Effective Solutions

OneClick KPI Toolbar for ACT! 2007

# User Manual


Developed By:
Effective Solutions
13160 W. Burleigh Rd.
Brookfield, WI 53005

414-525-2975
sales@effsolutions.com
www.effsolutions.com


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# Installation Overview

### Best Practices for installing and configuring the One-Click KPI Toolbar

1. Work with you customer to map out the functionality of each button. The One-Click KPI Toolbar will let you have multiple toolbars that can be assigned to different individuals. You may need to map out what buttons will appear on what toolbars. Here is an example:

| BUTTON NAME | DESCRIPTION OF BUTTON FUNCTIONALITY | Toolbar |
|---|---|---|
| **Website Critique** | Create history item with Website Critique result and update the Website Critique date with the current date | Sales |
| **Lead Received** | Create history item with Lead Received result and prompt to enter in details | Sales |
| **Needs Analysis** | Pop up an Activity Dialog box with type set to Needs Analysis<br>User will enter in Date and Time of the meeting<br>Pop up New Sales Opportunity Dialog box for user to enter in Product info<br>Default Forecasted Close Date to 60 days<br>Copy Industry, Annual Revenues, Number of Employees and Website Critique from Contact Fields | Sales |
| **Proposal/Quote** | Create History item with Proposal/Quote delivered, update stage of current sales Opportunity to "Proposal Delivered" | Sales |
| **Contract Signed** | Create History item with Contract Signed result and mark Opportunity Closed/Won | Sales |
| **Customer Issue** | Create History item with Customer Issue result | Cust Svc |
| **Warranty Call** | Create History item with Warranty Issue result | Cust Svc |

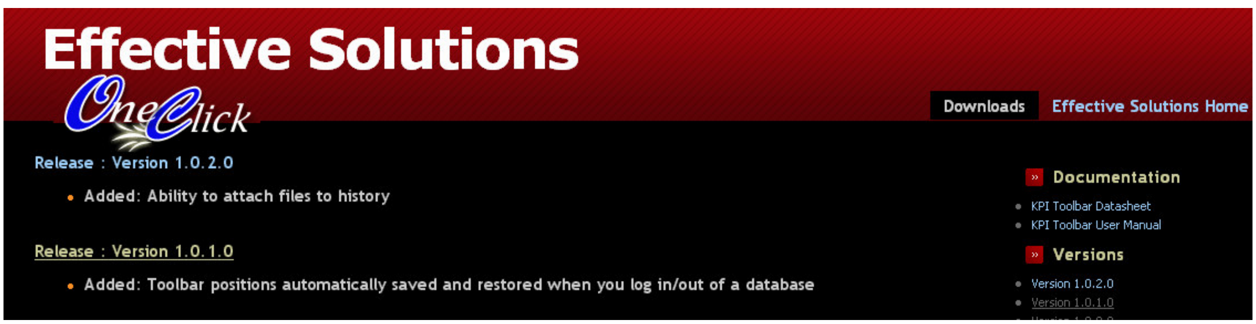
2. Create the appropriate custom activity types and results in ACT to allow for specific KPI reporting and tracking. Note: Be very careful when creating custom activity types and results in ACT. ACT has issues with changing or renaming custom activities and results.
3. Load the One-Click KPI Toolbar software on a machine that has direct access to the main database. Note, you will need to be an Administrator in the ACT database in order to customize the toolbar. You can download from http://effsolutions.no-ip.org/KPI/
4. Once installed, you can customize the toolbar from within ACT by going to TOOLS > KPI CONFIG. This user manual will go through examples of formatting the different styles of buttons.
5. Follow the instructions in the Licensing section of this document to get the KPI Toolbar product licensed.
6. Once the toolbar is configured to meet your needs, go to every other ACT workstation that needs the toolbar to display and install the One-Click KPI Toolbar software. You will not need to license it on each workstation, the product is licensed at the server.
7. Remember that all configuration options are stored within the database, so they sync out to remote databases.
8. That is it! Any future changes get made to the main database and then sync out to remote databases.

# Installing the One-Click KPI Toolbar Software

1. Close out of ACT on the workstation you want to install the utility on.
2. Go to http://effsolutions.no-ip.org/KPI/ to download the software. This page will have a history of product updates. Download the most recent version of the One-Click KPI Toolbar.
3. Choose RUN when prompted to run the installation process. Hit NEXT until the utility is installed.
4. The product is now installed. If you open up ACT, you will see a KPI Config option on the TOOLS menu.
5. If you are loading the client software on a computer where the main database already has a configured KPI Toolbar, the toolbar will automatically appear when you open up ACT.

