ACT! by Sage 2006
User's Guide

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Printed in the United States of America.

10 9 8 7 6 5 4 3 2 1

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Introduction

Introduction

Welcome to ACT! by Sage 2006, the #1 contact and customer manager, which will help you:

- Organize your data for quick and easy access to customer information.
- Manage and grow business relationships.
- Manage and prioritize your tasks.
- Forecast and track opportunities.
- Centralize customer information securely.

ACT! automatically notifies you when an update of the program is available, so you are always using the latest technology.

ACT! 2006 is designed for individuals and workgroups up to 10 users and runs on Microsoft® SQL Server 2000 Desktop Engine (MSDE).

This introduction tells you where you can learn about ACT! and how to use the demonstration database. It also introduces the scenario used throughout the User's Guide.

Learning About ACT!

Several sources of information can help you learn how to use ACT!.

***Start Here* guide** Explains how to install the software, register and activate ACT!, and convert and upgrade existing ACT! databases to this version of ACT!.

User's Guide Explains how to use the features of ACT!. The *User's Guide* includes an overview of basic tasks and steps for doing them.

The *User's Guide* also contains real-world scenarios based on the sample users and contact information in the demonstration database installed with ACT!. These scenarios will help you understand how to use ACT! to manage your customer relationships and increase your productivity. For more information, see **"Introducing the User's Guide Scenario."**

Additionally, the *User's Guide* directs you to Help topics to find more information about ACT! features. For example, you may need more information about how to identify the contact information you want to synchronize. You read the *User's Guide* and see a table like the one that follows, which lists the relevant topics in the online Help.

See the following topics in the online Help.
Resetting subscription lists
Understanding subscription lists

This *User's Guide* is available as a printed book and as a .pdf document from the Help menu under Online Manuals.

Online Help System The Help system contains all the information and procedures for using ACT!. Use the Contents, Index, and Search tabs of the Help system to find the information you need.

To access the online Help system

- From the **Help** menu, click **Help Topics**.

  - or -

  From most windows or dialog boxes, press F1.

When you open Help, the ACT! window resizes so that you can view it and Help at the same time. When you change to any view listed on the ACT! navigation bar (Contacts, Groups, Opportunity List, and so on), the overview Help topic for that view appears automatically.

You can resize the ACT! window while you are working with Help or when you close Help.

Other Resources There are other related resources for information, such as:

- **Feature Tours**: Explain ACT! customization, groups and companies, and opportunity tracking. Another tour walks you through the installation of ACT! Link for Palm OS® and ACT! Link for Pocket PC. You can access these tours from the CD Browser or Help menu.
- **ACT! Quick Reference Card**: Provides tips for navigating ACT!, using tools, building your database, scheduling activities and tasks, working with e-mail, and customizing ACT!. Besides the ACT! Quick Reference Card included with the package, you can also access it from the CD Browser and from the Help menu under Online Manuals.

- **Knowledge Base Articles**: Provide access to ACT!'s Knowledge Center Web site. The Knowledge Center contains Frequently Asked Questions (FAQs) and Knowledge Base technical documents to answer your questions for all ACT! products. To access the articles, from the Help menu, point to Service and Support, and then click Knowledge Base Articles.
- **Experimenting on your own**: There may be other ways to perform a task besides those given in the *User's Guide* and online Help. For example, the steps in the *User's Guide* may direct you to use a toolbar button, but you might also be able to select a menu command. Experiment with the software on your own to find the method that works best for you.

If You Are New to ACT!: The Demonstration Database

You may want to practice entering data using the demonstration database, ACT8Demo, installed with ACT!. This database contains sample user, contact, company, and group records and scheduled activities. Chris Huffman is the Administrator user for the demonstration database. (User roles, such as Administrator, are explained in **Chapter 32, "Setting Up Users."**)

To access the demonstration database

1. Open ACT!.
2. On the toolbar, click the **Open Database** tool.

   By default, the first time a new user opens ACT!, the location path is set to the ACT8Demo file. For users who upgrade from another version, the database location depends on their preferences.
3. Double-click **ACT8Demo.pad**.

For more information about PAD files, see **Chapter 1, "Getting Started with ACT!."**

Introducing the *User's Guide* Scenario

The following scenario is the basis for examples throughout this guide. This scenario uses the user and contact records found in the demonstration database.

Scenario

Chris Huffman owns a gourmet gift items company, dealing in gift baskets, chocolates, and coffees. Chris has several sales and office employees. Business is growing, and Chris and his team need a better way to manage day-to-day tasks, customer and vendor information, and opportunities.

On a typical day, Chris and his sales team review products with vendors, place customer orders, and make appointments with potential buyers.

Chris and his team want a tool that allows them to:

- View all information, such as names, phone numbers, addresses, and Web sites, about the people they do business with.
- Schedule appointments with people and easily see daily appointments and tasks.
- Keep a history of orders, notes about customers, and other important information.
- Track and forecast opportunities.
- Communicate by e-mail, fax, or letter to one contact or to a group of contacts.
- Run contact, opportunity, and other reports.

Chris' company currently uses Microsoft Outlook for scheduling and tracks sales information using Microsoft Excel, but he would like to have all contact and scheduling information in one place. Chris needs one system that will help him manage his business and improve his customer relations. Chris needs ACT!.

Setting Up ACT!

Chapter 1
Getting Started with ACT!

To start using ACT!, you must do the following:

- Create a database to store your contact information, including names, addresses, telephone numbers, activities, histories, and so on.
- Add users. This is necessary only if you want other people to use the database.

Note: If you are upgrading from a previous version of ACT!, refer to the *Start Here* for database conversion information.

Creating Databases

You can create a database using the New Database tool, the New command from the File menu, or the ACT! QuickStart Wizard.

The first time you create a database, the user name you supply becomes the first contact record. This contact record is the owner of the database and is given the Administrator role. In most cases, you want to enter your name as the user name. You can enter your address, telephone number, and other information into this contact record. This contact record becomes your *My Record*. In a multiuser database, each user has a My Record. ACT! uses your My Record information when addressing mail merges and scheduling activities or tasks for you.

To create a database using the New Database tool

1. Open ACT!.
2. Click **New Database**.
3. In the **New Database** dialog box, read the instructions, and then enter a name and location for the new database. You can click the browse (...) button to navigate to the location.
4. (Optional) To share the database, select the **Share this database with other users** check box.
5. Type your name as the user name for the database. This step creates your My Record.

6. (Optional) Type a password for the database, and then type the password again to confirm it.
7. Click **OK**.

When you create a database, ACT! also creates a file with a .pad extension that points to the database. The .pad file is updated when a database is moved using the Backup and Restore commands. You should have only one .pad file per database. If you share the database with other users, distribute shortcuts to the .pad file to all users.

Adding Users: Sharing the Database with Others

When you create the database, you are automatically set up as the Administrator user. If other people need to use the database, add them as users and assign security roles. See Chapter 32, "Setting Up Users."

If you are adding other users, to help you understand record ownership and access, see Chapter 33, "The ACT! Security Model."

Chapter 2
Setting Preferences for How ACT! Works

You can set preferences for many features in ACT! so that it fits the way you work. You access the Preferences dialog box from the Tools menu. The Preferences dialog box has these tabs:

- General
- Colors & Fonts
- Calendar & Scheduling
- E-mail
- Communication
- Startup

In this chapter, you will learn to:

- Set a general preference for how salutations display for contacts.
- Customize colors and fonts.
- Set calendar and scheduling preferences.
- Set e-mail preferences.
- Use the Communication tab to specify a word processor.
- Set startup preferences.

Setting General Preferences

General preferences let you specify settings for your database, such as how quotes display, how salutations display on your contact records, whether checking for duplicate records is enabled or disabled, and where personal files associated with ACT! are stored.

> **Note:** Some preferences on the General tab can only be set by Administrator and Manager users.

The following steps show how to set up a default salutation preference for contacts. The salutation is used when writing a letter or performing a mail merge.

To set salutation preferences

1. From the **Tools** menu, click **Preferences**.
2. On the **General** tab, under **Names**, click **Salutation Preferences**.

3. Select an option.

   For example, to have the salutation contain both the contact's first name and last name, select User first and last names only.

4. Click **OK**.

See the following topics in the online Help.

Customizing name prefixes and suffixes
Enabling or disabling duplicate contact checking
Setting storage locations for personal files
Setting quote preferences
Setting the option to allow or disallow history editing
Setting the option to display country code in phone fields

Setting Colors and Fonts Preferences

Colors and fonts preferences allow you to customize the appearance of your database. You can change the colors and fonts for lists, tabs, and calendars. You must select the colors and fonts for one item at a time.

The following task describes how to customize the colors and fonts for the Group List.

To customize the colors and fonts for the Group List

1. From the **Tools** menu, click **Preferences**.
2. Click the **Colors & Fonts** tab, and then from the **Customize** list, select **Group List**.
3. To customize the font, click **Font**.
   a. In the **Font** dialog box, select the font, style, and size.
   b. Click **OK**.
4. On the **Colors & Fonts** tab, under **Appearance**, select the text color and background color. The Sample box shows the selected text color and background color.
5. To display grid lines on the Group List, select **Show grid lines**.
6. Click **OK**.

