

ACT! Custom Programming

Here are some sample ideas of what the Act Today team can do for you...

Scheduling

- Force the user to schedule an activity when a field is changed based on the field's value.
- Automatically schedule an activity series when an opportunity changes stage.
- Automatically schedule an activity series when field value changes to a specific value.

Opportunities

- Automatically move the opportunity onto the next stage when the associated activities have been cleared.

Import/Export

- Import data from Email messages.
- Import into Contact, Company, Group, Activity, History, Note, and Opportunity records.
- Export from Contact, Company, Group, Activity, History, Note, and Opportunity records to Excel and Word.
- Customs tables linked to Contact records, with a scheduled import of data from an external SQL database into these custom tables, and custom tabs in ACT! to view this data.

Data Management

- Dynamic drop-down list based on a lookup criteria.
- Conditional locking of contact fields (e.g. only allow the field's value to be set once).
- Automatically archive contacts to a separate database based on a field's value (the equivalent of exporting the contacts and then deleting them).

Miscellaneous

- When clearing an activity, the history text colour is based on the Regarding value.
- Automatically send SMS/Email when an opportunity changes stage, a field value changes or an activity is scheduled.