

A Better ACT!

by Joe Stoddard

Most contractors who use Act contact management software have been frustrated to find that, among the many third-party add-ins on the market, few apply to the construction industry. Until now, that is. Remodeler

Norm Seff and computer reseller Dave Goldsmith have teamed up to form a company called 9 Dots, and have created a unique set of enhancements specifically designed for building contractors and remodelers. Called

BetterAct, the package inserts itself as a "layout" in Act 4.0 for Windows (no Mac version is planned), so that other Act databases (for other businesses, for example, or personal contacts) remain unaffected.

The screenshot shows the BetterAct software interface. The top half displays 'Contact Info' for 'PC Hardware & Software, Inc.' with fields for Company, Contact (Dave Goldsmith), Title/Spouse (Lisa Goldstein), Address (934 Olmstead Rd., Baltimore, MD 21208-4756), and various phone numbers. The bottom half displays the 'Lead Tracking' tab for a lead named 'John Smith'. It includes a 'Overall Rating' of 69, a 'Lead Source' of 'Direct Mail', and various other details like 'Ownership' (11yr), 'How Soon' (90d), 'Project Type' (Bath), 'Service Type' (D/B), 'Budget?' (25k), 'Single Source?' (y), and 'Decision Makers' (H&W). The interface has a split-screen layout with a menu bar at the top and a status bar at the bottom.

Figure 1. BetterAct uses the familiar split screen. The top half displays basic contact information, while the bottom half displays standard Act tabs plus three new construction-specific tabs provided by the add-in software — Lead Tracking, Project Info, and Document Management. The Lead Tracking tab displayed here provides a numerical rating system to separate serious prospects from "tire kickers."

The screenshot shows the 'Project Info' tab in the BetterAct software. It includes fields for Address (934 Olmstead Rd., Baltimore, MD 21208), Project Type (Whole House), Project Description (To furnish and install all necessary items for project described in contract), Client Acct.# (34567-90), Build Permits# (204656), Comments (See attached plans), Start Date (12/18/98), Completion Date, Proposal# (\$245,670.00), Create Date (10/25/98), Last Meeting, and Last Reach. The interface has a split-screen layout with a menu bar at the top and a status bar at the bottom.

Figure 2. The second custom tab, labeled Project Info, provides a place to enter additional information, such as permit numbers, directions to the site, and notes about the owner.

Start-to-Finish Management

BetterAct is designed to help contractors track prospects and projects from cradle to grave. The software modifies the familiar split-screen Act interface, adding fields and tabbed windows such as "lead tracking," "project info," and "document management," specific to building and remodeling (see Figure 1). From a prospective client's first phone call, BetterAct's customized data entry screens provide a quick and easy way to enter information about the caller and his or her project.

Rating prospects. Too many contractors fail to realize they're on a wild goose chase until they've spent several evenings and weekends working up a dead-end quote for a "tire-kicking" prospect. BetterAct's solution is the Lead Tracking screen, which provides prompt prompts for key information, such as who referred the job and when the work must be completed, taking the guesswork out of rating prospects. The grand totals of the ratings for all responses can be used to make sure that the most promising leads get the most attention from the sales department.

Once a project is signed, BetterAct provides a separate Project Info screen to hold information about permit numbers, directions to the site, and notes about the owner (Figure 2).

Automatic Documents

One of the most compelling features of BetterAct is its collection of ready-made construction documents.

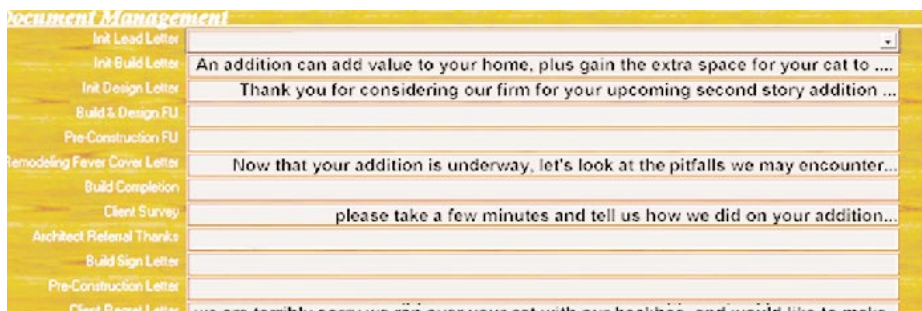


Figure 3. The Document Management tab allows you to create and organize custom documents. A short paragraph typed into the field will automatically be inserted in the document that matches the field name. Later, the same information can be used as a record of what was sent to a particular customer.

Contact names and addresses automatically merge into document templates ranging from initial design letters and proposals to contracts, change-of-work orders, and follow-up correspondence — practically any document a contractor would need. BetterAct even includes crisis-management documents: One called “Remodeling Fever” is designed to temper client expectations by telling the truth about remodeling (it’s dusty, dirty, and will probably take longer and cost more than expected); another, called a “regret letter,” offers apologies for a variety of remodeling sins.

Document management. BetterAct doesn’t simply tack a list of documents onto each contact; instead, it cleverly provides each document with its own custom field in the interface (Figure 3). When any document is created, the corresponding field provides room for a short descriptive paragraph (up to 244 characters) that is automatically embed-

ded in the document. This not only helps identify document contents, but conveniently provides a standardized introductory sentence.

The document management screen also serves as a way to keep track of documents sent to a customer, long after a project is complete. This feature should prove handy to anyone who has ever torn apart the office searching for a mis-filed letter.

“SmartQueries” and Reports

Act ships with a report generator as well as a custom lookup feature called “SmartQuery,” both of which can sort and summarize contact information. Unfortunately, the complicated formulas these advanced features require make them difficult to use. BetterAct simplifies this special programming by providing pre-defined macros that place “buttons” for reports and lookups in plain view on the screen. For example, a one-button report might search

for and summarize all records of sales leads for a given week; similarly, a one-button lookup might produce a list of all leads for a given month by order of priority.

Links to QuickBooks and PalmPilot

BetterAct ships with a separate utility called QuickAct, which facilitates the passing of information from Act 4.x to QuickBooks Pro. When installed, the utility runs in the Win95 system tray (the area in the lower right-hand corner of the screen that displays startup programs). Basic name, address, and phone records created in Act are available to QuickBooks Pro, but not the other way around.

BetterAct also makes it a little easier for PalmPilot users to synch with their Act database. For this purpose, the software provides custom maps of four fields: Title/Spouse, Project Address, Project Directions, and Project Comments.

Hard Act to Follow

Altogether, the BetterAct enhancements represent hundreds of hours of effort to customize Act into a powerhouse for remodelers and builders. If you use Act for Windows to manage your construction business, this is a “must have” add-in. The CD-ROM including BetterAct and QuickAct, plus documentation, is available for \$49; bundled with a series of templates for Microsoft Project, it sells for \$69.

For more information, contact 9 Dots (934 Olmstead Rd., Baltimore, MD 21208; 800/982-2785; www.9dots.com). 