Repeat these steps to customize the other views, tabs, and calendars that display in the Customize list.

Setting Calendar and Scheduling Preferences

You can set options for activities and calendars that make it easier to manage and schedule activities. For example, you can set a preference to make meetings default to one-hour duration.

To set scheduling and calendar preferences

1. From the **Tools** menu, click **Preferences**, and then click the **Calendar & Scheduling** tab.
2. To set options for calendars, click **Calendar Preferences**.

   - or -

   To set options for scheduling activities, click **Scheduling Preferences**.
3. Complete the necessary fields.

See the following topics in the online Help.

Setting preferences for calendars
Setting scheduling preferences for activities

Setting E-mail Preferences

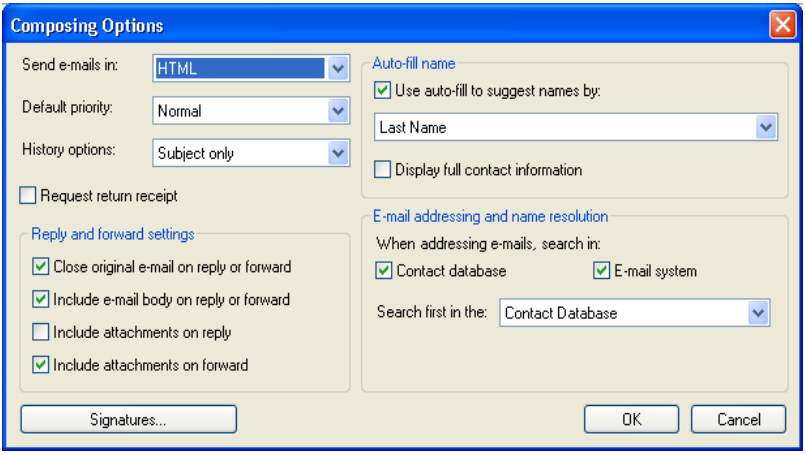
When you set e-mail preferences, you specify how your e-mail system operates by doing the following:

- Defining composing options, such as standard text and a signature.
- Choosing the default folder for saving messages.
- Choosing the sound that notifies you of new messages.
- Establishing rules for handling attachments.

To set e-mail preferences

1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
2. To specify message settings and create or modify an e-mail signature, click **Composing Options**.
   a. In the **Composing Options** dialog box, select options as shown in the illustration.
   b. To create or modify an e-mail signature, click **Signatures**.

c. Click **OK** to save your options.



3. Under **Folder settings** on the **E-mail** tab, select one or more of the folder action options.
4. Under **Attaching e-mails to contacts**, select an option to define how files attached to a message are handled when attaching the message to a contact record.
5. Click **OK**.

Note: You can override some preferences when you send individual e-mail messages.

When you finish setting your e-mail preferences, check your My Record to make sure you have entered an e-mail address.

See the following topics in the online Help.

Setting auto-fill name options
Setting default options when attaching e-mail messages to contacts
Setting e-mail addressing and name resolution options
Setting reply and forward options
Setting up a default history option for e-mail
Setting up new e-mail notification

Setting Communication Preferences

Using communication preferences, you specify the word processing and fax software you want to use with ACT! and set up fax options. You can also set up options relating to printing preferences and set up the Dialer.

The following steps show how to select a word processor to use with ACT!.

To select a word processor

1. From the **Tools** menu, click **Preferences**, and then click the **Communication** tab.
2. From the **Word processor** list, select the word processor you want to use, and then click **OK**.

See the following topics in the online Help.

Setting Quick Print preferences
Setting spelling preferences
Setting up the Dialer
Setting up fax software for ACT!

Setting Startup Preferences

You can specify what happens and displays when you start ACT! by setting preferences on the Startup tab of the Preferences dialog box.

For example, you can:

- Specify a database to open at startup.
- Set record access for new contacts, groups, and opportunities.
- Automatically link new contacts to a company record.
- Automatically check for updates.

See the following topics in the online Help.

Checking for ACT! updates
Opening databases
Setting options for contact, group, and opportunity records
Setting startup preferences

Chapter 3
Working with Contacts

The central element of ACT! is the contact. A *contact* is a customer, business associate, friend, or anyone that you need to keep track of. All contact information—name, address, phone number, employer, and so on—makes up the contact record, which is stored in the ACT! database. Everything you do in ACT! relates to a contact.

You can enter all of the information you keep in files or other storage locations into ACT! so that you can easily access it. Besides names, addresses, and phone numbers, you might want to add notes and sales data and attach documents to a contact's record.

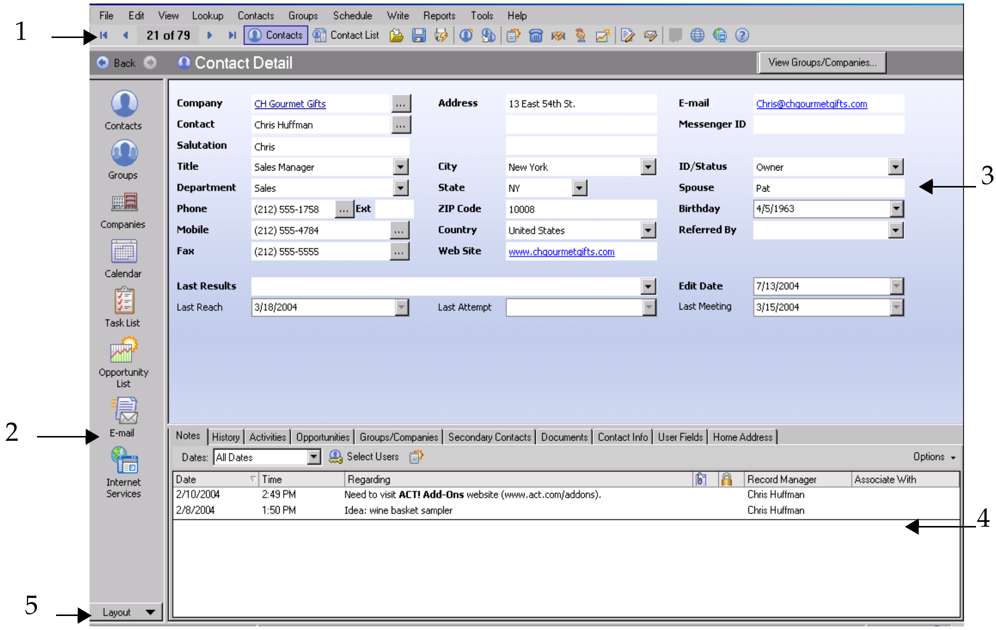
In this chapter, you will become familiar with the Contact Detail view and learn how to:

- Enter contact information.
- Attach files to contact records.
- Add secondary contacts.
- Get driving directions for contact locations.
- Attach Web pages to contact records.

Contact Detail View

When you first start ACT!, you see the Contact Detail view, which displays information about one contact.

The Contact Detail view is created from a *layout* and is divided into two sections. It has a navigation bar, toolbar, and tabs, as shown in the following illustration. Layouts are the arrangement of the fields, tabs, and background.



What's in the Contact Detail view?

	Feature	Function
1	Toolbar	Provides access to features, such as adding a contact or scheduling a meeting. You can customize the toolbar.
2	Navigation bar	Contains buttons you can use to change to another view, for example, to view a group record.
3	Top portion of window	Includes detailed contact information such as name, address, and telephone numbers.
4	Bottom portion of window	Allows you to view tabs containing related information about the contact such as activities, notes, histories, and opportunities.
5	Layout button	Changes the layout that displays, which affects the background color, fields, and so on.

The toolbar and tabs display in all ACT! layouts, although there are some differences depending on the particular view that you display.

Note: All items mentioned in the preceding list can be customized, so they may look different in your version of ACT!. For more information, see Chapter 37, "Customizing Layouts."

Using the Contact Tabs

By default, the contact layouts included in ACT! contain the following tabs. Each tab has its own function, but several let you modify the display of information, customize the columns, and sort the data.

As you work with ACT!, you will find that you can access information and perform tasks associated with these tabs from other views and windows as well. For example, you can schedule activities from calendars, not just from the Activities tab.

Notes tab Notes are details about conversations, financial information, and other types of information you want to keep track of for a contact. All notes associated with the current contact appear in the Notes tab. From this tab, you can view and insert notes and select contacts to share notes with.

History tab History items are actions performed for the contact, including meetings held, e-mail messages sent, and so on. Some history items, such as changes to data in fields, are generated automatically by ACT!. The History tab lists all history items associated with a contact. From this tab, you can record a history, select contacts to share the history with, and attach files to the contact.

Activities tab Activities are meetings, calls, and to-do tasks. From the Activities tab, you can view all activities scheduled with a contact. You can schedule, reschedule, and clear activities from the tab.

Opportunities tab Opportunities are potential sales. All opportunities for a contact appear in the Opportunities tab. From the tab, you can open, make changes to, and close opportunities.

