



NCALERA NEWS

JULY 2003 SPECIAL

ACT! TRAINING

Those who missed the presentation on July 11 around the maximization of use of ACT! 6 really missed a great show. Bud Rice, an ACT! Certified Consultant, gave us the introduction and got us involved in a lot of problem-solving situations. Something like instant familiarity.

We had an excellent turnout, with over 25 eager participants. The Q&A session went on for quite some time and the questions were shared with new users and old alike.

In case you are wondering, Bud is the leader of the Bay Area Act Users Group (their e-mail address is shown below). Just click on this link or, if your e-mail system didn't pick up the hyperlink, just copy and paste it into your browser.

<http://www.execbus.net/Bay Area ACT Users Group.html> You'll learn everything there is to know about BAAUG.



and Crowd right. >>



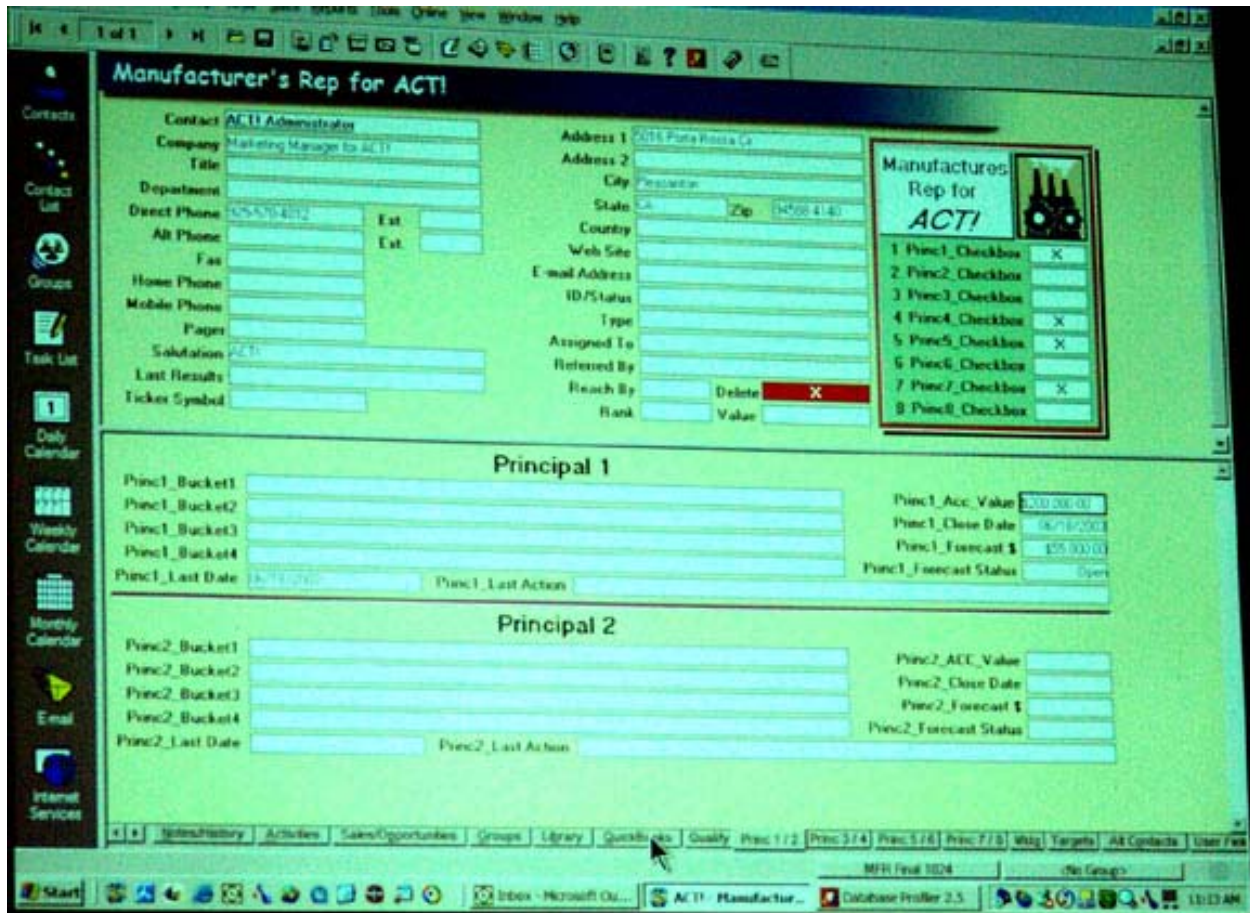
Now, here is how the crowd looked, from different views: << Crowd left, looking at Bud's back



<< And, of course, everybody, including Bud (extreme left), looking at the screen.

NCALERA NEWS ACT! SPECIAL TRAINING – JULY 2003

And here we see what they were all looking at.



This is a special layout for manufacturer's representatives. It is being designed by Bud Rice, with the help of the participating members at the BAAUG meetings. Take a look at some of the features being designed into it and how easy it will be to operate in and around.

At the top-left side of the contact screen you will see all the usual contact data entries, name, address, etc. This runs through the first (left) column and down the right column through ID/Status. The next few show the type of customer; referred by; reach by (which tells the reader how the customer prefers to be reached, phone, fax, e-mail, etc.); Provisions for a delete selection; a ranking; and the value of this customer.

The box on the right side of the screen, labeled Manufacturers Rep for ACT!, provides for the names of principals and relates to (is linked to) the two sections on the lower half of the screen labeled Principal 1 & 2. You'll note that certain principals are selected in the box. This was during a demo and the action had not been taken but in practice the principals selected would appear in the two sections below. In other words, if the action had been activated, the two boxes would contain Principal 1 and Principal 4.

NCALERA NEWS ACT! SPECIAL TRAINING – JULY 2003

The Buckets on the left can be assigned any data task. Here you can enter forecast data; new designs in work; status of samples ordered (or delivered); or any other data that merits attention. On the right of this panel, there is a place for important sales data, dollars, close date, forecasts and forecast status.

This special layout is still in design. To stay with it you may want to consider attending the next BAAUG meeting which will be listed on their website.

All in all, this was an excellent presentation. What we learned was that we need to do more of the same. We will be surveying a few of the people who attended by phone, to get a better feel for what impressed them the most and what they recommend should come next. You can be assured, there will be . . .

More to come.