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## Act! History View Peek #Actv16Peek

by [benjamin](#) 06-24-2013 08:19 AM - edited 06-24-2013 08:20 AM

The cornerstone of CRM is the history. What was the last conversation I had with this customer? It doesn't get more basic than that. If your database is nothing more than a list of names and the interactions you had with them, you are getting value. Act! has dozens of ways to automatically or manually generate histories, and with little effort you can be peppering your database with valuable information. But aside from checking last interactions, how can we get value from the history?

Enter the upcoming History List View...

Date	Time	Type	Contact	Company	Result	Regarding	Phone	Email Address
7/29/2010	11:17 AM	Opportunity Won	<a href="#">UR Powerful</a>	Captains of...	Opportunity Won	SC \$2,000.00 Closed - Won	(713) 661-5095	ur@captainsof...
6/30/2010	10:55 AM	Opportunity Won	<a href="#">Silvia Carlini</a>	Hospital de la...	Opportunity Won	Main Office Upgrade \$800.00 Closed - Won	(932) 555-4845	
5/17/2010	1:44 PM	Opportunity Won	<a href="#">Albert Barry</a>	Mercury...	Opportunity Won	Warehouse \$12,000.00 Closed - Won	(303) 555-3278	
5/17/2010	2:00 PM	Opportunity Won	<a href="#">Steve Fleese</a>	Mutthound...	Opportunity Won	New Opportunity \$9,000.00 Closed - Won	(480) 555-2564	
5/17/2010	1:58 PM	Opportunity Won	<a href="#">Steve Fleese</a>	Mutthound...	Opportunity Won	New Opportunity \$12,000.00 Closed - Won	(480) 555-2564	
5/6/2010	4:25 PM	New Opportunity			New Opportunity	A new opportunity called New Opportunity...		
5/6/2010	4:00 PM	Meeting	<a href="#">Suzie Lee</a>	AVB Enterprises	Meeting Held	Demonstration	(623) 898-1022	slee@vbenterpr...
4/18/2010	1:10 PM	Opportunity Won	<a href="#">Silvia Carlini</a>	Hospital de la...	Opportunity Won	South American Facilities \$4,000.00...	(932) 555-4845	
4/18/2010	11:52 AM	New Opportunity	<a href="#">Liz Dittmeier</a>	Brandee's Bakery	New Opportunity	New Opportunity - ACT! Sales Cycle Initial...	(208) 555-2445	
4/14/2010	8:59 PM	New Opportunity	<a href="#">Morgan Kennedy</a>	Coffee Producers...	New Opportunity	New Opportunity - ACT! Sales Cycle Initial...	07 599 11 234	MK@coffeepa.em
3/17/2010	12:17 PM	New Opportunity	<a href="#">UR Powerful</a>	Captains of...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(713) 661-5095	ur@captainsof...
2/18/2010	2:06 PM	New Opportunity	<a href="#">Ella Harrison</a>	Harrison &...	New Opportunity	SC - ACT! Sales Cycle Sales Fulfillment...	0141 373282	
1/5/2010	3:48 PM	New Opportunity	<a href="#">Steve Fleese</a>	Mutthound...	New Opportunity	SC - ACT! Sales Cycle Negotiation 65%	(480) 555-2564	
1/4/2010	3:00 PM	New Opportunity	<a href="#">Steve Fleese</a>	Mutthound...	New Opportunity	New Opportunity - ACT! Sales Cycle Initial...	(480) 555-2564	
1/2/2010	2:58 PM	New Opportunity	<a href="#">Steve Fleese</a>	Mutthound...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(480) 555-2564	
12/17/2009	2:47 PM	New Opportunity	<a href="#">Albert Barry</a>	Mercury...	New Opportunity	New Opportunity - ACT! Sales Cycle Initial...	(303) 555-3278	
12/17/2009	2:46 PM	New Opportunity	<a href="#">Albert Barry</a>	Mercury...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(303) 555-3278	
12/17/2009	2:34 PM	New Opportunity	<a href="#">George Bailey</a>	Liberty Savings &...	New Opportunity	NY Operations - ACT! Sales Cycle Initial...	315-568-6700	george.bailey@lb...
12/17/2009	2:04 PM	New Opportunity	<a href="#">Todd Hornsby</a>	Harbor Lights...	New Opportunity	SC for Restaurant - ACT! Sales Cycle...	(757) 555-1221	
11/27/2009	11:00 AM	Opportunity Won	<a href="#">Gavin Dillerstone</a>	Ace Pet Store...	Opportunity Won	Oregon Franchises \$12,000.00 Closed...	(423) 555-1221	
11/18/2009	2:10 PM	New Opportunity	<a href="#">Silvia Carlini</a>	Hospital de la...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(932) 555-4845	
11/16/2009	2:22 PM	New Opportunity	<a href="#">Bill Craia</a>	KKGS Radio	New Opportunity	New Opportunity - ACT! Sales Cycle...	(480) 555-2146	
11/14/2009	9:31 PM	Opportunity...	<a href="#">Claire Haldane</a>	E D Enterprises	Opportunity...	Upgrade - ACT! Sales Cycle Negotiation...	0191 937983	
10/30/2009	3:59 AM	New Opportunity	<a href="#">Chris Burn</a>	County Tennis...	New Opportunity	UK - ACT! Sales Cycle Needs Assessment...	0191 385643	
10/30/2009	3:41 AM	New Opportunity	<a href="#">Gavin Dillerstone</a>	Ace Pet Store...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(423) 555-1221	
10/30/2009	3:36 AM	New Opportunity	<a href="#">Andy Harrison</a>	A1 Services	New Opportunity	Upgrade for Blackpool - ACT! Sales Cycle...	0174 287623	
10/30/2009	3:35 AM	New Opportunity	<a href="#">Andy Harrison</a>	A1 Services	New Opportunity	Station Road Facilities - ACT! Sales Cycle...	0174 287623	
10/30/2009	3:34 AM	New Opportunity	<a href="#">Andy Harrison</a>	A1 Services	New Opportunity	SC for UK Offices - ACT! Sales Cycle...	0174 287623	
10/30/2009	3:30 AM	New Opportunity	<a href="#">Andy Harrison</a>	A1 Services	New Opportunity	Spare Parts - ACT! Sales Cycle Needs...	0174 287623	
10/30/2009	3:19 AM	New Opportunity	<a href="#">Dr. Dieter Brock</a>	Brock Lathers...	New Opportunity	New Opportunity - ACT! Sales Cycle...	(879) 923-43	dbrock@cppt.co...

