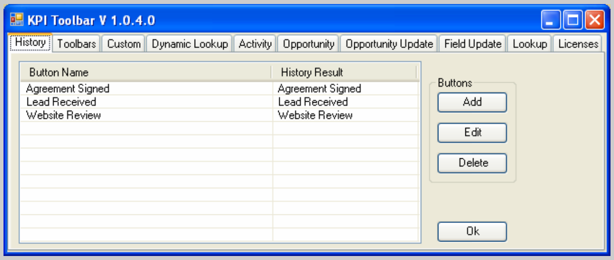
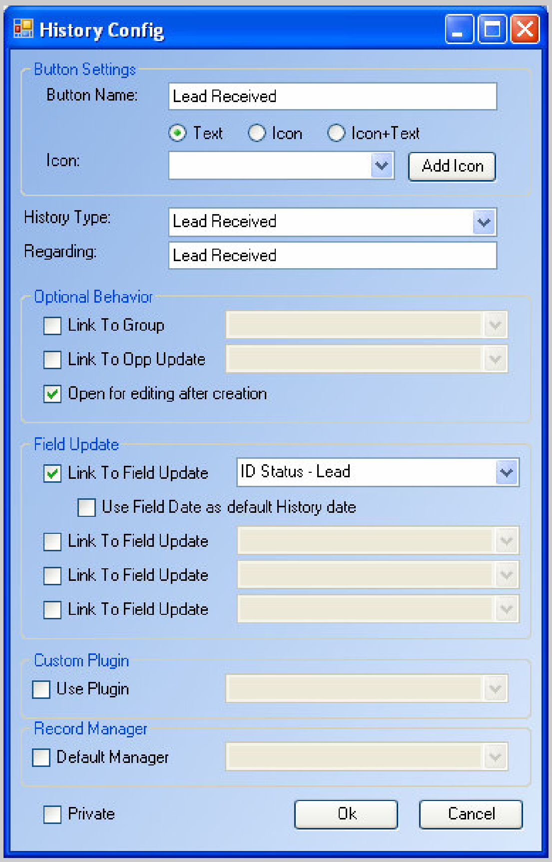
Easy to Use
Button Configuration Tool





PRODUCT PRICING:

1 to 9 Licenses = $49 each

10 to 24 Licenses = $46 each

25 to 49 Licenses = $43 each

50 Licenses and higher = $40 each

Licenses are assigned to ACT userids. Purchase a license for each ACT user that you would like to use the Toolbar.

PRODUCT FEATURES

Configuration is flexible and easy: Perform all of your toolbar customization on the main database, either from the server, or from a network connected workstation. Load the toolbar utility on each client and the configuration changes will be distributed out to both network and sync users.

Multiple Toolbars and Button Order: The One-Click KPI Toolbar allows you to create multiple toolbars, and determine which buttons appear on each toolbar. You can create a separate toolbar for each functional area.

Automate History Creation: Setup a button to automatically create a history item with the appropriate Activity Type and Result for the current contact. Choose whether to be prompted for details.

Automate Activity Creation: Setup a button to automatically create an activity with the appropriate Activity Type for the current contact, and choose whether to pop up the activity window before saving.

Automate Opportunity Creation: Setup a button to automatically create an opportunity, preset field values, and pull fields from the Contact and Company record into the Opportunity User Fields and Referred By fields. All that users will have to do is fill out the Product tab information.

Automate Opportunity Stage Updates: Setup a button to automatically update the stage of a sales opportunity for the current contact. You can also setup the button to change the status of the Opportunity to Won/Lost/Inactive. If there are multiple opportunities, you will be prompted for the correct one to update. You can also link in field updates (ID/Status) to the button functionality.

Automate Field Updates: Setup a button or an action to update a field to a particular value or to be prompted for a value. These Field Updates are very often linked to other activity buttons. For example, when an opportunity is marked WON, the ID/Status should be set to Customer. This can be built into a single button with the KPI Toolbar.

Automate Lookups: Build a query in ACT!, and link the query file to a button on the KPI Toolbar. Works great for users that run repetitive lookups.

Dynamic Lookup: Build a button on the Toolbar that lets you quickly lookup a field, like Record Manager. Great for commonly used pull-down fields.

Licensing: The One-Click KPI Toolbar is licensed by the number of users that will need to see the toolbar on their ACT screen. Purchase the correct number of licenses and then assign licenses to your ACT users. Load the KPI Toolbar software on their machine and the toolbar will magically appear.

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