XACT

INSIDE ACT!

Smart Dash Advanced Reporting

Extend the ACT! Dashboard with Smart Dash by Xact Software

Smart Dash is a powerful and flexible reporting tool that works inside ACT! With Smart Dash you can simultaneously analyse data from ACT! and any other external database* in one central location.

Why Smart Dash?

Smart Dash provides flexibility beyond ACT!'s own dashboard, giving users unlimited potential to customize queries.

- Report on data from your ACT! Contacts, Groups, Companies, Activities, Opportunities and even custom tables

- Report on any compatible external database such as Microsoft Access, QuoteWerks or QuickBooks* right from within ACT!

- Include filters in your reports that aren't available in any other reporting tool for ACT!

- Display report results using Google Maps and Google Charts

- Export report data to Excel for further analysis

- Mix and match Smart Dash reports with any default ACT! dashboard.

Reporting with Smart Dash

There are unlimited possibilities for dashboards and reports that you can create with Smart Dash.

Smart Dash comes with pre-configured dashboards so you can get analyzing straight away. Xact Software also offers a query building service and **if you have a custom reporting idea that we think will be popular - we'll do it for FREE!**

Some of the custom reports we've created so far include:

- A pie chart showing current stock on hand live from the accounting system

- An area chart displaying accumulated sales by month by year

- A Google map grouping prospects by country

- Take a look over the page at some great examples.

*Databases must be ODBC or OLEDB compatible. In some cases you may also need a 3rd party connector, for example to connect with QuickBooks you will be required to have the QDBC driver installed.

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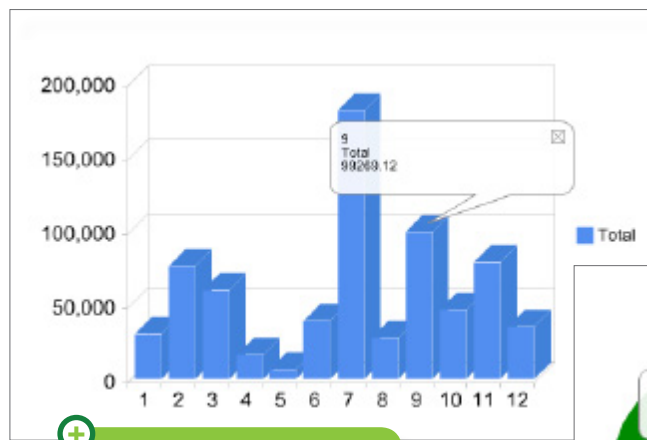
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Example reports you can create

Date	Contact	Company	Type	Regarding
9/04/...	Chris Huffman	CH TechONE	Meeting Held	Network Breakfast
25/08...	Ethan Campbell	Yellow Jersey Bikes	Meeting Held	Presentation
25/08...	Wilhelm Loke	Yellow Jersey Bikes	Meeting Held	Presentation
25/08...	Lance Parker	Yellow Jersey Bikes	Meeting Held	Presentation
11/04...	Morty Manicotti	Corleone's Pasta Company	Meeting Held	Lunch Meeting
9/04/...	Ernst Anderson	CH TechONE	Meeting Held	Expense and Sales Reports
9/08/...	Chris Huffman	CH TechONE	Meeting Held	Network Breakfast
9/04/...	Melissa Pearce	CH TechONE	Meeting Held	Staff Meeting
19/04...	Silvia Carlini	Hospital de la Gente	New Opportunity	New Opportunity - ACT! Sales Cycle ...
9/04/...	Allison Mikola	CH TechONE	To-do Done	Prepare Sales Report and Plan Next ...
30/10...	Jane Bellamy	Boomers Artworx	New Opportunity	Headquarters - ACT! Sales Cycle Initi...
9/04/...	Allison Mikola	CH TechONE	Meeting Held	Networking Breakfast
17/04...	Lance Parker	Yellow Jersey Bikes	E-mail Sent	Confirming Our Appointment
24/04...	Timothy Hanks	Wilson Co.	Meeting Held	Presentation
9/04/...	Allison Mikola	CH TechONE	To-do Done	Prepare Sales Report and Plan Next ...
31/10...	Mitch Brenner	Bodega's Bodacious Birds	Opportunity Won	Bodega Bay HQ $12,000.00 Closed - ...
28/02...	Danielle Hermez	Xact Software	E-mail Sent	MailChimp Campaign: test - Status: sent

View the last 20 history entries in your database and filter by History Creator or Activity Type

See the total value of Won or Lost Opportunities for each month in a year

View all of the products against your 'Open', 'Closed – Won' or 'Closed – Lost' opportunities
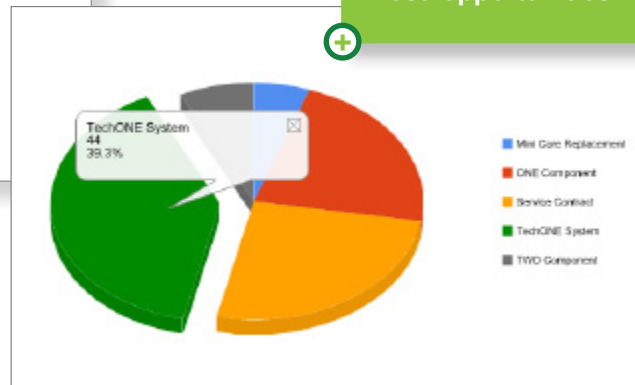
Display the location of all your upcoming meetings on a Google Map.

See Smart Dash in action on our live demo site
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