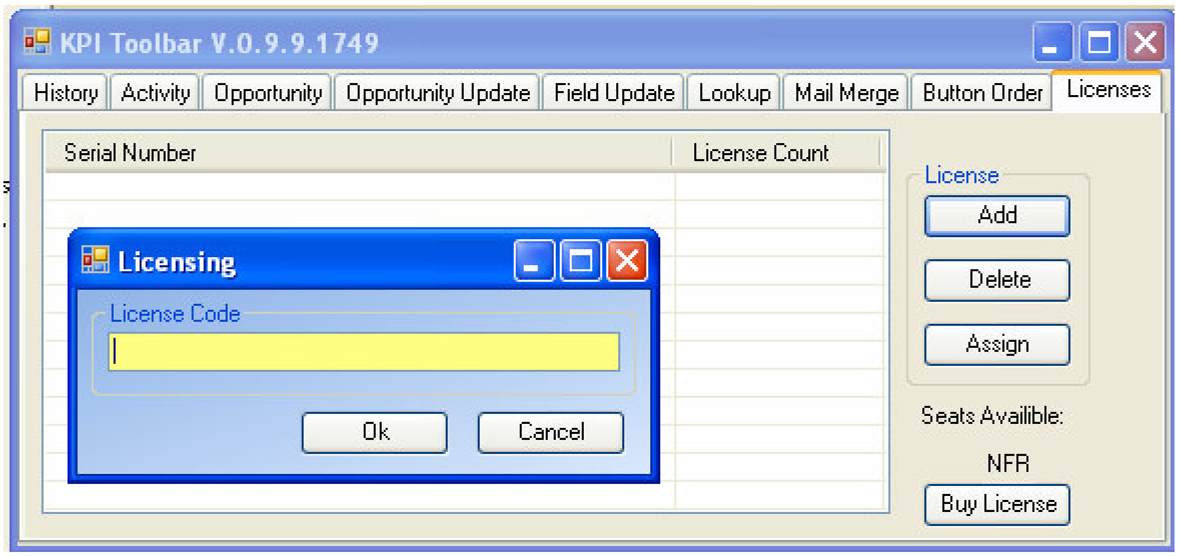
# Checking for Updates of the One-Click KPI Toolbar

1. From within ACT, go to Tools > Update KPI Toolbar
2. A browser window will open up to the KPI Toolbar landing page. It will display the most recent version, for you to download, as well as giving you access to the product datasheet and user manual.



# Purchasing Licenses and Registering your One-Click KPI Toolbar Implementation

1. Go to TOOLS > KPI CONFIG from within ACT.
2. Go to the Licenses Tab of the product.
3. Click on the BUY NOW button to purchase licenses. You will need an Internet connection in order to purchase using this button. **If you are a Reseller of our Product, you will want to follow the specific Reseller instructions provided to you in order to purchase licenses.**
4. With either method listed above, you will eventually obtain a license number that will consist of the number of licenses purchased. Click on the ADD button on the license tab in order to paste your license number into the KPI Toolbar product.

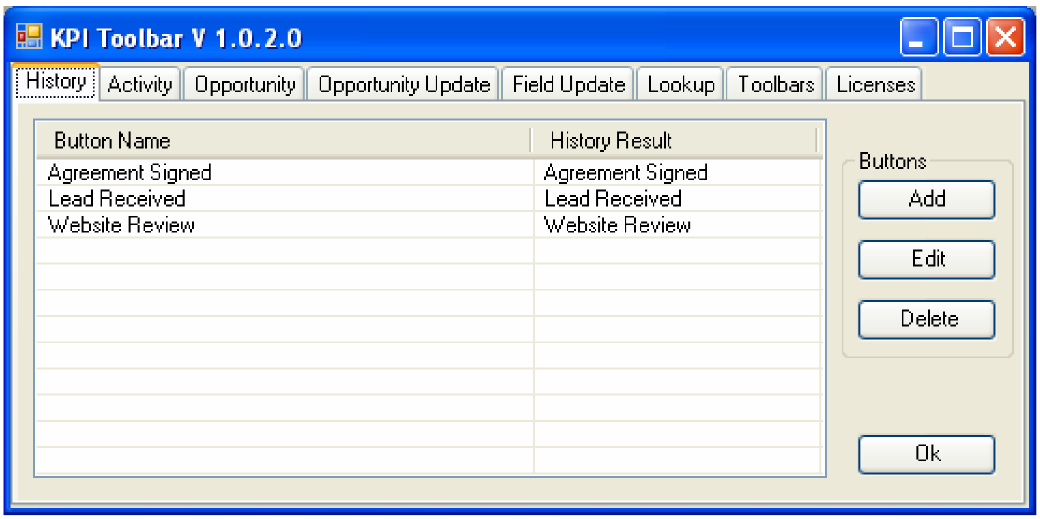



5. Once the license is applied, you will want to click on the ASSIGN button to assign the licenses to the appropriate ACT users. You will be given a list of the current ACT users.