From this easy to access view, I can quickly filter date ranges, types, users, and even keywords.

Find me all the New Opportunities created between June and August for my key product? *Simple.*

Compare the number of calls Jim and Jason made last week regarding our sales promotion? *Easy.*

Export this to Excel to begin a pivot table that supercharges your data? *Why not.*

Use this to create a lookup so you can send an email, edit a field, or schedule a call? *Absolutely.*

See it in action below.

<http://screencast.com/t/KIOF926JMI>

How would this new feature make your life easier?

Benjamin Lederer  
Product Manager for Act!

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by [gleo](#) on 06-24-2013 10:44 PM

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This feature will be an excellent complement to the History report function of ACT!'s own report writer which has significant limitations. It will allow users who have little or no report customisation skills to get the precise data they are looking for. Reference in the Reports List area of ACT! to sample History List views would assist the users and direct them to history List where appropriate.

Basic step by step videos of sample data mining and filtering would be useful.

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by  [Jeff\\_Granger](#) on 06-25-2013 05:54 AM

I wonder who's brilliant idea this was?

<http://community.act.com/t5/Share-Your-Ideas/History-List-View/idi-p/101607>

<blush>

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by  [benhamilton](#) on 06-25-2013 07:09 PM

You're ahead of the curve Jeff. Ahead of your time. However it looks like this will happen in your own life time 😊


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by  [kquigley](#) on 06-30-2013 05:32 AM

I like this feature a lot, and I think it will be of tremendous value to people that have reporting obligations like CFP's and real estate agents, but I was quite disappointed this feature wasn't available within the contact view or group view. For it to be truly powerful, an ACT user should only have to look up a client or group, click on the History tab, and click Export to Excel.

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