Groups/Companies tab You can organize contacts into groups and indicate the companies associated with each one. From this tab, you can view the groups or companies that the contact is a member of and add a contact to a group or company.

Secondary Contacts tab Secondary contacts are people associated with the current contact, such as the contact's assistant, manager, or business partner. From the tab, you can add secondary contacts and promote secondary contacts to primary contacts.

Documents tab From this tab, you can add documents, such as Microsoft Excel spreadsheets, to a contact record. If the application is installed on your computer, you can then open the document from within ACT! and view and edit it in the original application.

Contact Info tab This tab includes information about the history of the contact record, such as the date when the record was created and when it was last changed. Some fields in this tab are completed automatically and cannot be edited. However, you can define who can access the contact record and select the Record Manager, who is the user who "owns" the contact data. For more information about user access and the Record Manager, see Chapter 33, "The ACT! Security Model." You can customize this tab.

User Fields tab You can define fields on this tab for any type of contact information. For example, you may define the User 1 field for a hobby or interest for the contact. You can customize this tab.

Home Address tab This tab includes additional fields for a contact's personal information, such as phone numbers and addresses not included in the top portion of the Contact view. You can customize this tab.

See the following topics in the online Help.

About contacts
Navigating through the Contact Detail view
Selecting layouts

Entering Contact Information

You can add contacts from several areas in ACT!, including the Contact Detail view and the Contact List view. New contacts are saved to your database as soon as you move to another record or perform another action.

Adding Contacts to the Database

A contact record contains fields you enter information into. You can use as many or as few of these fields as needed. You can also add an unlimited number of fields to the layout for a contact record. Adding fields to a layout is explained in Chapter 37, "Customizing Layouts."

To add a contact

1. On the toolbar, click **New Contact**.

   A blank contact record appears.

2. Complete the fields, pressing TAB to move between fields.

> **Note:** Make sure that ACT! correctly identifies the contact's first and last name, as well as any title. ACT! uses the title and names in the salutation when you write letters. You can specify how ACT! identifies the contact's name by setting Name Preferences on the General tab in the Preferences dialog box.

3. (Optional) In the **Contact** field, click the browse button (...) to edit contact name details.
4. (Optional) In the **Phone**, **Mobile**, and **Fax** fields, click the browse button (...) to display a dialog box where you can format telephone numbers.

> **Note:** A field that shows a button with an arrow contains a list. Click the arrow and select an item from the list, or type one or two letters in the field, and ACT! completes the field from the list. If you enter text that is not included in the list for the Title, Department, City, or Country fields, ACT! automatically adds the item you typed to the list.

Duplicating Contacts

When you add contacts, you can speed up data entry by duplicating information from an existing contact. You can duplicate information from certain fields, known as *primary fields,* or from all fields. The default primary fields include Company, Phone, Fax, Address, City, State, ZIP Code, Country, and Web Site.

To duplicate contact information

1. Select the contact to duplicate.
2. From the **Contacts** menu, point to **Duplicate Contact**, and then click either **Duplicate data from primary fields** or **Duplicate data from all fields**.
3. Click **OK**.

See the following topics in the online Help.

Adding and deleting contacts
Entering basic contact information
Entering phone number formats
Setting the default salutation preference

Attaching Files to Contact Records

To keep track of documents associated with your contacts, you can attach documents, such as spreadsheets, reports, letters, memos, or e-mail messages, to the contact record. You can also scan documents, such as receipts and invoices, and attach the scanned versions to the contact record.

Note: You can also link documents to the contact record using the Documents tab. For more information, see Chapter 23, "Using the Documents Tab."

To attach a file to a contact

1. Display the contact record in the Contact Detail view.
2. From the **Contacts** menu, click **Attach File**.
3. In the **Attach File** dialog box, locate the file to be attached, and then click **Open**.

See the following topics in the online Help.

Attaching e-mail messages to contacts, companies, or groups
Deleting attached files from contact records

Adding Secondary Contacts

Secondary contacts are associated with contact, such as the primary contact's assistant, team members, or supervisor. Secondary contacts appear on the Secondary Contacts tab of the primary contact.

To add a secondary contact to a contact record

1. On the contact’s detail window, click the **Secondary Contacts** tab.
2. Click **New Secondary Contact**.

   The New Secondary Contact dialog box appears.
3. Complete the necessary information in the fields and on the **Phone/E-mail** and **Business Address** tabs.
4. Click **OK**.

See the following topics in the online Help.

Adding or deleting secondary contacts
Editing secondary contacts
Promoting secondary contacts

Getting Driving Directions for Contact Locations

You can get driving directions to a location, such as a contact's business.

Note: The mapping tool changes for your region. Not all regions use MapQuest.

The origin location defaults to your My Record address information, and the destination location defaults to the current contact record's address information, but you can change the information for both as needed.

To get driving directions

1. From the **View** menu, point to **Internet Services**, point to **Internet Links**, and then click **MapQuest Driving Directions**.
2. In the **Origin** and **Destination** fields, keep the default information or type new information.
3. Click **Drive It!**.

The MapQuest page opens containing the driving directions.

Attaching Web Pages to Contact Records

You can attach a Web page to the History tab of a contact record.

To attach a Web page to a contact record

1. Open the Web page to attach.
2. From the browser's **Tools** menu, click **Attach Web page to ACT! contact**.
3. In the **Attach Web page to the following Contacts** dialog box, in the **Contacts to select from** list, select one or more contacts, and then click the right-arrow button to move the contact names into the **Selected Contacts** list.
4. Click **OK**.

The hyperlink for the attached Web page displays on the History tab for the selected contact(s). Double-click the item to open the Edit History dialog box, and then click the link in the Attachment field to open the Web page.

Chapter 4
Understanding Groups and Companies

To simplify managing contacts with similar information, you can organize your contacts into groups and companies. A *group* is a collection of contacts with something in common, such as being assigned to a project or sharing an interest. A *company* is a record type with special features that lets you easily track contacts within a company. Groups and companies can have subordinate levels, which are subgroups (within groups) and divisions (within companies).

Note: If you used a previous version of ACT!, you may have had companies set up as groups. In ACT! 2006, you can convert those groups to companies.

You create a new group or subgroup from the Group Detail view, and then add contacts to it. Similarly, you create a new company or division from the Company Detail view, and then add contacts to it.

Contacts can be members of multiple groups and companies (but can only be linked to one company). For example, if you play golf with some of your distributors, you can add them to your "Distributors" group and to your personal "Golf" group.

In this chapter, you will learn the advantages of using groups and companies, about group and company membership and you will learn how to find information about groups and companies, how to convert groups to companies, and how to reorganize groups and companies.

Advantages of Using Groups and Companies

Groups and companies help you be more efficient because you can do the following:

- Organize contacts into collections so you can see contacts who are related in some way, such as contacts who work for a specific company, belong to a certain organization, or purchase a special product line.

- Display, in one location, all activities scheduled with all contacts in the group or company.

  By default, all contact information for members of a group or company appears in the group or company record. This includes activities, notes, and so on. However, you can associate an item, like an activity, to a group or company even if the contact the activity belongs to is not a member of the group or company. For more information, see **"Associating Notes, Histories, Activities, or Opportunities" on page 24**.

- Create opportunities, notes, and histories for the group or company.

  You can create opportunities, notes, and histories for a group or subgroup, or a company or division, as well as for each contact in the group or company. You can view all opportunities, notes, and histories in the group or company record. For example, if you create a group or company, you can add a note containing driving directions to a meeting location.

- Send e-mail to or create documents for members of the group or company.

  You can send one e-mail message to all contacts in a group or company. Also, when you create a document, you can perform a mail merge, and then fax or e-mail the document to all members of the group or company, or print it for each member.

Group and Company Membership

You can designate a contact to be a member of one or more groups. You can also designate a contact to be a member of a company, or you can link the contact to a company, which automatically makes the contact a member of the company. Linking the contact to a company provides additional functionality—it places a hyperlink to the company in the Company field of the contact's Detail view and Contact List.

Note: ACT! uses the terms *contact* and *member* interchangeably when referring to a contact in a group.

You can make contacts members of groups or companies in one of three ways:

- Specifying membership criteria.
- Adding individual contacts to groups and companies.
- Linking contacts to companies.

You can combine these methods to create groups and companies.

Adding Contacts Using Criteria

You can add contacts to a group by specifying membership criteria in a *query*. Use this method when you want to set up rules for membership and not specify individual members. For example, you can set up a group and specify that all contacts in France should be members. Contacts that meet the criteria become members of the group or company automatically. Contacts added this way are *dynamic* members of the group or company, meaning they are members until they no longer meet your criteria.

For more information, see Chapter 6, "Working with Companies."

Adding Contacts Individually

You can select individual contacts for group or company membership. Use this method when you want a specific contact to belong in the group or company. Contacts added this way are *static* members of the group or company, meaning that they will be members unless you remove them.

For more information, see Chapter 6, "Working with Companies."