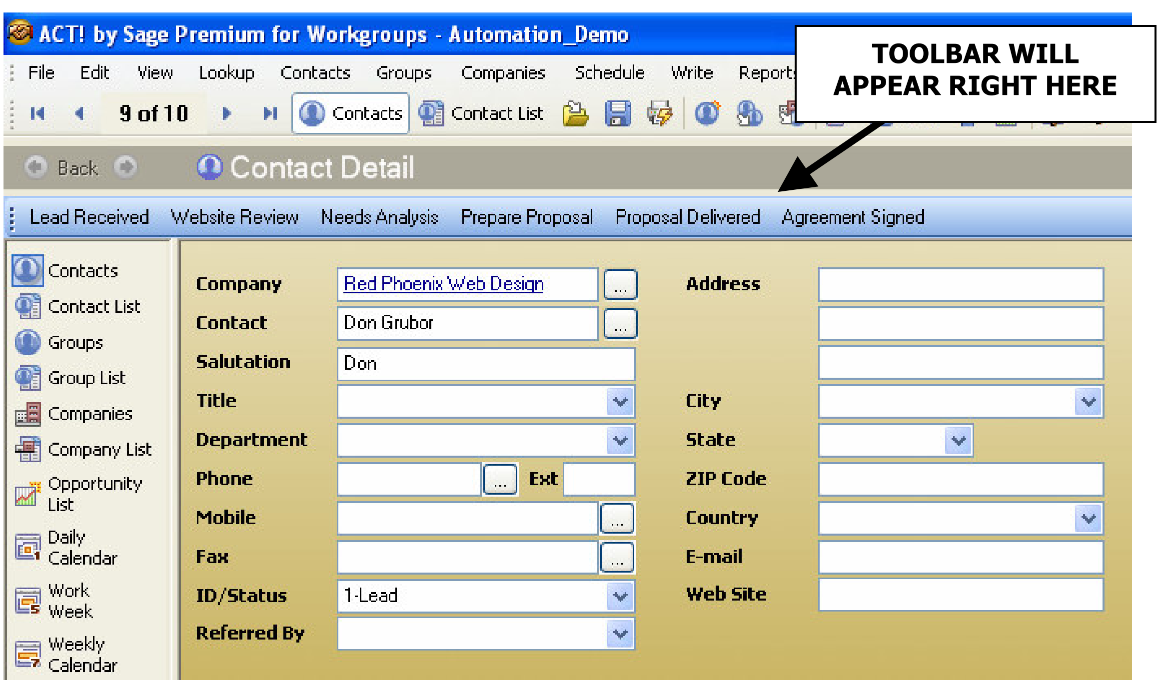
# Configuring the One-Click KPI Toolbar

To access the One-Click KPI Toolbar Configuration Utility you must have Administrator security in ACT and you need to be connected directly to the main database. **You can not make configuration changes from a Remote database.**

To access the configuration utility, from ACT go to TOOLS > KPI CONFIG. You will get the following window, with tabs separating each type of button configuration.

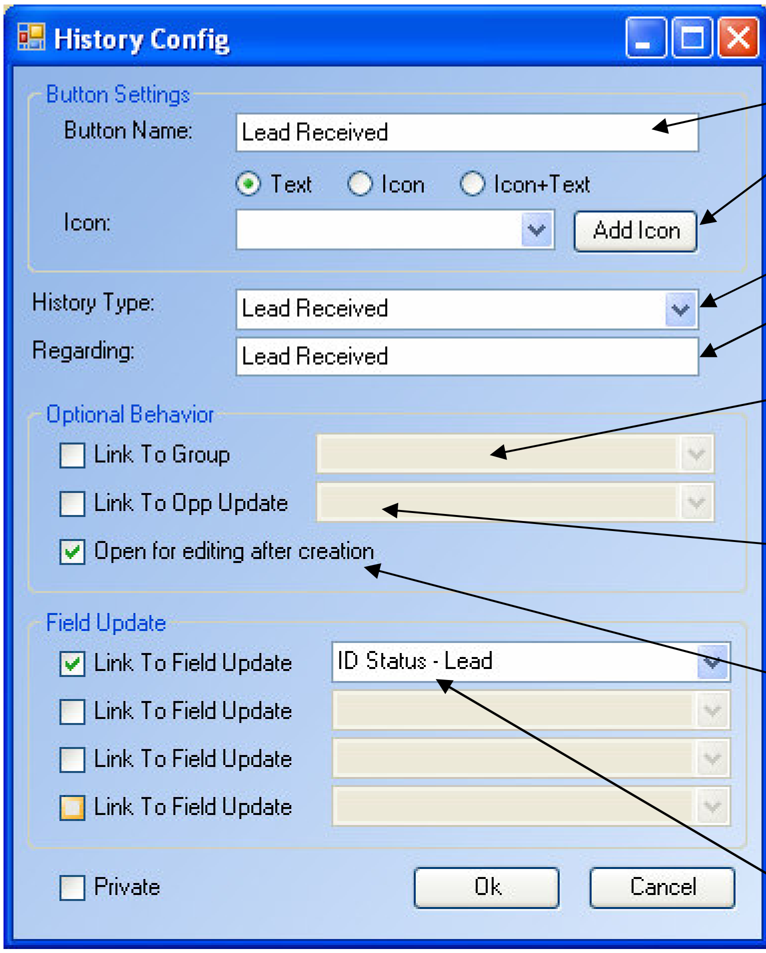



You can think of the One-Click KPI Toolbar as a series of Macros that get initiated with the click on a Toolbar Button. One Toolbar Button can be linked to several macros, so that several actions can be initiated with the click of a button.



