Sales Opportunities Get "Real" with ACT! 2010

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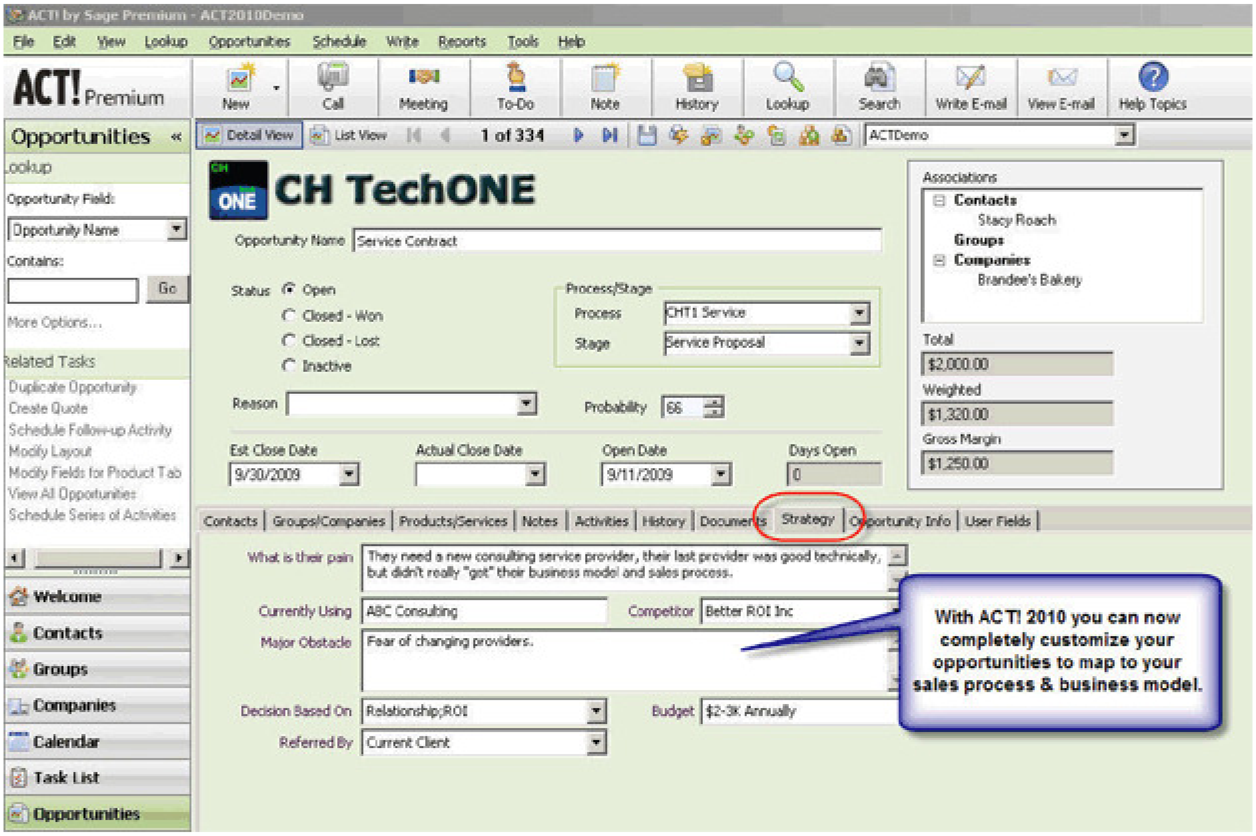
ACT! is an effective tool for any organization that needs to track relationships with contacts. But it has always had a special place with sales people and sales managers. The sales opportunity feature has always been a powerful tool to help you focus on and manage your sales opportunities. There were, however, some limitations with opportunities in past versions, but with the enhancements to the opportunity module in ACT! 2010, sales opportunities are now “Real” and Real is Good.

We Hated Saying No
What do I mean by “Real?” Well, one of the things that people love about ACT! is the ease with which you can completely customize your ACT! Contacts, Companies and Groups. In the past as we talked with our customers about customizing their database to match their business model, we would eventually get to the point where we would be looking at the Sales Opportunity screens. Customers would natually start asking for all kinds of customization on opportunities. I hated to have to tell them “No, you can’t change that screen on the opportunity dialog box”, or “Whoa, you only have 8 user fields you can customize.” It was a lot like reaching into a big bowl of fresh fruit and pulling out a wax orange. Given the customization flexibility of the rest of ACT! these conversations left our customers perplexed. But no more. Now we can say “YES!”

Sales Opportunities – Now REAL!
With ACT! 2010 you can now customize opportunities to completely fit your business model and sales process. Sales Opportunities are now a “real” entity, just like Contact, Companies and Groups. You can add any number of custom fields to the opportunity table and control exactly where those fields appear on the screen via a custom opportunity layout. Would you like a custom tab on the opportunity to collect information based on a particular sales strategy? Done. How about a custom tab with detailed fields on the customer or prospect’s current products and services and their needs? You got it.



But Wait, There's More

And it gets better… because sales opportunities are now a "real" entity like Contacts & Companies, you can have an opportunity that is not linked to any contact. No really, you can. Of course you can associate an opportunity with one or even multiple contacts with an opportunity. Or you can simply associate the opportunity with a company record.

That's Not All

And just like Contacts and Companies, can track Notes, Histories, Activities and Documents on an opportunity. This means that you can view the follow up associated with an opportunity and it's linked to the opportunity, not to a contact. Of course, you can also link the follow up to a specific contact or company as well.

Time to Get Real

If you aren't using ACT! to track your deals as they move through your sales pipeline, then you are missing some powerful functionality to help you focus on your potential opportunities and close more sales.

If you are using an older version of ACT! to track your opportunities, then you really ought to check out the new opportunity functionality with ACT! 2010. It just might be time for you to "Get Real!"