Linking Contacts to Companies

You can link a contact to a company, which adds the contact to the company as a static member, and also provides the following benefits beyond regular membership:

- The company name appears as a hyperlink in the Contact Detail view and Contact List. Clicking the hyperlink opens the Company Detail view.
- When you change the company name, Web site, or address, you can pass those changes to linked contacts.

- All activities, notes, histories, and opportunities associated with a contact are also associated with the company. If the contact stops being a member of the company, the records stay with the company.

For more information, see "Adding Contacts to Companies or Divisions" in Chapter 6, "Working with Companies."

Viewing Groups and Companies

The Groups/Companies tab on the Contact Detail view lists the groups and companies the user is a static member of. To display the groups and companies the user is a dynamic member of, click the Display Dynamic Groups Membership button on the tab.

Information about an individual group or company is also available from its Detail view. You access the Group or Company Detail view from the navigation bar. The Detail view looks different than the Contact Detail view, but shares many of the same tabs, such as Notes, History, Activities, and Opportunities.

The Group Detail and Company Detail views feature the Groups/ Companies tree. The tree allows you to easily view and manipulate groups and companies.

ACT! includes special layouts for groups and companies, which you can choose from the Layout button at the bottom left of the Detail view.

Using the Groups/Companies Tree

The Groups/Companies tree displays the hierarchy of available groups, subgroups, companies, or divisions (depending on the current view). The Companies tree appears in the Company Detail view, and the Groups tree appears in the Group Detail view. If a plus sign appears next to an item, you can click it to display subordinate items. The plus sign changes to a minus sign. Click the minus sign to hide the subordinate items.

You can move and organize groups and companies in the tree by dragging them. Moved items are placed under their destination item. For example, dragging a group to another group causes it to become a subgroup of the destination group. Dragging a subgroup to All Groups promotes it to a group.

Use the Groups/Companies tree to:

- View the entire group or company hierarchy.
- Find a group, subgroup, company, or division.

- Create a group, subgroup, company, or division.
- Move a group, subgroup, company, or division.
- Duplicate a group, subgroup, company, or division.
- Delete a group, subgroup, company, or division.

To move an item in the Groups/Companies tree

- Drag the item you want to move to another item on the tree.

Note: Pausing over a collapsed item in the tree for three seconds while dragging expands the item.

See the following topic in the online Help.

Using the Groups/Companies tree

Viewing Subgroups and Divisions

You can view subgroups or divisions from the applicable Detail view or the Groups/Company dialog box. The steps for viewing subgroups and divisions are similar. An easy way to display the Detail view for a subgroup or division is to click it in the tree.

Using the Group or Company Lists

The results of a group lookup display in the Group List, which you can access from the View menu. Similarly, the results of a company lookup display in the Company List, also accessed from the View Menu.

For example, you might perform a lookup of groups that are resellers for your company. The group records resulting from the search appear in the Group List.

Converting Groups to Companies

If you used a previous version of ACT!, you may have set up groups to represent companies. You can convert those groups into companies. Or you might want to convert a group to a company if, for example, you created a group in ACT! and now realize it would function better as a company.

Note: You cannot have a private company. If you convert a private group into a company, the company will be public.

To convert a group to a company

1. In the **Group tree**, select the group to convert to a company.
2. From the **Groups** menu, click **Convert to Company**.
3. Follow the instructions on the pages, clicking **Next** to advance. Click **Finish** when done.
4. Once the conversion is complete, from the **View** menu, click **Company List** to display the company you created.

See the following topics in the online Help.

About companies and divisions
Creating companies from contacts
Duplicating company records

Reorganizing Groups and Companies

You can reorganize groups and companies, for instance if you want to:

- "Promote" a subgroup to a group or "promote" a division to a company.
- Move a subgroup to another group or move a division to another company.
- "Demote" a group to a subgroup.

See the following topics in the online Help.

Moving companies
Moving groups
Using the Groups/Companies tree

Chapter 5
Working with Groups

Once you organize contacts into groups, you can view activities or sales associated with the group, not just the individual contacts. You can also attach notes, histories, and files to groups, just as you can with contacts.

A group can include up to 14 subgroups. A *subgroup* is a subset of a group. For example, a group may include individuals who live in the same state; within that group, you might have subgroups for towns and cities. You can also create sub-subgroups. Each group can have an unlimited number of subgroups. You can arrange groups and subgroups in hierarchies up to fifteen levels deep.

In this chapter, you will learn about groups, and you will learn to:

- Create and duplicate groups and subgroups.
- Add contacts to groups and subgroups.
- Attach files to group records.

Using Groups

You can organize contacts into groups so you can work with them more efficiently. You can also designate groups as private, such as a group that includes your family and friends. Making a group private does not make the individual contact records private, only the group record. Other ACT! users cannot view private groups.

Users with an Administrator, Manager, or Standard role can delete group records they created. Users with an Administrator or Manager role also can delete other user's groups.

Understanding Groups

Groups help you categorize and organize contacts. For example, you might:

- Use groups as a collection of contacts with something in common, such as golf partners or vendors.
- Save a lookup of contacts as a group. For example, as a committee member, you may need to schedule meetings with other members or e-mail them. You can create a lookup of committee members, and then save it as a group so you can easily communicate with everyone on the committee.

Associating Notes, Histories, Activities, or Opportunities

You can associate items such as notes, histories, activities, or opportunities to a group, when the contact the item belongs to does not belong to the group. Items associated with groups appear in the applicable tabs in the Group Detail view.

To associate an item with a group

1. Open a new or existing note, history, activity, or opportunity.
2. Click the browse (...) button next to the **Associate With** field.
3. In the **Associate with Group/Company** dialog box, select the **Groups/Subgroups** or **Companies/Divisions** tab.
4. Locate the group or company from the list in the left pane, and use the right arrow to select it.

   The group or company name appears in the Associate with list.
5. When finished selecting the group or company, click **OK**.

You can filter the tabs in the Group Detail view to show all items, only items that belong to contacts in the group, or only items that you associate with the group. Depending on the active tab, you can also filter by date, type, priority, and status, using the filter fields on the tab.

See the following topics in the online Help.

About groups and subgroups
Using the tabs in the Groups window
Filtering the display of notes, histories, or attachments
Filtering activities on the Activities tab or on the Task List
Filtering opportunities in the Opportunities tab

Creating and Duplicating Groups and Subgroups

You can create a group and subgroups, and then create new groups or subgroups by duplicating the existing ones. If you delete a group or subgroup, only the group or subgroup is deleted (as well as the group notes, histories, and attachments); the contacts are not deleted.

To create a group or subgroup

1. Display the **Group Detail** view.
2. Right-click, and then click **New Group** or **New Subgroup**.
3. In the **Group** field, type a name for the new group. The name must be unique.
4. In the **Group Description** field, type a description for the group. You can enter up to 128 characters in this field.

Once you have set up a group, you can add contacts to it. See "Adding Contacts to Groups or Subgroups" on page 25.

Scenario

Chris wants to create a subgroup called "Marketing" within a group that exists in his database. He can speed up the process by duplicating the group record that holds all of the address and contact information. He can choose to duplicate data from the record's primary fields or from all fields.

To duplicate a group or subgroup

1. Open the **Group Detail** view for the group or subgroup you want to duplicate.
2. Right-click, and then click **Duplicate**.
3. In the **Duplicate Group/Subgroup** dialog box, select to duplicate data from primary fields or from all fields, and then click **OK**.

   The Group Detail view appears.
4. In the **Group** field, type the new group name.
5. In the **Description** field, type a description for the group.

Note: Duplicating a group or subgroup duplicates membership and the criteria used to add members. For more information, see "Understanding Groups and Companies" on page 17.

See the following topics in the online Help.

Creating and deleting groups
Creating subgroups
Printing contact, group, and company information

Adding Contacts to Groups or Subgroups

You can automatically add members to a group by creating a *query*. Members added this way are *dynamic*; they must continue to meet the criteria in the query to remain members. You can also manually add contacts to a group when you want them to stay in the group regardless of changes. These contacts are *static* group members. For more information about group membership, see "Understanding Groups and Companies" on page 17.

You add and remove contracts from subgroups in the same way as groups.

To add contacts to a group using a query

1. Display the group record you want to add members to or remove members from.
2. Click the **Contacts** tab, and then click **Add/Remove Contacts**.
3. In the **Add/Remove Contacts** dialog box, click **Edit Criteria**.
4. In the **Field Name** box, select an item from the list. For example, select State.
5. In the **Operator** box, select an item from the list. For example, select Equal To (=).
6. In the **Value** box, select an item from the list or type a value. For example, select CA.
7. Click **Add to list**.
8. The criteria you selected displays in the center pane.
9. To preview the contacts who will be included as members, click **Preview**.
10. To add criteria, follow steps 4-7 again. To modify the criteria, click the **And/Or** option.
11. When you are finished modifying the criteria, click **OK**.

    The members appear on the Contacts tab.

To add a contact to a group manually

Note: You also can add a contact to a group by clicking the Add/Remove Contacts button on the Contacts tab, selecting new static or dynamic members, and then clicking OK.