## *History Configuration Tab*

You can configure a KPI Toolbar Button to automatically create a history item for the current contact in ACT, plus link to other predefined actions.  Let's take a look at the options available:




Give the button a name as you want it to appear on the Toolbar, and you can also assign an icon if you choose.

Specify the History Type you would like to create.  If you pull down the list it will display all of the available history results in your ACT database.  You can also set your Regarding text.

If you use Groups to segment history, you can link the history item to a Group by default.  This pull-down list will display all of the groups setup in this database.

If you would like to have the button also update the stage of an existing opportunity, you can create a macro on the Opportunity Update tab and link it here.

If you would like the user to be prompted to enter in Details prior to creating the history item, you can select this box to "Open for editing after creation"

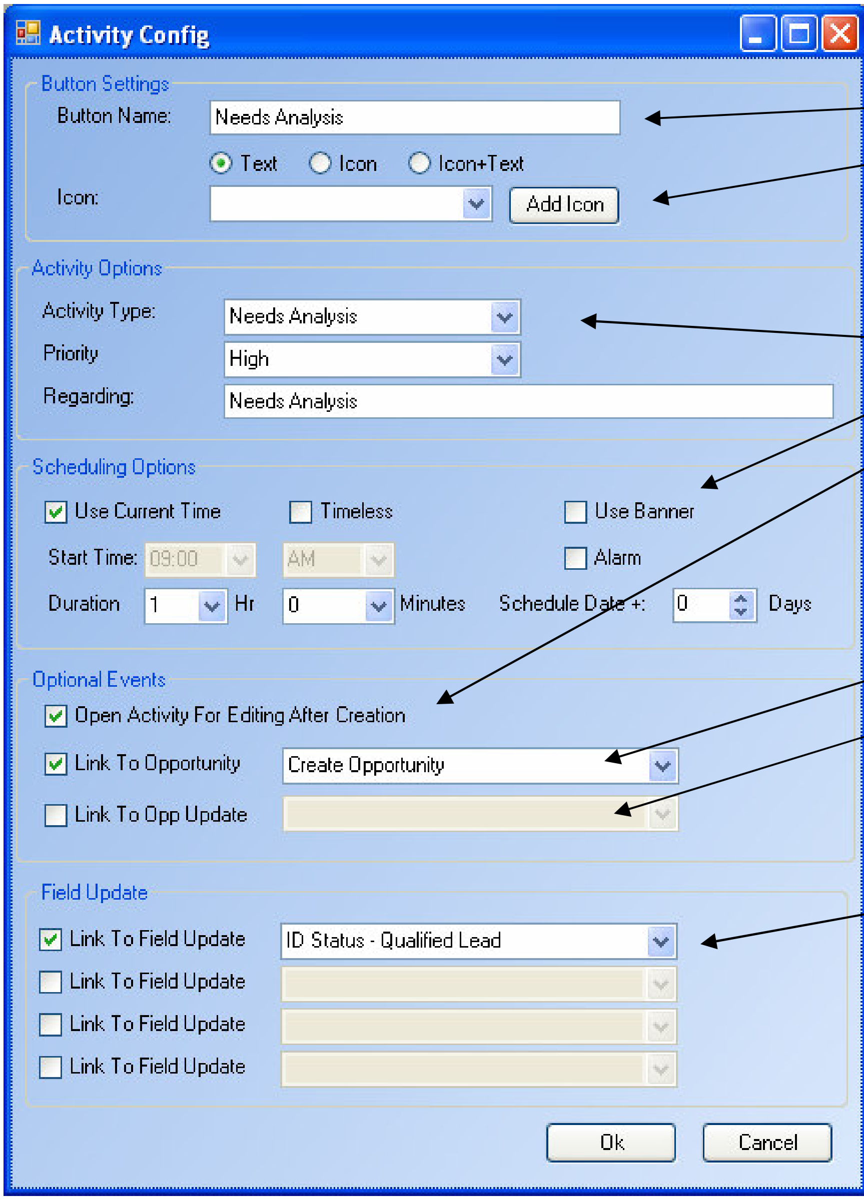
If you would like the button to also update field information, you can build Field Update Macros and link them to the History button in this section.  You can link up to 4 field updates to this history button.

