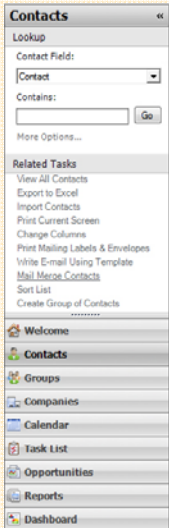


ACT! - Quick Guide

NAVIGATION



Down the left hand side of the ACT! window is the main Navigation Pane that shows a list of different "views" of the database.

The current view is listed at the top: here it is **Contacts**.

You can change the current view by either clicking any of the buttons at the bottom of the Navigation Panel (Groups, Companies etc.) or by selecting **View** from the menu bar and choosing a menu option.

The **View** menu and Navigation Pane are the main two ways of moving around the different parts of the ACT database.

The Navigation Pane can be minimised using the << button and expanded using the >> button.

At the top of the screen will be a row of "Big Buttons" these change dependant upon the current view and are typically set to display the most common commands for that particular view.

Several views (Contacts, Groups, Opportunities...) have a detail view (only looking at one record) or list view (looking at more than one record in a "spreadsheet" type view)

You can toggle between these views using



the **Detail** and **List** buttons that are located to the left of the lookup counter.

The example above 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.

Note: These are *not* unique record ID numbers and will change dependant upon how many records are in the current lookup.

The **Related Tasks** area also displays typical routine tasks that are related to the current view.

Finally above the Big Buttons is the menu strip with the standard windows File, Edit, View options etc.

Contacts

Contacts are people. They can be your customers, suppliers, friends and colleagues. Anyone in fact that you want to record the details and your relationship with.

Add a contact:

1. Select **New** from the Big Buttons, or
2. **C**ontacts, **N**ew Contact, or
3. Right-click the mouse and select **New Contact**, or
4. Press the **[Insert]** on your keyboard

Note: Most common commands have multiple ways of selecting them, as with the example of creating a new contact above. There is no right or wrong way, it's just down to the users preference.

Delete a contact / or contacts:

1. Display the contact or create a lookup of those to be deleted.
2. **C**ontacts, **D**el~~e~~te 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. **C**ontacts, **D**uplicate 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**

Selecting the Contact List View:

1. **V**iew, **C**ontact List
2. Or press **F8** on your keyboard
3. Or 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 **V**iew, **C**ustomise 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. **T**ools, **E**xport to **E**xcel

LOOKUPS

Looking up a single item:

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 **C**ontact.
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.
4. Alternatively, you can use the Lookup section of the Navigation Pane.

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

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

Looking up multiple items:

If you want to lookup all contacts in London and Manchester...

1. **L**ookup, **C**ity, "Manchester"
2. You should now see a list of all contacts that are in Manchester
3. **L**ookup, **C**ity, "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. **L**ookup, **C**ity, "Manchester"
2. You should now see a list of all contacts that are in Manchester



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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. Or, select **NEW** Big Button dropdown and then the appropriate activity.
5. Select the start date / time / duration
6. Select from the dropdown a **Regarding** type or type a new one in.
7. Select **Ring Alarm** if you want to be reminded of the activity.
8. Click the **Details** tab and add any extra information, as required.
9. **OK**

Uncompleted activities can be found in three different views:

- 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**
 3. Or, press the **HISTORY** Big Button
 4. Or, press **[Ctrl+H]** on your keyboard
 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 are a collection of contacts that

Companies

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 Pane and press **[Insert]** on your keyboard
3. Or, the **NEW** Big Button
4. 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 are similar to companies, but are

Groups

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 Pane and press **[Insert]** on your keyboard
3. Or, press the **NEW** Big Button
4. 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. Write 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 write an email:

1. Display the contact
2. Select the **Write Email** Big Button
3. A new email is created with the To: filled in with the contact's email address (if it exists, otherwise the To: is left empty)
4. Write the email
5. Press **SEND**

Note: Copies of the emails sent to your ACT contacts may be stored in the History Tab. This depends upon how your system has been set up. To change / review your settings go to Tools, Preferences, Email, Email system set-up.