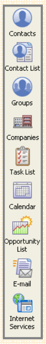
ACT 2009 - Quick Guide

NAVIGATION

When you open ACT it will default to the contact view of the database. Contacts are people. They can be your customers, suppliers, friends and colleagues. Anyone in fact that you want to record their details and your relationship with.

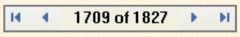


Down the left hand side of the screen will be a row of large icons that take you to different views of the database.

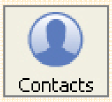
You can customise these buttons by right-clicking on this pane and selecting **Customise**

For example, if you do not use ACT to track sales opportunities, you can drag the Opportunity List icon out of the navigation pane.

Running across the top of the ACT window will be the normal windows menus and icons. To left of the icons is the contact counter.



This shows how many contacts are in the current lookup. You can move through the contacts one at a time by pressing the arrows to the left and the right of the contact counter, or using the PgDn/PgUp keys.



CONTACTS

Add a contact:
1. **Contacts**, **New Contact**
2. Or right-click the mouse and select **New Contact**
3. Or press the **[Insert]** on your keyboard
4. Or Select the New Contact icon from the toolbar

Delete a contact / or contacts:
1. Display the contact or create a lookup of those to be deleted.
2. **Contacts, Delete Contact**
3. Or right-click the mouse and select Delete Contact
4. Or press **[Ctrl + Delete]** on your keyboard.
5. Choose **Delete Contact** or **Delete Lookup**

Duplicate a contact:
1. Display the contact to duplicate
2. **Contacts, Duplicate Contact**
3. Or right-click the mouse and select **Duplicate Contact**
4. Or select the Duplicate Contact Icon
5. Click **Duplicate data from primary fields, OK.**

Add a Secondary Contact:
1. Select the Secondary Contacts tab
2. Click **New Secondary Contact** button
3. Or right-click on the tab and select **New Secondary Contact...**
4. Fill in the data as desired
5. **OK**

CONTACT LIST

The Contact List is a spreadsheet style way of looking at the contacts in your database.

Selecting the Contact List View:
1. **View, Contact List**
2. Or press **F8** on your keyboard
3. Select the **Contact List** button on the Navigation Bar

Sort a Contact List:
1. Click on the column heading you wish to sort
2. This will display the contacts A-Z relative to that field. Clicking again sorts the data Z-A
3. You can see if the data is already sorted as a small triangle will be present next to the field name in the column heading

Add / Remove fields to the Contact List:
1. Right-click within the list view of the contacts and select **Customise Columns...**
2. Or **View, Customise Columns...**
3. To add fields, select them from the list in the left hand column and click >
4. To remove fields, select them from the list in the right hand column and click **<**
5. Use the **Move Up** and **Move Down** buttons to arrange the order of the fields to be displayed in the Contact List view
6. **OK**

(Note this process also works for adding and removing fields from most list based displays. These include the tabs: Notes / History/ Activities etc as well as the Task List View.

Print the Contact List:
1. Right-click on the contact list data and then select **Print Contact List**

Export the Contact List to Excel :
1. **Tools, Export to Excel**

LOOKUPS

One item Lookups:
Many of the common items you will want to lookup (Contact Name, Company Name etc.) can be found under the Lookup menu.

1. Select **Lookup** and then the item you want to lookup, say **Contact**.
2. Enter the name of the contact in the **Search For** box and then **OK**.
3. If only one contact with that name exists, they will be displayed. If more than one contact with that name exists they will all be displayed in the **Contact List** (spreadsheet) view.

A quick way to do a lookup, for any of the fields in your database is to:

1. Click into the desired field, say **Referred By**
2. Then right mouse click and select **Lookup Referred By**.

Multiple item Lookups
If you want to lookup all contacts in London and Manchester...
1. **Lookup**, **City**, "Manchester"
2. You should now see a list of all contacts that are in Manchester
3. **Lookup**, **City**, "London" - now before you press **OK**, ensure that you have also selected **Add to Lookup** from the **For the current lookup** dropdown.
4. You should now see a list of all contacts in Manchester and London

Likewise you can use the For the current lookup dropdown to find all contacts in Manchester that have a surname Smith

1. **Lookup**, **City**, "Manchester"
2. You should now see a list of all contacts that are in Manchester
3. **Lookup**, **Surname**, "Smith" - now before you press **OK**, ensure that you have also selected **Narrow Lookup** from the **For the current lookup** dropdown.
4. You should now see a list of all contacts in Manchester with the surname Smith

Looking up empty fields:
1. Click in the field you are interested in
2. Right-click the mouse and select **Lookup "fieldname"**
3. In the **Search For** section select **Empty Field** and then **OK**

SCHEDULING

The basic activities that ACT lets you track are phone calls, meetings and to-do's. Activities are associated with any contact, including yourself.