1. In the **Group tree**, select the group to add contacts to.
2. From the **Groups** menu, point to **Group Membership**, and then click **Add/Remove Contacts**.
3. In the **Add/Remove Contacts** dialog box, click **Contacts**.

4. In the **Select Contacts** dialog box, select the contact(s) from the **Contacts to select from** list, and then click the right arrow button to add them to the **Selected Contacts** list.

   - or -

   Type the contact name in the **Look for** field to find the contact you want to add, and then click the right-arrow button to add that contact to the **Selected Contacts** list.

   Note: Select multiple contacts in the Contacts dialog box by holding down CTRL and clicking the contact names.

5. Click **OK** to add the selected contacts to the group.
6. (Optional) To create a contact and add it to the group at the same time, click the **New Contact** button, and then complete the information in the **Add Contact** dialog box.

See the following topic in the online Help.

Adding/removing group contacts

Attaching Files to Group Records

To keep track of documents associated with groups, you can attach documents, such as spreadsheets, reports, letters, memos, or e-mail messages, to the group record. You can also scan documents, such as receipts and invoices, and attach the scanned versions to the group record.

Note: You can also link documents to contact records using the Documents tab. For more information, see Chapter 23, "Using the Documents Tab."

To attach a file to a group record

1. Display the group record in the Group Detail view.
2. From the **Groups** menu, click **Attach File**.
3. In the **Attach File** dialog box, locate the file to be attached, and then click **Open**.

See the following topics in the online Help.

Attaching e-mail messages to company records
Attaching e-mail messages to contact records
Attaching e-mail messages to group records

Chapter 6
Working with Companies

A company is a specialized record type, similar to a group but with additional functionality.

In this chapter, you will learn how to:

- Create or delete companies and divisions.
- Add contacts to companies and divisions.

Creating or Deleting Companies and Divisions

You create companies and then add contacts to them. Users with an Administrator, Manager, or Standard role can delete company records they created. Users with an Administrator or Manager role also can delete other user's companies. For more information about user roles, see **Chapter 32, "Setting Up Users."**

To create a company

1. On the **Company Detail** view or **Company List**, click the **New Company** tool.

   A blank Company Detail view appears.

2. Complete the fields as necessary.
3. Click the **Contacts** tab.
4. To add contacts to the new company, click **Add/Remove Contacts**.

   The Add/Remove Contacts dialog box appears.

5. Add contacts, and then click **OK**.

A company can include divisions. For example, you may want to create a division for all contacts who work in a certain department within the company. You can also create sub-divisions. Each company can have an unlimited number of divisions. You can arrange companies and divisions in hierarchies up to fifteen levels deep.

To create a division

1. Display the company to add a division to.
2. On the toolbar, click the **New Division** tool.
3. A blank Company Detail view appears.
4. Complete the necessary information for the division that you are adding.

   When you display the company, the division you added appears in the Divisions box on the right side of the Company Detail view.

See the following topics in the online Help.

Creating and deleting companies
Creating divisions
Printing contact, group, and company information

Adding Contacts to Companies or Divisions

When you create a company or division, you must specify the contacts to include.

You can automatically add members to a company by creating a *query*. Members added this way are *dynamic*; they must continue to meet the criteria in the query to remain members. You can also manually add contacts to a company when you want them to stay in the company regardless of changes. These contacts are *static* company members.

In addition, you can link a contact to a company, which makes them a member of the company and adds a company hyperlink to the contact record. The hyperlink appears in the company field of the contact record and in the company column of the Contact List. When you make changes to the company, you can choose to pass on those changes to linked contacts. You can also unlink a contact from a company.

For more information about company membership, see Chapter 4, "Understanding Groups and Companies."

You add and remove contacts from divisions in the same way as companies.

To add contacts to a company using a query

1. Display the company record you want to add members to or remove members from.
2. Click the **Contacts** tab, and then click **Add/Remove Contacts**.
3. In the **Add/Remove Contacts** dialog box, click **Edit Criteria**.

4. In the **Field Name** box, select an item from the list. For example, select Company Name.
5. In the **Operator** box, select an item from the list. For example, select Equal To (=).
6. In the **Value** box, select an item from the list or type a value. For example, type CH Gourmet Gifts.
7. Click **Add to list**.
8. The criteria you selected displays in the center pane.
9. To preview the contacts who will be included as members, click **Preview**.
10. To add criteria, follow steps 4-7 again. To modify the criteria, click the **And/Or** option.
11. When you are finished modifying the criteria, click **OK**.

    The members appear on the Contacts tab.

To add a contact to a company manually

> **Note:** You also can add a contact to a company by clicking the Add/Remove Contacts button on the Contacts tab, selecting new static or dynamic members, and then clicking OK.

1. In the **Company tree**, select the company to add contacts to.
2. From the **Groups** menu, point to **Companies**, point to **Company Membership**, and then click **Add/Remove Contacts**.
3. In the **Add/Remove Contacts** dialog box, click **Contacts**.
4. In the **Select Contacts** dialog box, select the contact(s) from the **Contacts to select from** list, and then click the right arrow button to add them to the **Selected Contacts** list.

    \- or -

    Type the contact name in the **Look for** field to find the contact you want to add, and then click the right-arrow button to add that contact to the **Selected Contacts** list.

> **Note:** Select multiple contacts in the Contacts dialog box by holding down CTRL and clicking the contact names.

5. Click **OK** to add the selected contacts to the company.
6. (Optional) To create a contact and add it to the company at the same time, click the **New Contact** button, and then complete the information in the **Add Contact** dialog box.

See the following topic in the online Help.

Adding or removing company contacts

To link a contact to a company

Note: A contact can be a member of multiple companies but can be linked to only one company.

1. On the **Contact Detail** view, in the **Company** field, click the browse (...) button.

   The Link to Company dialog box appears.
2. Select the company to link the contact to.

   Linked contacts are members of the company; all of their notes, activities, and so on, will appear in the tabs.

Note: You can set a preference in the Startup tab of the Preferences dialog box to automatically link contacts to their company records.

You can also create a lookup of contacts, and then link all of the contacts in the lookup to a company.

To link multiple contacts to a company

1. Display the company record you want to add members to or remove members from.
2. Click the **Contacts** tab.
3. Click **Add/Remove Contacts**.

   The **Add/Remove Contacts** dialog box appears.
4. To manually add or remove contacts, click **Contacts**.

   The **Contacts** dialog box appears.

   a. To add a contact, select a contact from the list in the left pane, and then click the right arrow to move the contact to the **Selected Contacts** list.

   b. To remove a contact, select a contact from the **Selected Contacts** list, and then click the left arrow to move the contact to the all contacts list.

c. Continue adding or removing contacts as needed.

d. When finished, click **OK**.

The contacts added are static members of the group. Their membership will not change unless you delete them from the group.

5. To add or remove contacts using criteria, click **Edit Criteria**.

   The **Group Criteria** dialog box appears.

   a. From the **Field Name** list, select an item. For example, select State.

   b. From the **Operator** list, select an item. For example, select Equal To (=).

   c. From the **Value** list, select an item. For example, select CA.

   d. Click **Add** to list.

      The criteria you selected displays in the center pane.

   e. To preview the contacts that will be included as members, click **Preview**.

   f. To add more members, repeat steps b-e. To remove members, adjust the criteria.

   g. When finished, click **OK**.

   The contacts added are dynamic members of the group or company, based on the criteria you selected.

6. Click **OK**.

   The members appear on the Contacts tab.

See the following topic in the online Help.

Adding or removing company contacts
Linking a contact to a company
Linking multiple contacts to a company

Using ACT!

Chapter 7
Finding Information in ACT!

You can find information in ACT! using several methods, including sorting records, performing lookups, using keywords, and creating queries.

In this chapter, you will learn to:

- Sort records.
- Find information using lookups, queries, and keywords.
- Look up contacts by annual events.

Sorting Records in List and Detail Views

You can sort contact, group, or company records in the list views or detail views. Several sort methods are available.

To sort records in a view

- Click a column heading to sort the column in ascending or descending order.

To sort records from the Edit menu

1. From the **Edit** menu, select **Sort**.

   The **Sort** dialog box appears.
2. In the **Sort by** field, select a field, and then select whether to sort in ascending or descending order.
3. To further refine the sort order, complete the remaining fields, and then click **OK**. For example, you might sort by Activity Date, then by Last Name, and then by First Name.

Finding Information Using Lookups, Keywords, and Queries

To effectively manage contacts, groups, and companies, you must be able to find records and information when you need it. Finding information can be as simple as looking for someone by first name, or as complex as finding all contacts who live in the western region of the United States and who purchased more than 100 units of your product in the last six months.

You can find records and information in one of the following ways:

- Create a *lookup*, which is a selection of records based on search criteria that you specify. When you perform a lookup, the results of the search appear in the Detail view or List.
- Use a Keyword Search to find records by searching for certain words. You can search for keywords in the fields of contact, group, and company records and in the Activities, Opportunities, Notes, and History tabs in a Detail view.
- View the Contact List. You can sort the list and create lookups of contacts.
- Use *Advanced queries*, a method of searching for information by comparing all records in the open database with multiple criteria that you specify. The query creates a lookup of the records that match those criteria. ACT! can perform Advanced queries on Contacts and Opportunities.

