Deep Dive – What's new in Act! v22

Act! v22 brings you the latest generation of the Act! software. This release also encompasses numerous improvements to enhance the user experience of Act! no matter where it has been deployed, whether than be via desktop, web or cloud.

Act! v22 delivers the features and improvements detailed below:

All-New Customer Console

A key part of the Act! v22 release is the addition of an all-new Customer Console that showcases a hub of information to start your day quickly, make quick decisions and navigate throughout the product more efficiently. This feature includes an out of the box dashboard, getting started information, access to import and upload data and the ability to completely personalize the layout of this view per the user's needs.

- Evolving from a personalized dashboard to a user's hub & navigation console for all things Act! emphasizing personalization & enhancing productivity.
- All-new customer console & hub for key information driving actionable insight.
- New out-of-the-box content giving users ability to see upcoming tasks, their pipeline & more.
- Ability to personalize & tailor the experience to individual needs.

Trial Getting Started Menu (US Trial Accounts ONLY)

Whenever you sign up for a free trial of Act!, you will now experience the new Getting Started menu. This is a brand new feature that has been specifically designed to make sure that onboarding with Act! is as easy and smooth an experience as possible.

The purpose of this menu is to quickly and easily walk you through using the Act! product. It advises which tasks you should perform immediately, such as importing any existing contacts, and shows you exactly how to perform these steps. It also provides a list of commonly performed tasks in Act! designed to familiarize you in working within some of the key areas of the program.

- All-new getting started menu provides new customers a very easy and smooth onboarding experience.
- Automatic prompts encourage customers to work through a list of tasks vital for new customers such as importing their current contacts, or getting started with Marketing Automation.

- Screen prompts, text-boxes, video tutorial links and smart tips provide useful information to the customer as and when they need it.

Marketing Automation - User Experience & Navigation Improvements

To help improve navigation of Marketing Automation functionality, we have relocated the navigation menu to the top of the view. This improves on the previous ‘double-stacked’ side menus, and also provides more screen real estate for users as they build out their templates and workflows.

- Updated Marketing Automation navigation.
- New design and layout increases screen real estate and improves navigation.

Marketing Automation - Default Scoring Profile

To help users quickly get started with scoring profiles, we have added a new default scoring profile to AMA. This applies to all AMA accounts, and will map to a new AMA Score field in Act!.

- New contact field entitled "AMA Score" added to the database and can be added to existing contact layouts.
- A new scoring profile called "Default Scoring Rule" has been added to AMA accessible by going to the Admin section and choosing Scoring.
- New default group called "Scored Leads" has been created which automatically groups together contacts that have an AMA score greater than zero.

Marketing Automation Tab - Send Email (Currently available in web client only)

To further enhance the functionality of AMA, a new contact tab has been added which allows users to perform several Marketing Automation tasks. On the first section of this new tab, users can compose and send an email to the contact, which is sent and tracked by AMA. Users can also quickly import content from existing WYSIWYG emails, for messages which they may want to send frequently. This feature allows users to send short, tracked emails quickly without needing to create a full drip marketing campaign.

- Send emails to your contacts without any need for an additional email client.
- Sent emails will be tracked through AMA, even without setting up a campaign.

- Import content from existing WYSIWYG email templates to save time and effort when creating your emails.

Marketing Automation Tab - Campaigns (Currently available in web client only)

On the second section of the new Marketing Automation tab, users can quickly add a contact to an existing campaign, and can view details of campaigns the contact is already included in, preventing the need to amend any existing groups or perform complex workarounds.

- Add a contact to any existing drip marketing campaign right from their contact record.
- No need to amend any groups to include additional one-off contacts.
- Quickly and easily view details of any campaigns a contact is currently involved in directly from their contact record.

Marketing Automation Tab - Scores (Currently available in web client only)

On the third section of the new Marketing Automation tab, users can quickly view scoring profile data for the selected contact.

- See a list of all scoring profiles that have affected the selected contact and what those scores are.
- Easily compare how engaged an individual contact has been based on multiple scoring profiles.

Marketing Automation - New Grid View

To help customers work effectively when they have accumulated a lot of Marketing Automation content, we have added new Grid views to the Campaigns, Templates and Landing Pages views. This allows users to view more items on screen, and easily search for the content they need.