To schedule an activity:
1. Lookup the contact
2. **Schedule**, **Call**, **Meeting** or **To-Do**
3. Or, click the appropriate icon on the toolbar
4. Select the start date / time / duration

t 01749 676 888 **w** www.trevorleverconsulting.com **e** sales@trevorleverconsulting.com

ACT 2009 - Quick Guide

5. Select from the dropdown a **Regarding** type or type a new one in.
6. Select **Ring Alarm** if you want to be reminded of the activity.
7. Click the **Details** tab and add any extra information, as required.
8. **OK**

Scheduling icons:

All uncompleted activities can be found in three places:

- In the **Activities** tab for the relevant contact
- In your **Task List**
- In your **Calendar** on the relevant day

To clear an activity:
1. Click the check box to the left of the activity.
2. Select **Results** option
3. Type in details, if desired, of the outcome of the activity.
4. Select **Follow-up...** if you need to schedule another activity as a result of completing this one.
5. **OK**

To modify / change and activity:
1. Double-click the activity
2. Make required changes
3. **OK**

Sometimes you may want to record activities for a contact—but you did not have anything scheduled. For example, they called your office or you met them at a trade-show. Use the **Record History** function for this:

To Record History:
1. Display the relevant contact
2. **Contacts**, **Record History** or
3. Press **[Ctrl+H]** on your keyboard or
4. Display the **History** tab and click the **Record History** icon 
5. Select the activity **Type:**
6. Click the appropriate **Result:**
7. Fill in the **Regarding:** and **Details:**
8. Select **Follow-up...** if you need to schedule another activity as a result of completing this one.
9. **OK**

COMPANIES

Companies are a collection of contacts that work for the same company, department or organisation. When contacts are collected into a company their associated tasks, history, notes etc. are consolidated together in the company view.

To create a company:
1. **Company, New Company** or
2. Select the **Companies** button from the navigation bar and press **[Insert]** on your keyboard
3. Enter the name of the company

To add contacts into a company:
1. Select the **Contacts** tab of the company
2. Select the **Add/Remove Contacts...** button
3. Select the **Contacts...** button to manually add contacts into the company
4. To add contacts, select them from the list in the left hand column and click >
5. **OK, OK**

Alternatively, contacts can be added to companies from the contact view of the database

1. Select the **Group/Companies** tab
2. From the dropdown **Show membership for:** select **Companies and Divisions**
3. Select **Add Contact to Company**
4. Select the appropriate company from the list if the left pane and click >
5. **OK**

GROUPS

Groups are similar to companies, but are used to collect together contacts that have something in common. Perhaps the contacts are all interested in a specific product or are all members of a club or society.

To create a group:
1. **Group, New Group** or
2. Select the **Groups** button from the navigation bar and press **[Insert]** on your keyboard
3. Enter the name of the Group

To add contacts into a Group:
1. Select the **Contacts** tab of the Group
2. Select the **Add/Remove Contacts...** button
3. Select the **Contacts...** button to manually add contacts into the Group
4. To add contacts, select them from the list in the left hand column and click >
5. **OK, OK**

Alternatively, contacts can be added to a Group from the contact view of the database, in a similar way to adding contacts to companies.

1. Select the **Group/Companies** tab
2. From the dropdown **Show membership for:** select **Groups and Subgroups**
3. Select **Add Contact to Group**
4. Select the appropriate Group from the list if the left pane and click >
5. **OK**

CORRESPONDANCE

To write a letter:
1. Display the contact
2. **Write**, **Letter**
3. Type the letter
4. Do a spell check
5. DON'T SAVE
6. **File**, **Print**, **OK**
7. In the **Create History** dialogue fill in the **Regarding:** section
8. Select the **Attach document to history** if you want the letter to be saved and associated with the contact in our database
9. **OK**

To perform a mail merge: This is done in three parts. The first is to create the letter template, then create the lookup or group you want to mail and then do the mail merge

Create a mail merge template:
1. **Write**, **Edit Template**
2. Open the "letter" template
3. Create the mail merge letter and **File**, **Save As** with a new name

Lookup the contacts you want to mail, or create a group that contains these contacts.

To perform the mail-merge:
1. **Write**, **Mail Merge...**
2. **Next>**
3. Select Word Processor
4. **Next>**
5. Browse to find the relevant template
6. **Next>**
7. Choose who to send the letter to (Current Lookup, Selected Group etc),
8. **Next >**
9. **Finish**
10. Review the mail merged letters, make any changes
11. **File**, **Print**.

To print an envelope:
1. **File**, **Print...**
2. Select **Envelopes** in **the Printout type:**
3. Select **Paper Type:** (Note: DL is the envelope size for when you fold A4 paper over on itself twice)
4. **Print**