

Sage ACT! 2011 Dashboard and Report Cookbook

Karen Fredricks, Roy Laudenslager
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Sage ACT! 2011 Dashboard and Report Cookbook

Over 65 simple and incredibly effective recipes for creating and customizing exciting Dashboards and Reports from your ACT! data

Karen Fredricks Roy Laudenslager [PACKT] enterprise PUBLISHING

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Karen Fredricks, Roy Laudenslager : Sage ACT! 2011 Dashboard and Report Cookbook before purchasing it in order to gage whether or not it would be worth my time, and all praised Sage ACT! 2011 Dashboard and Report Cookbook:

0 of 0 people found the following review helpful. Sage Act 2011 Dashboard and Report CookbookBy Randy BancroftI have been a long time user of Act and rarely used the available reports and never used the Dashboard. Since purchasing the Sage Act 2011 Dashboard and Report Cookbook and working through all the practice exercises in the book, I am now using a custom Dashboard layout as my opening screen and have even created some custom reports for my business. I especially like the detailed focus on only a couple of the act features instead of the general coverage of many features. If you want to increase your proficiency with reports and dashboards, this book is excellent and will be very beneficial for you.Highly Recommended!0 of 0 people found the following review helpful. Very helpful with report creationBy Tom TippsAlthough it was intended for an earlier Act version, most of it was relevant to helping me understand how to design reports from scratch. I could not find any other book as helpful as this one on this topic. I would encourage the author to revise the book for the next version of Act because it really is a great help--I would buy a copy!0 of 0 people found the following review helpful. dump the exclamationBy W BoudvilleLet me say upfront

that it rapidly gets tedious reading this "Sage ACT!" that is peppered throughout the text. It's that exclamation mark that I object to. Perhaps the first time it may seem cute, but it gets old rapidly. Just like how Yahoo is strictly meant to have an exclamation mark. The authors could have exercised better discretion by dropping it and doing the readers a visual favour, instead of vapidly following the company's direction. But what about what the book actually says? I have never used this Sage CRM product. But the 65 or so examples given have the merit of brevity and well chosen screen captures. You can understand what each example is trying to do. Now if I can do this, then for someone who has used Sage, it should be straightforward. The most complex examples, such as they are, seem to involve the use of scripting in report generation. The only scripting language allowed seems to be Visual Basic. This is easy enough to learn, if you are already a programmer in another language. The scripting examples have some of the ambiance of programming spreadsheets, like Excel, where you are making relations between different cells. So if you have a background in Excel coding, Sage ACT is a short segue. The Dashboard has the most intricate graphics in the examples, by comparison with examples that don't use it. But this is relative. In an absolute sense, what I could discern of the types of graphs is a trifle limited. Are scatterplots possible? Or 3 dimensional graphs? And aside from the Dashboard, what types of statistics can be computed in the reports? If you have used SAS or R, these are natural questions.

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

About the Author Karen Fredricks Karen Fredricks began her life rather non-technically growing up in Kenya. She likes to say that she developed her sense of humor while dodging bombs in Beirut where she attended high school. She graduated from the University of Florida and holds degrees in English, Theatre and Accounting. She settled in Boca Raton where she includes tennis, trips to the gym and cheering for the Gators in her busy schedule. A true CRM expert, Karen is the author of over ten For Dummies books, including titles on ACT!, SugarCRM, Outlook, Business Contact Manager, Office Live and Marketing with Microsoft Office 2007. This is her sixth book devoted to ACT!. Karen's firm, Tech Benders, customizes popular contact management and CRM software to help businesses grow by being more productive, efficient, and profitable. Karen believes in working smarter in order to have the time to enjoy life and tries to install that philosophy in her clients.

Roy Laudenslager Roy has spent his entire career working on computers. He likes to say he barely missed the vacuum tube computers. He's repaired them, written numerous training manuals about them and spent many years troubleshooting them. He began working for Symantec when they combined all their technical support in a new site in Eugene, Oregon. When they acquired the ACT! program, he was one of the first ACT! support agents. He was already familiar with the ACT! program having used the DOS version at another company. He spent the next 10 years supporting the ACT! program for Symantec, then InterACT Commerce Corporation and finally for Sage Software. By the time he left, he was the lead support agent for ACT! "escalations". Escalations are the problems that the regular support agents are unable to solve; his job was to solve the "unsolvable". He also trained new support staff on database field modifications, reports, and synchronization. His expertise in the area of synchronization led to the Knowledge Base document that he wrote for setting up synchronization, making it possible to synchronize ACT! 3 through 6 reliably. After 10-years in ACT! technical support, he wanted to become an ACT! Consultant so he left Sage and joined Karen Fredricks as part of Tech Benders to allow him to do what he loved to do: work with ACT! users! Roy has worked with the ACT! reports since ACT! for Windows 2.0 and is known around Sage as the ACT! report writer guru. He wrote the 12 new reports that first appeared in ACT! 2010/12. In the early part of his career, Roy spent several years working as a technical writer and authored many training and reference manuals. While working in technical supports for Symantec and later Sage, he contributed one or more articles monthly to the Easy ACT! newsletter. This body of work took place over a 7-year period and represented over 100 articles. Most recently he was the Technical Editor for the Dummies books on ACT! Versions 7-11.