

# Managing Your Day

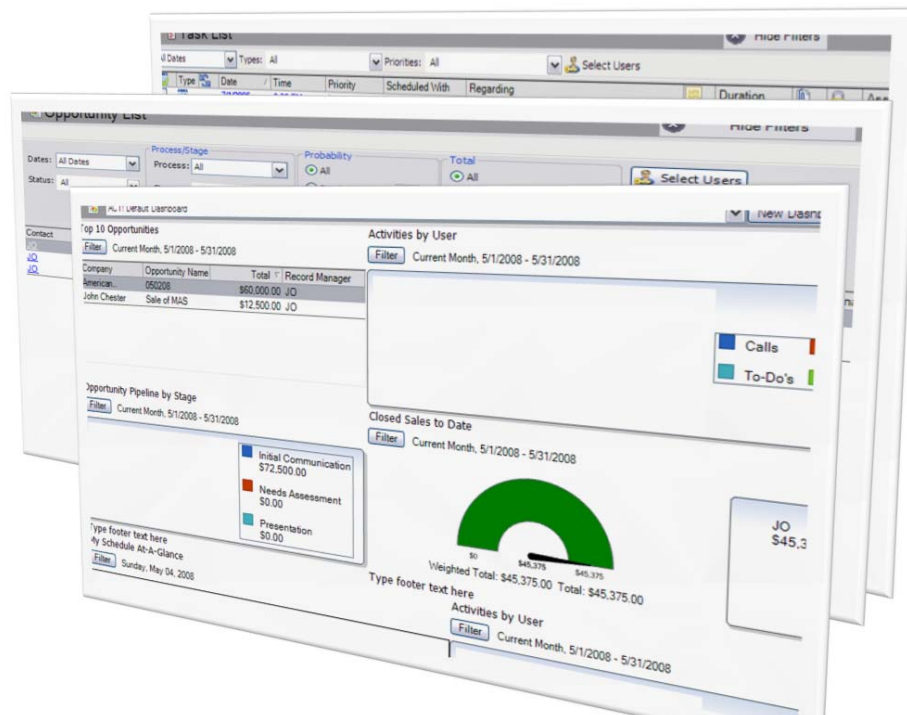
*and Opportunities with ACT! by Sage*

## Organizing and Managing Your Day and Opportunities with ACT! by Sage

- Scheduling an activity is easy with The ACT! Calendar – simply right-click on the day you wish to schedule an activity and follow the prompts.
- Viewing meetings, calls, follow-ups and reminders can be accomplished through Task List which provides various sorting and filtering capabilities.
- Using Opportunities list allows user to determine which leads are most suitable to pursue by narrowing down criteria based on status, amount of the possible sale and the sale stage the lead is in.
- Display, print or report activities using the new feature in ACT! 2008 – The ACT! Dashboard. It's customizable by user and can display activities, top opportunities, and opportunities by pipeline, closed sales and more.

### Most useful features

1. *Schedule Activities using The ACT! Calendar*
2. *View Task Lists*
3. *Manage Opportunities*
4. *Utilize newest feature - Dashboard*





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## Tracking lead sources

- Communicate more effectively.
- Interactive dashboards – allow you to access up to the minute information easily at your fingertips.
- Manage information from several users both in-house and remote in a single database.
- Track Sales Opportunities – by user, by stage, by status, referred by, with % probability, the competition and more.
- Remote synchronization – once databases are initially established you can maintain current information from remote databases with periodic synchronization

### Streamlining Features of ACT!

- *Instant Quotes*
- *Notes & History*
- *Lookup by Example*

Type	Date	Time	Priority	Scheduled With	Regarding	Duration	Assoc
	7/1/2005	8:38 PM	Low	<a href="#">Mark Howard</a>	inspect the roof	5 minutes	
	8/20/2005	8:37 PM	Low	<a href="#">Mark Howard</a>	review of the basement	1 hour	
	8/21/2005	8:41 PM	Low	<a href="#">Brian Hutcheon</a>	the proposal at the Milford Mall	10 minutes	
	10/17/2005	9:59 AM	Low	<a href="#">Mark Howard</a>	bob	5 minutes	
	1/29/2007	1:19 PM	Low	<a href="#">Joseph Hobbs</a>	so 12345	3 hours	
	4/1/2008	8:23 AM	Low	<a href="#">Call to discuss...</a>	Call to set up time for a product Demo	10 minutes	
	4/2/2008	8:23 AM	Low	<a href="#">JO</a>	Meeting to review the proposal	1 hour	
	4/3/2008	None	Low	<a href="#">JO</a>	TO Do: Mail brochure	5 minutes	

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