- Switch easily between classic list view and new grid view.
- Available in the Campaigns, Templates and Landing Pages views.
- Makes searching through content quicker and easier displaying more content on each screen.

Marketing Automation - Send to Custom Tables Groups

Act! v22 allows you to create groups based on custom table data (see below for further explanation of this new feature). Because Marketing Automation campaigns use groups to determine which contacts will be included, it is now possible to create drip marketing campaigns for custom tables groups.

- Usable within current databases that have custom tables data.
- Requires contacts to be linked to custom tables data as it is always contacts that are entered into a drip marketing campaign.

Act! Insight - Drill Down on Custom Charts

To further enhance the functionality of Act! Insight, we have added the ability to drill down on custom created charts. For example, if you click on a column or bar in a custom chart based around contact or opportunity fields, it will open the data in a list view.

- Easily see more detailed data when creating custom charts simply by clicking on bars or columns.
- Click records within the drill down list to navigate directly to the details view of the specific record.
- Works with custom charts built around contact or opportunity fields.

Custom Tables - Create Groups

In order to integrate custom tables modules more fully into Act!, we have now provided the functionality to create groups based on custom tables data. This means that if you have any contact records linked to custom tables data, you can now create dynamic group criteria based on this custom tables data, making the feature that much more powerful and flexible. This means as well that we now have the ability to create advanced queries based on customs tables data which will be discussed further below.

- Works with existing custom tables and any data you might already have in your database.
- Dynamic groups can be created based around custom tables data, meaning that any time any of your contacts have that matching criteria, they will automatically be added to the group.

- Groups in Act! are always based around contacts, therefore a group based around custom tables data must have linked contact records, then those contacts will appear in the group.

Custom Tables - Create Advanced Queries

As part of the improvements made to the custom tables feature in Act!, we have introduced the ability to create advanced queries based around custom table data. This can be accessed in the exact same way as you would expect (Lookup > Advanced > Advanced Query).

- Select from any of your custom tables and their associated fields.
- Queries can be saved and used to create dynamic group criteria as normal.
- This feature will allow you to search for contacts that have an associated custom table record. Remember that if you want to search purely for custom table records regardless of whether they have linked contacts or not, you can do so by going to Lookup > Custom Tables.

Custom Tables - Set Layouts by User

One feature that has been requested often with regard to custom tables is the ability to swap between layouts easily. This is now possible with each individual user able to select the layout that they want to use without affecting any of their colleagues.

- Open up a custom table record and choose from a drop-down list which layout you want to use.
- After selecting and applying the layout, this will only affect the currently logged in Act! user, any other user may log in and perform the same steps themselves.

Custom Tables - Improved Parent/Child Table Setup

Creating and managing parent/child table relationships has been made easier in order to encourage users to explore this feature.

- The first custom table you create no longer has an option for child table settings. This is because the setting cannot be used until you have at least two custom tables, so it simplifies the process and helps avoid confusion.
- When creating additional custom tables (or editing a table if you have more than one), the child table settings dialog will show and contains new messaging advising that a parent link must be configured.

- When a parent/child relationship is set up, the child table will be pre-selected in the child table settings dialog.

Custom Tables - Control Tab Order

Previously when you created multiple custom tables and added them to the navigation bar, they would appear in the order in which you created the tables. This can now be controlled in v22.

- Select Custom Tables > Manage Custom Tables and click Reorder Custom Tables.

Custom Tables - Mail Merge Current Date or Time

Whenever you create a custom table in Act! you can perform a mail merge using data from your custom tables records. It is now possible to include today's date or the current time on your merged documents.

- Go to Custom Tables > Manage Templates, then access the Insert Merge Field dialog. Under the Record Type dropdown, Document Variables can be selected and this now includes Today's Date and Today's Time.

Web Client Layout - Enhanced Formatting Tools

With each new release we always strive to bring the web client closer and closer in terms of functionality to the desktop client. One of the most commonly requested features for improvement was the layout designer. The layout designer in the web client has now been significantly improved and includes much of the functionality that was missing previously.

- New formatting menu options available include:
  - Align
  - Make Same Size
  - Horizontal Spacing
  - Vertical Spacing
  - Centre
- New option for Align to Grid now appears in the Grid menu.

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