Using Lookups to Find Records

You can use a lookup to find records. For example, you might create a lookup of all contacts who work at the same company so that you can produce a phone list for that company.

To find records using a single search criterion

1. From the **Lookup** menu, click a lookup command.

   The Lookup dialog box appears.

   Note: The Lookup dialog box does not display if you select any of the following commands: My Record, All Contacts, Keyword Search, Previous, By Example, Annual Events, Contact Activity, All Opportunities, All Groups, or All Companies.

2. In the **Search For** box, type a word to search for or select a word from the list, and then click **OK**.

When the results appear, a record counter at the top of the window shows the total number of records found for that lookup and indicates which record (by number) is displaying. If the results are not what you need, you can modify the lookup.

Looking Up Tagged Contacts

To create a lookup of contacts who do not share information, you can "tag" contacts in the Contact List, and then create a lookup of the tagged contacts.

To create a lookup from tagged contacts

1. On the **Contact List**, select the **Enable Tag Mode** check box.
2. Select the contacts to include in the lookup, and then click **Lookup Selected**.

Looking Up Contacts by Change Date

You can create a lookup of contacts based on the last time a record was modified. You do this by looking up contacts that were or were not changed since a specific date. You can also limit the search by activity or history type.

Scenario

Chris wants to know which of his customers he has had the least contact with since he opened his business in 1999. He is looking for contacts with whom he had scheduled an activity, such as a call, and generated a history, such as an opportunity, but then had no further contact. Chris wants to determine which relationships to re-establish to generate more business. He can do this by creating a lookup of contact activity.

To look up contact activity

1. From the **Lookup** menu, click **Contact Activity**.
2. In the **Contact Activity** dialog box, select the **Not Changed** or **Changed** option.
3. In the **Since Date** field, type a date to start searching from, or click the down arrow to display a calendar and select a date.
4. In the **Search In** box, select options to limit your search, and then click **OK**. ACT! will search for the selected field or activity that was or was not changed since the specified date.

Using Keywords to Find Records

Another way to find records is by searching for keywords. A *keyword* is any word that appears in an ACT! database. For example, if you have looked up a contact record and need to find a note about budgets for that contact, you can search the Notes of that record for entries containing the keyword "budget."

You can start a keyword search from the Lookup menu.

To find records using keywords

1. From the **Lookup** menu, click **Keyword Search**.

   The Keyword Search dialog box appears.
2. In the **Search for** field, type the word or phrase that you want to find or select an item from the list.

   The list contains the last five keywords that you searched for.
3. In the **Search these records** box, select a record type: **Contacts**, **Groups**, or **Companies**.
4. Select which records to search: **All records**, **Current record**, or **Current lookup**.
5. In the **Look in** box, select to search in **Activities**, **Opportunities**, **Histories**, **Notes**, and/or **Fields**.

   You can select one or all options.
6. Click **Find Now**.

The search results appear at the bottom of the window. You can access a record from the list or click Create Lookup. You can create a lookup of selected records or all records in the list.

See the following topics in the online Help.

Creating lookups from keyword search results
Tips for keyword searches

Using Advanced Queries to Find Contacts

An *Advanced query* compares all contacts in the open database with multiple criteria that you specify. All contacts that match the criteria are listed in the resulting lookup. Advanced queries help you find contacts that you cannot find using the commands in the Lookup menu.

Advanced queries use operators, such as greater than (>). For example, to find all contacts in the U.K. whose sales volume is more than 10,000 units and all contacts in Germany whose sales volume is more than 20,000 units, you need to create an Advanced query.

To create an Advanced query

1. From the **Lookup** menu, point to **Advanced**, and then click **Advanced Query**.
2. In the **Advanced Query** dialog box, in the **Type** field, select **Contact** or **Opportunity**. The default setting is Contact.

   Note: Even though you have the option to select Opportunity in the Type field, the result of an Advanced query is always contacts.

3. In the **Field Name** field, select a contact or opportunity field.
4. In the **Operator** field, select an item, such as Contains or Equal To (=).
5. Click **Close** to exit, or click **New Search** to find other annual events.
6. In the **Value** field, type a value or select an item that corresponds to the selected **Field Name** item.
7. Click **Add to list**.

   The query criteria appears in the columns in the middle pane of the dialog box.
8. Click **Preview** to see the record results and the total number of records that are included.
9. (Optional) To remove the criteria and start over, click **Remove**.
10. To select more than one criteria, follow steps 3 through 7 again, and use the **And/Or** column to build the query.

    To change the And/Or setting, in the middle pane of the dialog box, click in the And/Or column for the item and select an option from the list.

11. When you finish selecting criteria, click **OK**.
12. In the **Run Query Options** dialog box, select an option to specify what you want ACT! to do with the results, and then click **OK**. The default setting is Replace lookup.

    The Contact List displays contacts that result from the query.

See the following topics in the online Help.

About queries
Saving and reusing queries
Tips for creating queries

Looking Up Contacts by Annual Events

If you have created annual events, such as birthdays or anniversaries, you can look up those scheduled for the current week, the current month, or a specified date range.

To look up annual events

1. From the **Lookup** menu, click **Annual Events**.
2. In the **Annual Events Search** dialog box, select an event from the **Search for** list.
3. In the **Time Range** box, select a set of dates or date range in which to search for events, and then click **Find Now**.

   A list of contact names and dates appears.

   Note: To look up annual events that occur on February 29th, select the date range February 28th to March 1st, since most years do not include February 28.

4. Click **Create Lookup** to create a lookup of the contacts.

   - or -

   Click **Print List** to print a list of the contact names.
5. (Optional) To display a specific contact record, select the contact from the list, and then click **Go To Contact**.

6. (Optional) To schedule a to-do item for the event, select a contact from the list, and then click **Schedule To-do**.

   The Schedule Activity dialog box appears. All activities scheduled for an annual event appear as to-do activities on your calendars.

See the following topics in the online Help.

About annual events
Commands in the Lookup menu
Finding contacts using the Contact List
Narrowing, adding to, or replacing lookups

Chapter 8
Working with Notes and Histories

You can add information to a contact, group, or company using a *note*. A note can include any information that will help you mange the relationship. You view notes from the Notes tab in the Contact, Group, or Company Detail view.

You can record a *history* item for a contact, group, or company record. A history item can record an action, such as sending a fax to the contact. Some history items are automatically generated as the result of an action such as holding a meeting, sending an e-mail message (if the record history option is set), and so on. History items provide you with chronological information about the contact relationship. You view histories from the History tab.

If the Notes and History tabs do not display information the way you want, you can use the Customize Columns tool to add or remove columns. For more information, see Chapter 16, "Customizing How You Work in ACT!." You can also use the filters to show items for a certain date or date range.

In this chapter, you will learn how to insert notes and record histories for a contact, company, or group.

Inserting Notes

You can insert a note for a contact, group, or company record. By default, all notes associated with the current contact, group, or company appear in the Notes tab.

To insert a note

1. Display the **Contact**, **Group**, or **Company Detail** view.
2. Right-click anywhere on the Detail view, and then click **Insert Note**.

   The Insert Note dialog box appears.

3. In the **Regarding** text box, type the information.

   You can change any of the default fields, attach a file, associate the note with a group or company, and format the text. You can also make the note private so other ACT! users cannot view it. For more information about making the note private, see Chapter 33, "The ACT! Security Model."

4. When finished, click **OK**.

Recording Histories

By default, all histories associated with the current contact, group, or company appear in the History tab. You can record a history for a contact, company, or group using several methods. The following procedure describes the quickest way.

To record a history

1. Display the **Contact**, **Group**, or **Company Detail** view.
2. Right-click anywhere on the Detail view, and then click **Record History**.

   The Record History dialog box appears.

3. From the **Type** and **Result** lists, select a history type and result that best fits what you want to record.
4. From the **Regarding** list, select an item or type the subject of the history item.
5. In the **Details** text box, type the information.

   You can change any of the default fields, attach a file, associate the history with a group or company, format the text, schedule a follow-up activity, and make the history item private so other ACT! users cannot view it. For more information about making the history item private, see Chapter 33, "The ACT! Security Model."

   Note: You can type as much information as you want in the Details text box.

6. When finished, click **OK**.

See the following topics in the online Help.

About the History tab
About the Notes tab

Chapter 9
Managing Calendars

Calendars display all your activities and to-do items for a day, a work week, a calendar week, or a month. You can view your calendar and the calendars of other users (if you have access), and you can grant other users access to your calendar so they can schedule activities for you.

In this chapter, you will learn how to:

- View and print calendar information.
- Grant scheduling access to other users.

Viewing and Printing Calendars

You can use the daily, work week, weekly, and monthly calendars to view and schedule activities. The number of activities appears in the status bar at the bottom of each calendar.

When you view a calendar, you can display the previous or next day, week, or month by clicking the Move Back or Move Forward tools in the toolbar.