**As soon as you click OK, the History Toolbar Button you just created will appear on the toolbar.  The next time remote users synchronize, they will see it on their toolbars as well.**

**NOTE:  History Config Macros automatically show up as Toolbar Buttons.**

## *Activity Configuration Tab*

You can configure a KPI Toolbar Button to automatically create a predefined activity for the current contact in ACT, plus link to other predefined actions. Let's take a look at the options available:




Give the button a name as you want it to appear on the Toolbar, and you can also assign an icon if you choose.

Specify the Activity Type you would like to create and set the defaults for the Activity. You also have the option of "Opening Activity For Editing After Creation"

If you would like the Activity button to also either create a brand new Opportunity, or update the stage of an existing Opportunity, you can create other macros and link them to the activity button here.

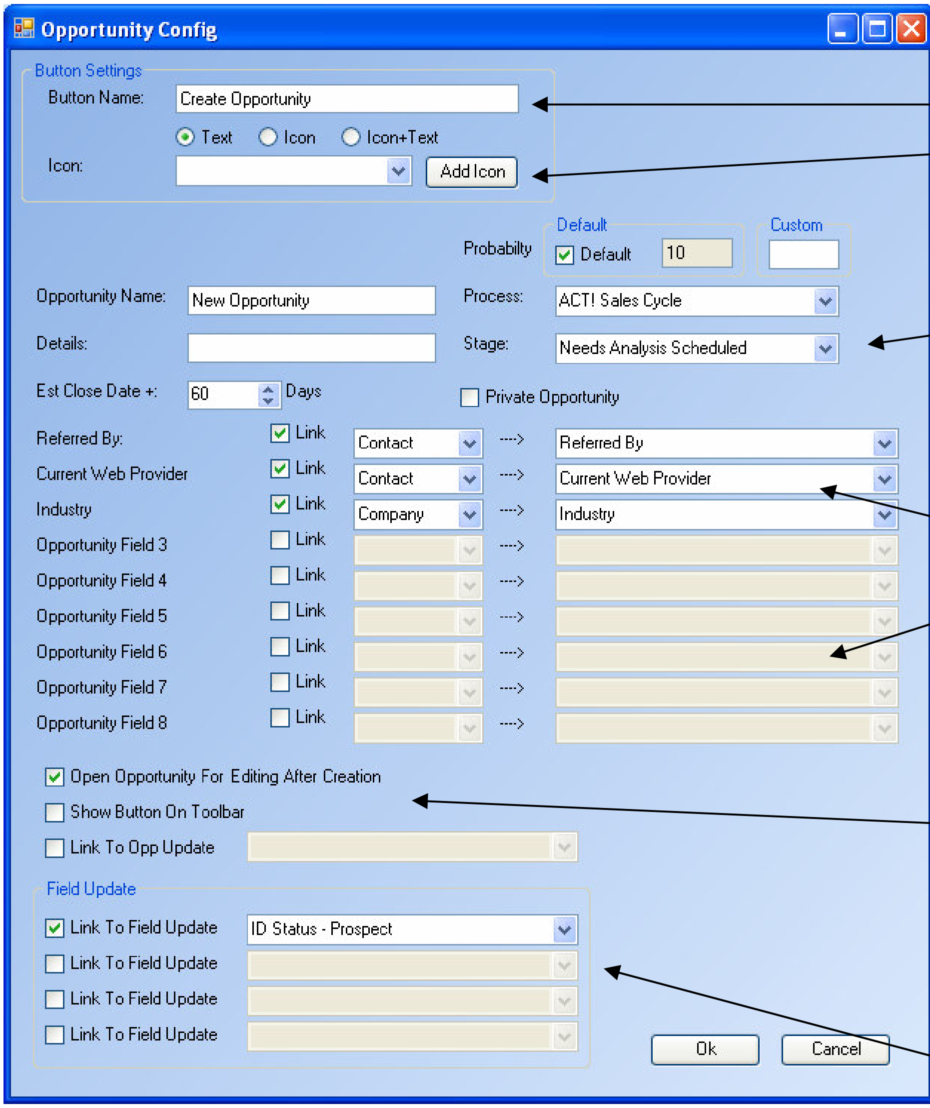
If you would like the button to also update field information, you can build Field Update Macros and link them to the History button in this section. You can link up to 4 field updates to this history button.

**As soon as you click OK, the Activity Toolbar Button you just created will appear on the toolbar. The next time remote users synchronize, they will see it on their toolbars as well.**

**NOTE: Activity Config Macros automatically show up as Toolbar Buttons.**

## *Opportunity Configuration Tab*

You can configure a KPI Toolbar Button to automatically create a predefined Sales Opportunity for the current contact in ACT, plus link to other predefined actions. Let's take a look at the options available:




Give the button a name as you want it to appear on the Toolbar, and you can also assign an icon if you choose.

Pre-set all of the defaults for your Sales Opportunity. The goal is to set up the button so that all that is left for the user is Product and Pricing information.

**COOL FEATURE**
Note that you can copy Contact and Company Field information into your custom Sales Opportunity User Fields as part of the macro!!!
As you rename the Sales Opp user fields, they will automatically update the list on the left-hand side.

