

I didn't know I could do that with ACT! Part 2 - Reports

There are a lot of features in ACT! that are fun to use; report design isn't one of them. ACT! installs with about 40 reports with which users can generate notes, history, activity, sales opportunities, company, group, and contact reports. Default reports can be customized to a greater or lesser degree (or new reports created) and then the report can be filtered at run-time by date ranges, record manager, etc. While simple reports in ACT! are fine for many users, ACT! reports don't do a good job of bridging tables (Contacts, Notes, Activities, etc.) , nor is there much control over grouping data in logical ways.



Trying to customize an ACT! report.

Running a default report from the Reports menu is simple enough, but customizing a report? Ouch. Definitely not fun. Take a look at the ACT! report designer (Reports> Edit Report), select a report such as the Contact Report, and you'll find sections and sub-reports and Properties (F4) where the appearance, structure, and behavior can be customized. Frankly, the report designer is daunting and it's rare for even an advanced user to master it.

To get beyond basic report limitations consider pre-packaged reports from 3rd party developers. These include custom ACT! reports created by ACT! Report Guru Roy Laudenslager of [TechBenders](#) and Crystal Clear Reporting from ADS Programming Services. [Crystal Clear](#) delivers 40 reports that can be run from the ACT! report menu and prompts allow the user to further customize the report. Each report package is under \$100 so if predefined reports suit, then they are well worth the price.

In our experience, many of our SBE clients don't want the limitations of static reports. They prefer to create and adapt reports in response to evolving business requirements. We recommend [Stonefield Query](#) for businesses who require more advanced reports because, unlike Crystal Reports, even a novice can create sophisticated reports with very little training (often less than an hour). [Report wizards](#) guide the design of charts, graphs, cross-tab, summary and detail reports.

Stonefield Query lets users report on all of the "native" ACT! tables (Contact, Company, Notes, Activities, History, Sales Opportunities, etc.), as well as custom tables that can be added to a ACT! database (more about custom tables in a future article). In addition, there are multiple output options that include PDF, HTML, XML, XPS, Excel®, CSV, Word® RTF, and DBF. In it's newest release, Stonefield even let's you add existing Crystal reports which you can filter through the Stonefield

Query interface - that's pretty amazing.

At \$600 including a year's worth of maintenance, Stonefield Query comes packaged with five "run-time" licenses; reports can be created by a "report administrator" then distributed throughout the organization for others to run. And, yes, creating the reports is actually fun!

Although we're focusing on ACT! integration, you should know that Stonefield Software has reporting solutions for other contact management, ERP, and CRM products as well, including SalesLogix, GoldMine, Sage MAS 90 and MAS 200, Timberline, and others. That's significant if your company is Sage-software focused, as you can use the reporting tool with a number of your business applications.

Watch for *I didn't know I could do that with ACT! Part 3* where we'll look at ACT!'s internal dashboards and compare them to advanced third-party dashboards from TopLine Dash.

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