To display basic activity information

- Using your mouse, hold the pointer over an activity on a calendar.

  Activity details appear in a pop-up window. They include the activity type, who the activity is scheduled with, what the activity is about, the date and time, and so on. Ellipses indicate that there is more information than can display in the pop-up window. View the full details by double-clicking the activity.

Note: You can also view activity information from the Task List or the Activities tab of a contact, group, or company record.

Daily calendar Displays one day. The day is divided into time intervals. Vertical bars indicate activities that span more than one time interval.

Work week calendar Displays a work week, as set in Preferences. Each day is divided into time intervals. Vertical bars indicate activities that span more than one time interval.

Weekly calendar Displays seven days, listing activities in the order they occur for each day.

Monthly calendar Displays a month. Horizontal bars, or *banners*, indicate activities that span one or more days.

Mini-calendar Displays a month. Days that are bold indicate that an activity is scheduled on that day.

You can print a day, week, or month calendar, choosing from several formats, such as Day Runner and Day Timer, and you can specify the information you want to print, such as the dates and types of activities to include.

To print a calendar

1. From the **File** menu, click **Print**.

   The Print dialog box appears. For field definitions, press F1.
2. From the **Printout Type** list, select **Day Calendar**, **Week Calendar**, or **Month Calendar**.
3. From the **Paper Type** list, select the brand of paper you want to use.
4. To preview the page, select **Enable Preview**.
5. (Optional) Set options for printing the calendar.
6. Click **Print**.

To Quick Print a specific calendar window

1. From the navigation bar, click **Calendar**.
2. From the toolbar, select the view you want to print: **Daily**, **Work Week**, **Weekly**, or **Monthly**.
3. Click the **Print Calendar** button.
4. In the **Print** dialog box, click **OK**.

See the following topics in the online Help.

About calendars
Displaying calendar information
Printing calendars
Viewing and sorting activities

Letting Other Users Schedule Activities for You

Users can view the activities on each other’s calendars, including details for public activities. When viewing another user’s calendar, you can see when a private activity is scheduled, but you cannot see its details.

Users with an Administrator or Manager role can schedule activities on behalf of other users. This scheduling access cannot be restricted.

You can grant scheduling access to your calendar to allow specific users with a Standard or Restricted role to schedule activities for you. A user who schedules an activity on your behalf can only schedule activities with contacts he/she has access to.

To grant scheduling access to another user

1. From the **Schedule** menu, click **Grant Calendar Access**.
2. In the **Calendar Access** dialog box, select the user you want to let schedule activities for you, and then click **Access**.
3. In the **Edit Access** dialog box, select **View and Schedule**, and then click **OK**.

Chapter 10 Scheduling Activities with Contacts, Groups, and Companies

Activities include telephone calls, meetings, and to-do items. You can also create custom activities, such as an activity called “Business Trip.” You can schedule an activity with contacts or ACT! users, and you can associate an activity with groups and companies. If you schedule activities using both Microsoft Outlook and ACT!, you can update and display those activities on either calendar.

In this chapter, you will learn to:

- Schedule activities.
- Change the organizer of an activity.
- Add contacts while scheduling an activity.
- Schedule recurring activities.
- Record completed activities.

Scheduling Activities with Contacts

You can schedule activities from the currently displayed contact, group, or company record, or you can schedule activities from a calendar. If an activity recurs at regular intervals, such as a monthly meeting, you can make it a recurring activity.

If you schedule an activity with an individual who is not in the database, you can add the contact when you schedule the activity.

Also, you can create custom activities, as described in Chapter 16, "Customizing How You Work in ACT!."

Activities must be scheduled with at least one contact (which can be you). To schedule an activity with a group or company, you schedule it with one contact and then associate it with the group or company, as described in this chapter.

When you schedule activities, you can:

- Include details.
- Set alarms to remind you of an activity.
- Specify a location for an activity.
- Set a priority level for the activity.
- Specify how the activity appears on calendars and the Activities tab.

You can schedule one activity with multiple contacts and have this appear as a separate activity for each contact.

Scenario

Chris wants feedback about product orders he shipped to several contacts. He schedules one activity, including all of the contacts he wants to call, and specifies to schedule the activity individually with each contact. As he completes the call for each contact, he records details and clears the activity scheduled with that contact.

To schedule an activity

1. On the toolbar, click the **Schedule Call**, **Schedule Meeting**, or **Schedule To-Do** tool.

   Note: Schedule a custom activity from the Schedule menu by pointing to Other and then selecting the activity type.

   The Schedule Activity dialog box appears.

2. In the **General** tab, enter the activity information as necessary:
   - Using the calendars and lists, select a **Start Date**, **End Date**, **Start Time**, and **End Time**.

   Note: To schedule a timeless activity (i.e., an activity that is not scheduled for a specific time), click Timeless in the Start Time list. Timeless activities appear in the daily recap area of calendars. The daily recap area displays beneath the Mini-calendar on the right side of all calendar views.

   - (Optional) To display a banner on the calendar for activities that span one or more days, select **Use Banner**.
   - In the **Schedule With** list, select a contact to schedule the activity with (the current contact is the default, but you can choose other contacts). Click **My Record** to schedule a personal activity.

- (Optional) In the **Regarding** and **Location** fields, type a description and location for the activity. If you need more space, use the **Details** tab.
- From the **Priority** list, select a priority. The default setting is Low.
- To specify the color for the text and for the stripe that appears next to the activity on the daily and work week calendars, in the **Color** field, click the browse (...) button and select the color.

Tip: Use different colors for different types of activities and priorities or for different users.

- To be reminded of the activity before it occurs, from the **Ring Alarm** list, select an alarm option. The default setting is No alarm.
- To schedule the activity for another user, click the **Schedule For** button. From the **Schedule For** dialog box, in the **Schedule this activity for** list, select the user and then click **OK**. For more information, see Chapter 9, "Managing Calendars."

Note: You can schedule the activity for another user only if you have an Administrator or Manager role, or if the user has given you access to his or her calendar.

3. (Optional) To send e-mail messages to contacts that the activity is scheduled with, from the **Options** menu, select **Send activity e-mail to contacts**. (The Options menu is located in the top right corner of the dialog box.)
4. (Optional) To create a separate activity with each contact that the activity is scheduled with, from the **Options** menu, select **Create separate activity for each contact**.
5. To make the activity private, select **Private**.
6. To make the activity recurring, click the **Recurrence** tab. Follow the steps in **"Scheduling Recurring Activities"** in this chapter.
7. Click **OK**.
8. If you specified to send an e-mail message that contains the details about the activity, the e-mail message appears. Click **Send** to send it.

To associate an activity with a group or company

1. Schedule the activity as described in steps 1- 6 of **"To schedule an activity" on page 52**.
2. In the **General** tab, in the **Associate With** field, click the browse (...) button.

   The Associate with Group/Company dialog box appears.
3. To schedule an activity with a group, select a group from the list under the **Look for** field, and then click the right arrow button.
4. To schedule an activity with a company, click the **Companies/Divisions** tab, select a company from the list under the **Look for** field, and then click the right arrow button.

   Note: Associate the activity with all groups and companies by clicking the double-right arrow on the Groups/Subgroups or Companies/Divisions tab.
5. Click **OK**.

   The activity displays in the Group Detail or Company Detail views.

Changing the Organizer of an Activity

If you have the security level of Administrator or Manager, you can make any user the new organizer of an activity after the activity has been created. A user can also make another user the organizer of a scheduled activity if he or she has access to that user's calendar. You can also change the activity organizer of one or all instances of a recurring activity.

See the following topic in the online Help.

Changing the activity organizer

Adding Contacts While Scheduling an Activity

You can schedule an activity and add a contact at the same time. You add the contact from the Schedule Activity dialog box.

To add a contact from the Schedule Activity dialog box

1. Schedule the activity as described in steps 1-7 of **"To schedule an activity" on page 52**.
2. In the **Schedule Activity** dialog box, on the **General** tab, click the **Contacts** button, and then select **New Contact**.
3. In the **New Contact** dialog box, enter the contact information, and then click **OK**.

   The contact's name displays in the Schedule With field of the Schedule Activity dialog box.

Scheduling Recurring Activities

You may have activities that occur at regular intervals, such as weekly meetings. You can schedule the activity once and specify how often it occurs.

Scenario

Chris has several regular activities: he meets with his vendors each Monday, sends invoices to his accountant every other Friday, and picks up his daughter from piano lessons on the last Saturday of each month. With ACT!, Chris can enter these periodic activities once, specify them as recurring, and then specify when and how often they occur.

To schedule a recurring activity

1. Schedule the activity as described in steps 1-7 of **"To schedule an activity" on page 52**.
2. In the **Schedule Activity** dialog box, click the **Recurrence** tab.
3. In the **Occurs** box, select the frequency with which the activity occurs.

   The default setting is Once. The information in the Activity Occurs box changes depending on the frequency you select.
4. Select the details for the occurrence. For example, if you selected Weekly, select the day(s) of the week that the activity occurs.
5. From the **Starts** calendar selector, select a start date.

