

# ACT!2000 SalesProcessTracker

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## Installation and Usage

ACT!2000 **Sales Process Tracker** provides an easy way to track the progress of Sales/Opportunities through the pipeline, by creating a History entry each time the Sales Stage is changed.

ACT!2000 provides the capability to record forecasted Sales Opportunities, and to update the Sales Stage as an opportunity moves from discovery to closure. ACT!2000 also records a “historical event” when the Status of the Sales Opportunity changes from “Active” to “Closed/Won” or to “Lost”. However, ACT!2000 does not capture or record when the Sales Stage changes.

Many sales organizations need to analyze their productivity by reporting on the movement of forecasted sales through the various stages in their sales cycle. Sales Process Tracker generates an ACT! History entry when used to change the Sales Stage on a Sales Opportunity record.

These history entries become a part of the “standard” ACT! Notes and History entries, and can be reported using various reporting tools. Foremost of these tools is Crystal Report Writer (CRW), which provides powerful reporting features as well as an “understanding” of the ACT! data structures.

However, even CRW can’t access certain information “hidden” in the ACT! data – such as the Prior Value of fields when they are changed, or elapsed time between the original Forecasting of a Sale and its Close or Loss. **Notes History Extractor** from The New Hampton Group takes an extract of the ACT! Notes and History table, and creates a Microsoft Access database with lots of supplemental data, including Prior Values of changed fields, how long those prior values were “in effect”, changes in Sales Stage (when used in conjunction with **Sales Process Tracker**), and when Sales are first forecasted.


## Installation

1. Shut down all running programs
2. Run **Install\_SalesProcessTracker.exe**
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg\SalesProcess.exe** on your hard-drive, and add the SalesProcess.exe program as an ACT! custom command. It will also put the SalesProcessTracker icon  on the toolbar, and adds "SalesProcess" as an item on the Sales menu, of the Contacts View.

## Usage

Start ACT! and open any database that is used to track sales opportunity forecasts. Switch to the Contacts view, and select the Sales/Opportunity tab. Select/highlight any existing Sales Opportunity (or add a new one, if necessary, and then select it). With the desired Sales Opportunity highlighted, click the

SalesProcessTracker icon  on the toolbar, or select the Sales menu then select the SalesProcess menu item.

A window opens with a scrolling list, in alphabetical order, of the Sales Stages defined in that database. Select the Sales Stage that the Sales Opportunity should have, and click [OK]. The Sales Stage of that Opportunity is updated, and a history entry is created, with a *Type* of "Note", and a *Regarding* of "Sales Stage changed to" followed by the selected stage text, then followed by "// SID=" and the 12-character ACT! internal identifier of that Sales Opportunity (so that it can be "linked" to the rest of the information about that Sales Opportunity when running reports).

SalesProcessTracker v1.2 now offers the option to additionally add this information to the "beginning" or "top" of the Sales/Opportunity "Details" field. If the "Record change in Details" check-box is "checked", then the fact of the change is inserted at the beginning of the Details field, in the following format:

```
Sales Stage changed to: newstage
from: oldstage
on: today'sdate
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```

This option is "sticky"; i.e., the next time you use SalesProcessTracker, you previous selection will be remembered and active.