



ACT! 2011 Dashboard and Report Cookbook

by Karen Fredricks & Roy Laudenslager

PACKT Publishing

It's all very well working hard and spending time getting all your data into a CRM – but unless it's easy to get the information out – in the format you need – chances are, after a while, the CRM will start to gather virtual dust.

ACT! has never had a good name for its report writer, and the level of help and documentation included with the product is pretty poor. Sage has worked hard on improving ease of use with the recent launches of ACT! For example the new Welcome screen displays a host of learning options and videos to help the new user get up to speed quickly. Sadly, none of this material covers the use of the ACT! Report Writer.

The Dashboard is a fairly recent addition to ACT! and despite a Feature Tour video covering the basics to get you started, does not cover Although the Dashboards can look useful, it can take a bit of working out how to get the panels to show useful information to you.

Sage has gone some way to helping users understand the report writer and dashboard in a bit more detail in the 'Official ACT! QuickStudy Guide' where there are 32 pages devoted to Reports and a further 8 pages covering Dashboards. But even then you feel that you need to know more, and that you could be getting more, out of these components of ACT!

Now, along comes the Sage ACT! 2011 Dashboard and Report Cookbook from PACKT Publishing which weighs in with 172 pages of information, how to's, tips and walk-throughs. Add to that the authors are Roy Laudenslager (ACT Consultant, ex-ACT support desk and very helpful chap on the ACT Forum's) and Karen Fredricks (CRM expert and author of ACT! For Dummies) and you know you are going to get the best information and help that's out there when it comes to Dashboards and Reports in ACT!

The book assumes you are familiar with the basics of ACT! and already have a database with your contact information in it. It then jumps straight in to showing you how to run the standard reports that ship with ACT! This is then followed by Chapters on Filtering Reports and Creating Quick Reports.



The Chapter on using the Report Editor is excellent and really should be part of the ACT! manual and / or on-line help. This is the where some users start to panic and run away. Here, learning to use the ACT! Editor is practically painless.

If I had one request to the authors, it would be to split Chapter 5 “Subreports and Scripting Techniques” into two and to go a little deeper into both areas. This is the area where even experienced users get lost and often give up. The book itself says that ‘ACT! Report capabilities can be dramatically expanded through the use of embedded Visual Basic program scripts’ so it would have been helpful for this topic to have received further attention. Further examples of subreports and using visual basic program scripts would have taken this book from ‘great’ to ‘wow’ – but I am being picky here.

A final chapter on working with Labels and Envelopes (which are amended and created using the ACT! Report Writer) winds up the material on using ACT! Reports.

The book then moves on to using The Dashboard within ACT! and follows a similar sequence to that of Reports. First we learn how to use the default Dashboards provided with ACT, then to make changes to these Dashboards and finally how to make your own Dashboards from scratch. Perhaps there could be greater emphasis on the difference between ACT! Professional and ACT! Premium when creating Dashboards, as many of the examples shown are only possible with ACT! Premium. Getting your Dashboards displayed, printed and into other programs such as PowerPoint are also covered.

The overall style is simple clear English, lots of screen shots and step by step instructions. Nothing is rushed and everything is clearly laid out.

I have been using ACT for over 20 years and supporting and consulting on it myself for nearly 10 of those years. Did I learn anything new whilst reading this book? Yes, I did. I learned quite a lot of new tricks and tips. Although the title of the book is ACT! 2011 – it equally well covers ACT ! 2012 (in beta test at the time of writing) as well as earlier versions of ACT! (2009 & 2010).

Overall a great addition to your ACT! reference library.

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