



ACT! 2005 Premium for Workgroups
In-house customized use at AutoNetTV

- I have been using ACT! since early 2004. I thought it was a nightmare at first. I knew nothing of the program, and was asked to customize our database specifically for our use. I can say now very confidently that we have had great success with ACT! Of course I cannot say enough about the very capable ACT! consultant we have used through many issues over the past couple of years.
- I have included hundreds of fields in ACT! which allow us access to any documentation at any time by simply customizing desired columns in a look-up. I am able to export, or import, Excel spreadsheets, used for reporting, or adding groups of prospects to ACT!
- Some of the ways in which we are using ACT! are:
 - 1) I have added a tab to include accounting with fields for invoice #, amt paid, date paid, and payment information. I can export any information monthly about our sales.
 - 2) I have added tabs specific to our industry: content sent dates (for monthly programming sent), site information (with many specific fields & and one notes field), and services provided by a location (helpful in script writing).
 - 3) I have added customized activities and potential results for use in the History tab.
 - 4) We have fields that include the dates for: the last program survey taken from a customer, dates for contracts rec'd, end of contract period, equipment shipped and installed, welcome packets sent.
 - 5) I can track groups to whom commissions are owed on a monthly basis, as well as tracking commissions for in-house sales reps.
 - 6) The creation of Company detail groups, as well as other groups, aids us in keeping every customer affiliated with a group or corporation together.
 - 7) Our new customers are added or deleted from our network group so that we can keep current on all existing customers and export a report weekly for our meetings.
 - 8) We can find the referral for any contact, find the branding of any contact, etc.
- Fields, fields, fields are the answer to most needs for businesses. Also, creating customized tabs allow one to build any number of specialized fields for a business. Remember the tab will allow one to scroll down to infinity, as long as fields are present.

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