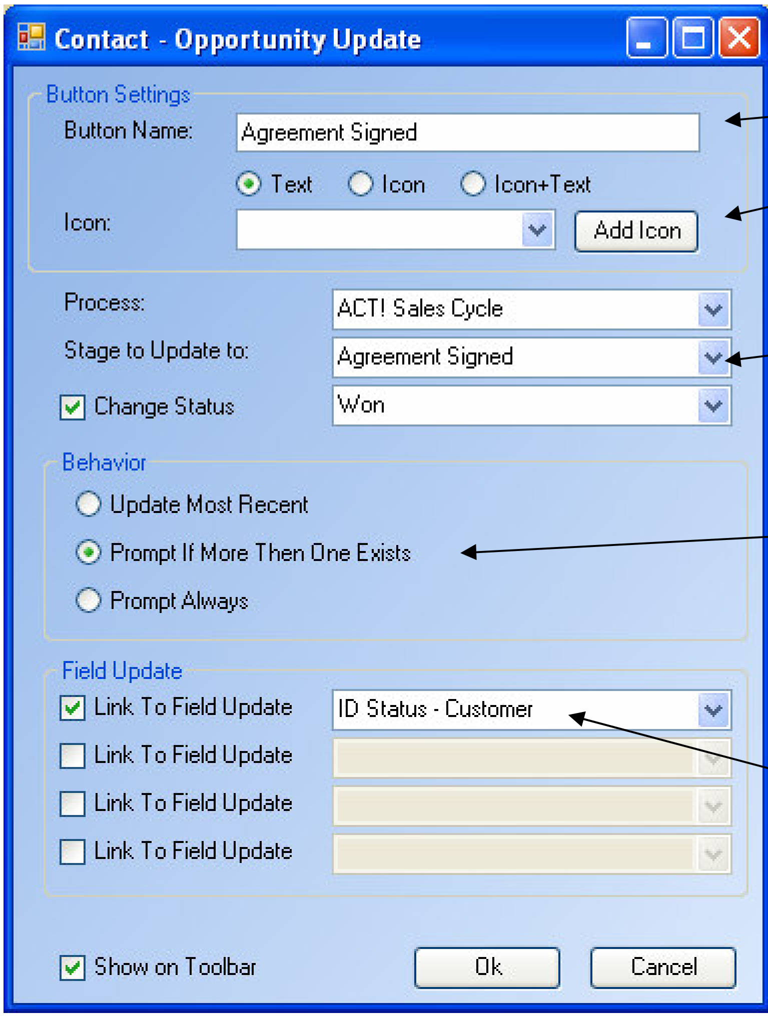
You will want to open the opportunity after creation. You can also choose to create a separate toolbar button, or you can link this macro to another button.

If you would like the button to also update field information, you can build Field Update Macros and link them to the History button in this section. You can link up to 4 field updates to this history button.

**As soon as you click OK, the Opportunity Toolbar Button you just created will appear on the toolbar if you chose the option "SHOW BUTTON ON TOOLBAR". The next time remote users synchronize, they will see it on their toolbars as well.**

## *Opportunity Update Configuration Tab*

You can configure a KPI Toolbar Button to automatically update a Sales Opportunity for the current contact in ACT, plus link to other predefined actions. Let's take a look at the options available:




Give the button a name as you want it to appear on the Toolbar, and you can also assign an icon if you choose.

Determine the Opportunity updates you would like to apply. Most common is to update the opportunity to a specific stage. Note that you can also update the status.

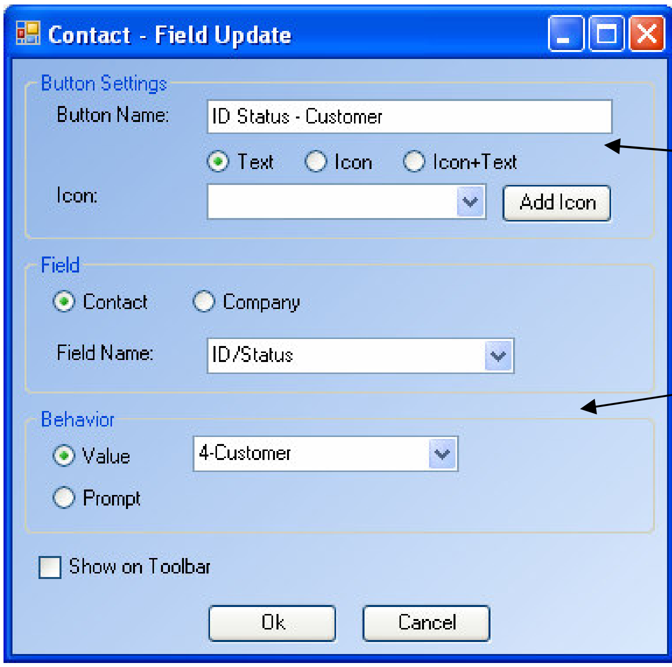
You also get to determine what to do if there are multiple open opportunities.

