TopLine Dash

for Act!

A dashboard for driving sales results!

Prioritize sales effort.
Assess sales performance.
Predict sales results.

Work effectively

- **Centralize and organize** all key activities, opportunities, histories, notes, custom tables, companies and contacts in one view.
- **Manage your database —** Navigate easily from TopLine Dash directly into Act! to make edits.
- **Easily organize your dashboards** in new folder structure. Arrange by favorites, teams, business functions and more.

Analyze interactively

- **Compare, analyze and drill down** on activities, histories, opportunities, custom tables, products and queries or graphs. Integrated with TopLine Designer for custom tables.
- **Monitor and quantify** sales performance with key performance indicator (KPI) statistics. Calculate sum and average.
- Easily create **multiple-table queries** with SQL statement auto generation.
- Build **exception reports** and identify neglected accounts.
- **Set targets** for activity and opportunity levels to identify gaps and adjust sales plans.
- Choose from **many templates** and **easily customize** your own dashboards using our Dashboard Wizard. Drag and drop panels and fields. Choose your color palette.

Report instantly

- **Improved PDF printing** with crisper output and header/ footer content.
- **Share your dashboard** as a report in PDF format.
- **Export** any list to Microsoft Excel.
- **Automate your dashboard reporting** with TopLine Dash Alerts. Refer to TopLine Dash Alerts datasheet for additional information.

Simple to use. Immediate impact.

Update Act! and analyze sales activities and results from a single customizable view and automatically share powerful reports.

Pricing

TopLine Dash Manager .... $149 per user
Upgrade .... $74.50 per user
View and report on data for all users

TopLine Dash Personal .... $79 per user
Upgrade .... $39.50 per user
View and report on your own data only

TopLine Dash Alerts .... $279 per user
Upgrade .... $139.50 per user
Dash Manager & Alerts Professional bundle

TopLine Designer Plus .... $199 per user
Upgrade .... $99.50 per user
Dash Manager & Designer bundle

TopLine Server Suite .... $299 each
Upgrade .... $149.50 each
Dash Manager, Alerts Professional & Designer bundle

Quantity discounts are available on a per-order basis and do not apply to upgrades. See estore for details.

"Dashboards provide easy-to-use views that help sales people increase productivity."

TopLine Results

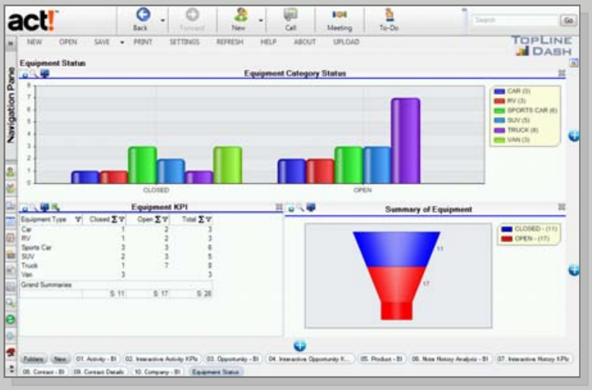
800-880-1960 **www.toplineresults.com** **info@toplineresults.com**

TopLine Dash

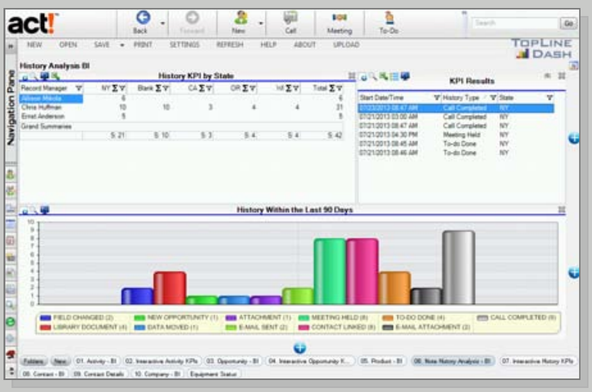
For Act!

"TopLine add-ons make Act! a real business solution!"

Product Features



Equipment Status Report with KPI



History Analysis Report with KPI

TopLine Dash

Dashboard Wizard: Quickly set up your dashboard parameters and filters using our Dashboard Wizard. Organize your dashboards in the folder structure by favorites, teams, business functions and more.

Customizable Views: Add any database fields or custom tables to your list views. Quickly save or reload your favorite dashboards. Copy or drag and drop dashboard panels and columns. Select different users for each panel. Move the legend as needed.

Custom Color Palettes: Select a custom color scheme for graphs and charts. ***New for Act! v16 or later***

Custom Tables: View and graph related custom tables side-by-side in the same view, e.g. projects, tickets and contracts.

Contact Details: Preview an editable contact layout by clicking on any lists of activities, opportunities, queries, histories, notes or products.

Calendar: Simultaneously view and edit multiple calendars.

Activities: Create customized activity lists or drill-down pie or bar graphs.

Opportunities: Create customized opportunity lists or drill-down graphs, auto-calculate counts, gross margins, weighted totals and actual totals. Create follow-up activities directly from your pipeline report.

Contact Lists: List your most important dynamic or ad-hoc group of contacts and edit them.

Histories: View, filter and sort by history types and create history summary drill-down graphs. Right click to email history items.

Products: View your selected products by sales stages, date range in a list or drill-down graph.

Queries: Perform powerful query lists and corresponding graphical views. Easily create multiple-table queries with SQL statement auto-generation.

Filtering and Sorting: Filter and sort by any field in your database.

Interactive: Update the dashboard by selecting filters and sorting on the fly. Update multiple opportunities and activities simultaneously. Create look-ups from your notes, histories, activities, opportunities or custom tables.

Key Performance Indicators (KPIs): View and filter your sales metrics on activities, histories, opportunities, contacts, products and custom tables, e.g., number of calls, emails, quotes, new opportunities and more. Create KPIs from any field in your Act! database including custom fields. Choose between a simple single field KPI or a complex KPI based off two fields. Double click on a KPI cell to drill into the results. ***New for Act! v16 or later***

Sum/total: Sum/total for any numeric or currency field in a list view.

Reporting: Print your favorite dashboard panels as a PDF and share with others. Create read-only dashboards. Email selected histories.

Administrative Dashboard: View the sync panels, group panels and users.

Export to Excel: Export activities, notes, histories, opportunities, contacts and KPI statistics to MS Excel format.

How to buy our Act! add-ons:

To purchase our products or inquire about pricing, visit our estore at https://store.toplineresults.com/ or email us at info@toplineresults.com. Order and download the software directly from our website. You will receive your activation code via email. Download your free 30-day trial today!

TopLine Results Corporation is a customer relationship management (CRM) consulting firm specializing in Act! and Microsoft Dynamics CRM. Our services include add-on development, software sales, implementation, hosting and training. Headquartered in Wisconsin, with offices in Chicago and St. Louis, our mission is to empower companies with customized CRM solutions which increase sales, marketing, customer service and overall business effectiveness.

Easy to install. Easy to update. Easy to use.

Features apply for Act! v16 or later. Some features may not be included in all releases of TopLine Dash and some features may not be functional with every version of Act!. Contact us for questions about compatibility with earlier versions of Act!.