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Act! Calculated Fields Peek #Actv16Peek #ActCRM

by **benjamin** 08-02-2013 10:57 AM - edited 08-02-2013 10:57 AM

How many days do we have until this customer's contract renewal? What is my commission on this opportunity based off of its weighted total? What's the average age of my key customers?

Aaaaaaag!! These simple questions can drive a person mad trying to figure out how to get to this information. I've got the data, but I need to export it to Excel and figure out date calculations?!

I need this in Act! or quickly available outside of it.

Done.

Act! v16 puts your data to work for you by performing calculations automatically in a field using data from other standard or custom fields. Use calculations based on age, date, percentage, dollar value, currency, and other data to help you prioritize and make data-driven decisions. Automate specific actions based on calculated data, including contract renewals, birthday and thank you notes, follow-up surveys, restock reminders – and more.

Act! v16 has a new field type of calculated fields that allows you to count days and years between today and a date, or make simple to complicated mathematical expressions of off number fields in your database. This is available for Contacts, Groups, Companies, Opportunities, and even products (customer ordered 2,112 units, how many boxes is that?). We implemented this in a way that makes this instantly available through desktop, web, or mobile. This data syncs, exports, and you can create lookups off of it. You can even trigger a Smart Task so that 15 days before the contract renewal date you schedule a call to review this year's plan.

See below for a silent video of Age and Commission fields in use.

<http://www.screencast.com/t/anwXTd1Ha2R>

How would this feature make your life easier?

Benjamin Lederer
Product Manager for Act!

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by **mrogers** on 08-02-2013 01:13 PM

Have been asked if this could be done more than once. Thanks.

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by **GLComputing** on 08-07-2013 12:44 PM

Mark, just FYI, it's been possible for a few years (with a few extra functions):
http://www.exponencial.com/actaddons/actaddon.aspx?ID=111&ResID=Aff_glc0742

But yes, great that the basic functions are going to be in the product

Regards,
Mike Lazarus
ACT! Evangelist
GL Computing, Australia
<http://about.me/GLComputing>
<http://Blog.GLComputing.com.au>
<http://twitter.com/GLComputing>

GL Computing Facebook Page - <http://www.facebook.com/GLComputing>
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