If you would like the button to also update field information, you can build Field Update Macros and link them to the History button in this section. You can link up to 4 field updates to this history button.

**As soon as you click OK, the Opportunity Update Toolbar Button you just created will appear on the toolbar if you chose the option "SHOW BUTTON ON TOOLBAR". The next time remote users synchronize, they will see it on their toolbars as well.**

## *Field Update Configuration Tab*

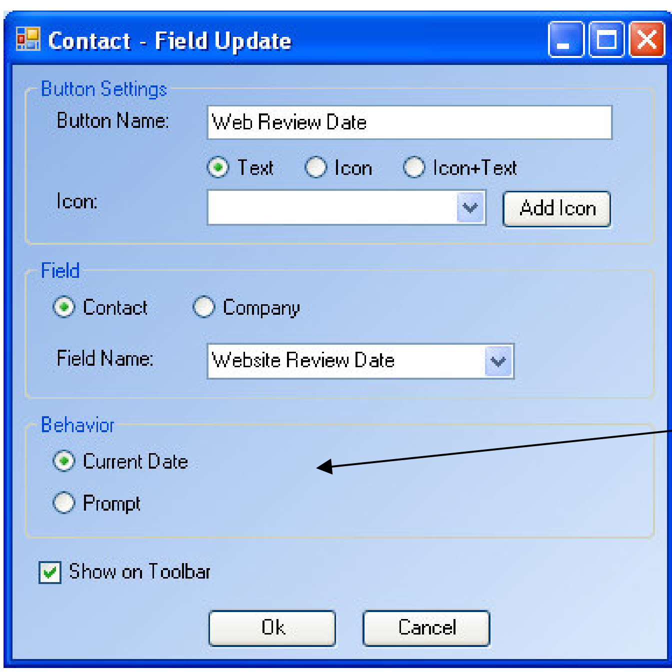
You can configure a Field Update macro using the KPI Toolbar Config Utility. While these field updates can be built as stand-alone buttons, they are most often used as components linked to other buttons. Let's take a look at a couple of examples:




Name your Macro/Button

Specify what field you would like to update and if you want to set it to a specific value, or you want the user to be prompted.

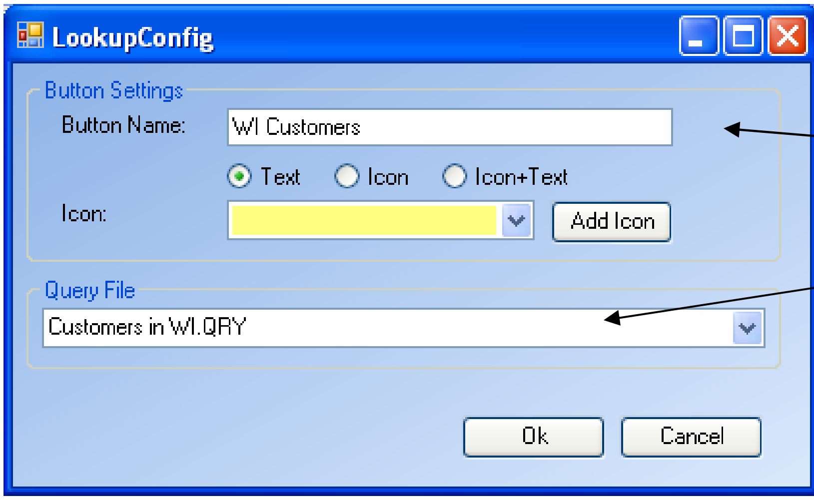
You also have the option of making it a toolbar button




This is an example of a date field update. Note that you can select either the current date or prompt the user for the date.

## *Lookup Configuration Tab*

You can configure a toolbar button to execute a query saved in ACT. Let's take a look at an example:




Name your Macro/Button

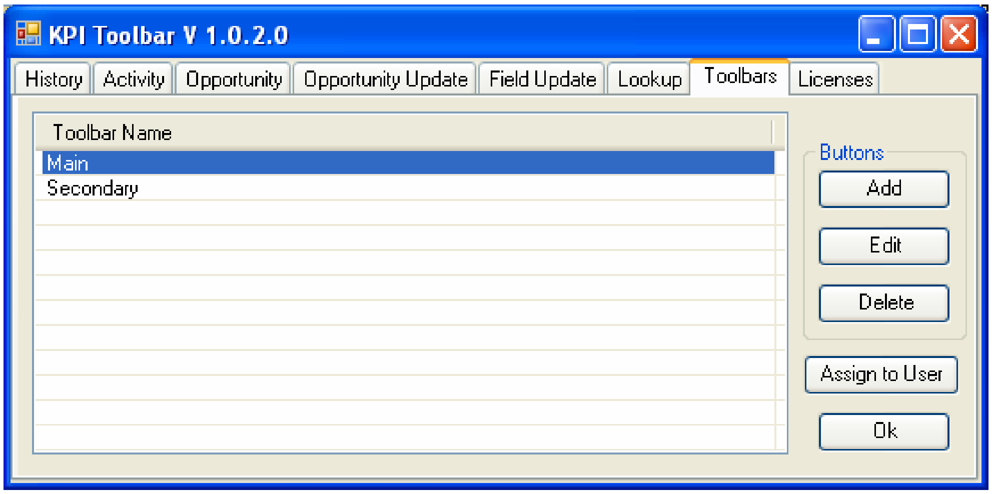
Specify the QRY file you would like to execute when the button is clicked on. The pull down list will display all of the available saved QRY files for the current database.

**As soon as you click OK, the Lookup Toolbar Button you just created will appear on the toolbar. The next time remote users synchronize, they will see it on their toolbars as well.**

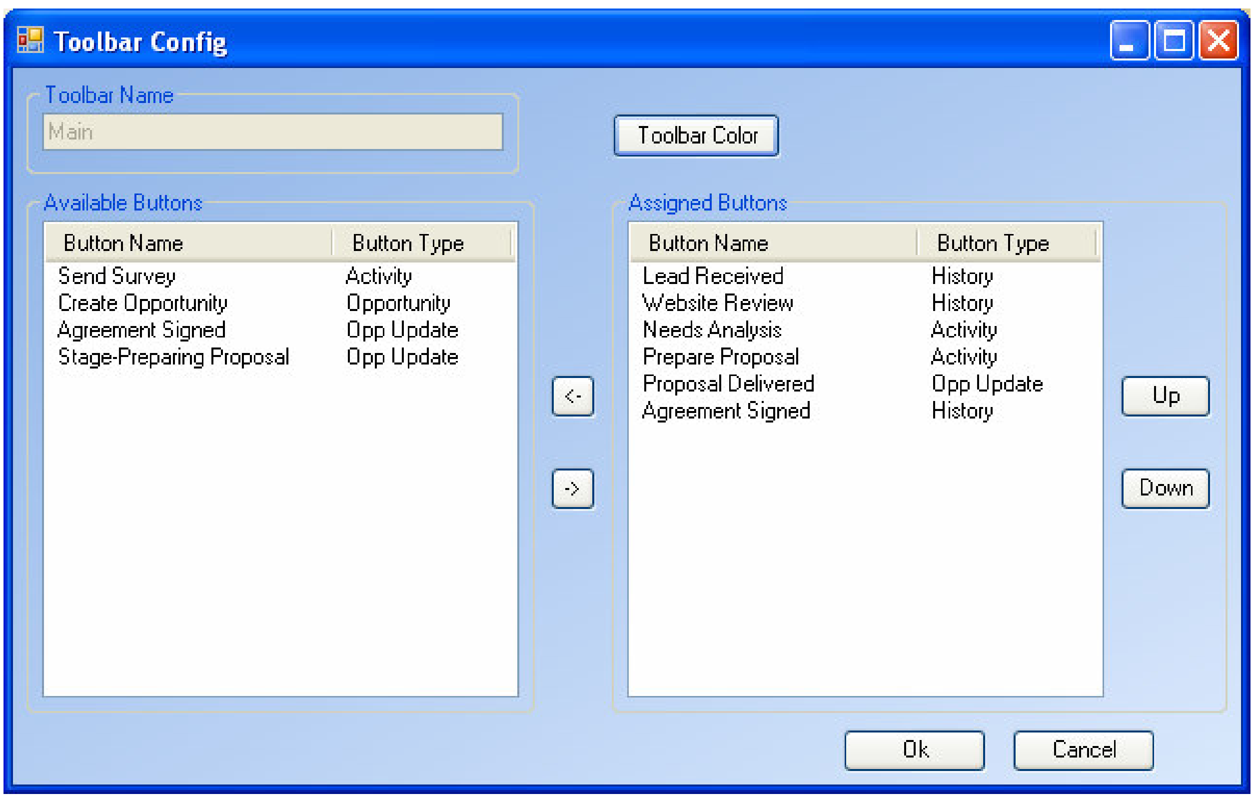
**NOTE: Lookup Config Macros automatically show up as Toolbar Buttons.**

## *Toolbars Configuration Tab*

The Toolbars Configuration tab lets you create multiple toolbars within the One-Click KPI Toolbar product. Within each toolbar you have the ability to determine which buttons are associated with each toolbar and the order of the buttons.




When you add a new toolbar, you will get the following window.



## *Assigning Toolbars to Specific Users*

The Toolbars Configuration tab lets you create multiple toolbars within the One-Click KPI Toolbar product. You will also need to assign the toolbars to specific users within ACT. Click on the ASSIGN TO USER button within the Toolbars tab to perform this assignment.

This function also lets you decide who should see which toolbars, if you have setup specific toolbars for specific departments.