6. Select **No End Date**, or, select **Ends**, and then select the end date.
7. Click **OK**.

Recording Completed Activities

When you complete an activity, you can clear it from your schedule, record an outcome for it, and, if necessary, schedule a follow-up activity for it. You can view a history of cleared activities in the History tab of the contact, group, or company record.

Depending on the preferences you set, uncleared activities roll over to the next day. For more information, see Chapter 2, "Setting Preferences for How ACT! Works."

> **Note:** Clearing an activity does not delete information about the activity; it marks it as completed and changes the display on calendars and in the Task List.

To clear an activity and schedule a follow-up activity

1. On a calendar, select the activity.
2. Right-click, and then click **Clear Activity**.
3. In the **Clear Activity** dialog box, enter the activity details and select a **Results** option.
4. (Optional) To schedule a follow-up activity:
    a. Click **Follow-up**.
    b. In the **Schedule Activity** dialog box, specify information for the activity, and then click **OK**.
5. Click **OK**.

See the following topics in the online Help.

Clearing activities from the Recap List
Clearing multiple activities
Recording activity histories
Rescheduling activities
Deleting activities

Chapter 11
Working with an Activity Series

An activity series is a sequence of linked activities. You can create an activity series so you can schedule multiple activities with contacts or users at one time. When you schedule the activity series, you can specify the *anchor date*, which is the date of the event other activities are based on. The series can include activities that occur before or after the anchor date.

Scenario

> Chris receives several product orders from new customers and schedules activities to process and ship the orders and follow up with each customer. Chris can create an activity series, enter the sequence of activities once, and then schedule the activity series with each customer.

You can also set a field trigger for an activity series. A *field trigger* automatically schedules an activity series whenever you enter or leave a particular field or change the value in the field. For more information, see Chapter 36, "Customizing Fields."

In this chapter, you will learn to create and schedule an activity series.

Creating an Activity Series

An activity series must include at least one activity and have a unique name. To create an activity series, you must have an Administrator, Manager, or Standard role. As you create the series, you specify the various activities (e.g., meeting, phone call, or to-do) and when they occur in relation to each other. For example, you might typically have a meeting first, followed by a letter the next day and a follow-up call a week after the meeting. You can create an activity series that automatically schedules the letter and call based on the date of the initial meeting.

You can make an activity series private. Other ACT! users cannot view private activity series.

To create an activity series

1. From the **Schedule** menu, point to **Manage**, and then click **Activity Series Templates**.
2. In the **Activity Series Template Creation** Wizard, **Create a new activity series** is selected by default; click **Next**.
3. Follow the instructions on the pages, clicking **Next** to advance.
4. Click **Finish** when done.

Scheduling an Activity Series

To schedule an activity series, you must have a role higher than Browse.

To schedule an activity series

1. From the **Schedule** menu, click **Activity Series**.
2. In the **Schedule Activity Series** dialog box, from the **Activity series template** list, select the activity series you want to schedule.
3. From the **Series anchor date** calendar selector, select the date to use as the anchor date for the activity series.
4. From the **With** list, select the contact or user to schedule the activity series with.

   Note: You can select multiple contacts by clicking the Contacts button and selecting Select Contacts.

5. Click **Schedule**.

See the following topics in the online Help.

About activity series
Changing activity series templates
Deleting an activity from an activity series
Setting field triggers to launch activity series, applications, or URLs
Scheduling activities for multiple contacts

Chapter 12
Integrating ACT! and Outlook Calendars

If you schedule some appointments and tasks in ACT! and some in Outlook, you may find it helpful to view all your calls, meetings, and to-do's on a single calendar in either ACT! or Outlook. You can view Outlook activities on ACT! calendars, in the Task List, or in the Activities tab. You can also remove activities from both calendars.

Note: To share information between ACT! and Outlook calendars, you must be using Outlook 2000 or later.

You share information between Outlook and ACT! calendars by updating them. Outlook does not have to be running to update your ACT! and Outlook calendars. Users with a Restricted or higher security role can perform an update. The three types of calendar updates are:

One-way from ACT! calendar to Outlook calendar Copies your ACT! activities to your Outlook calendar.

One-way from Outlook calendar to ACT! calendar Copies your Outlook appointments and tasks to your ACT! calendar.

Two-way - If a field has been changed in both products, select the product that "wins" If an activity exists in both applications, select the product that will overwrite the other.

Note: If you share a database with other users, only activities scheduled with or for you will be copied to and from Outlook. Each user must update his/her own calendars.

This chapter explains calendar integration and gives procedures for updating ACT! and Outlook calendars and for removing activities from the calendars.

Calendar Integration

- You can edit the activities in either calendar, but it is best to edit the activity in the calendar of origin, and then update the calendars.
- Update activities will not append or merge any data. If the activity exists in both applications, updating data from one database (the source database) to another (the target database) will overwrite the activity in the target database.
- If your ACT! database contains activities imported from Outlook, when you update your ACT! calendar with newer Outlook data, those activities are overwritten.
- Outlook activities and tasks in ACT! have unique icons:

   An Outlook activity updates as an ACT! meeting.

   An Outlook task updates as an ACT! to-do.

- Dateless Outlook tasks update the ACT! calendar only if you set the date range to All dates. However, only tasks originated in Outlook update from ACT! to the Outlook Tasks list.
- ACT! timeless activities, regardless of meeting type, update to Outlook calendar as all-day events; the time displays as free.
- Tentative Outlook activities update to ACT!. Tentative ACT! activities update to Outlook.
- Changes made to ACT! activities in Outlook are ignored unless you have permission to edit that activity in ACT!. For example:
  - In ACT!, a user schedules a meeting with another user. The meeting organizer, but not the participant, has permission to edit the activity in ACT!.
  - The activity is updated to Outlook.
  - The participant changes the meeting time in Outlook.
  - The activity is updated to ACT!.

  Because the participant does not have permission in ACT! to modify the meeting, the Outlook changes are ignored, and the applications have different activity meeting times.
- An Outlook activity is updated to ACT!. If the names are identified as users and contacts in ACT!, they are placed in the "Schedule With" field of the activity. Names not identified in ACT! are placed in the Details field of the activity.

Updating ACT! and Outlook Calendars

When you update your ACT! or Outlook calendars, you can select a time frame for the activities.

To update ACT! and Outlook calendars

1. Open the ACT! database to update.
2. From the **Tools** menu, point to **Outlook Activities**, and then click **Update Activities**.

   The Update Calendars dialog box appears.
3. In the **Update** box, select the type of update to perform.
4. In the **For these dates** box, select a date option, and if you chose **Date Range**, select a start date and an end date.
5. Click **Update**.

Note: If you update your ACT! calendar with Outlook activities, and a recurring Outlook activity falls within the dates you select, your ACT! calendar will include all occurrences of the Outlook activity as individual activities.

Removing Activities from Your ACT! and Outlook Calendars

You can remove ACT! activities from Outlook and remove Outlook activities from ACT!. However, this action will not remove cleared Outlook activities from ACT!. To remove cleared items, see Chapter 34, "Maintaining Databases."

To remove activities from your ACT! and Outlook calendars

1. Open the ACT! database that you want to remove Outlook activities from.
2. From the **Tools** menu, point to **Outlook Activities**, and then click **Remove Activities**.

   The Remove Activities dialog box appears.
3. In the **Remove all** box, select one or both of the options, and then click **OK**.

Chapter 13
Working in the Task List

The Task List displays activities for a specified period of time, such as all activities for a day. You can filter (limit the list by various fields, such as activity type or date) and sort the list to display only the activities you want to see or print, in the order you prefer. The number of activities, based on the filters applied and for the time specified, appears in the status bar. You can change or clear activities from the Task List.

In this chapter, you will learn to view and clear tasks and to filter the Task List.

Viewing and Clearing Tasks

The following illustration shows all tasks from today on, including cleared tasks (displayed with a line through them).

Date	Time	Priority	Scheduled With	Regarding	Duration	Associate With
7/4/2004	None	Medium	Chris Huffman	Final content review before sending	1 hour	CH Gourmet Gifts
~~7/4/2004~~	~~9:00 AM~~	~~High~~	~~Jackie Jorgensen~~	~~Meeting Follow-up~~	~~30 minutes~~	~~Arcadia Ave. Florist~~
7/4/2004	1:00 PM	Low	<Multiple...	Review new travel policy and expense...	1 hour	CH Gourmet Gifts
7/4/2004	2:00 PM	High	Silvia Carlini	Meeting Follow-up	30 minutes	
7/5/2004	12:00 PM	High	Dylan Nguyen	Lunch Meeting	1 hour	
~~7/6/2004~~	~~11:00 AM~~	~~Medium~~	~~<Multiple...~~	~~Weekly inventory review~~	~~1 hour~~	~~CH Gourmet Gifts~~
7/6/2004	1:00 PM	High	<Multiple...	Strategy session	1 hour	CH Gourmet Gifts
7/6/2004	2:00 PM	Low	Chris Huffman	Check John's references for open sales...	30 minutes	CH Gourmet Gifts
7/7/2004	None	High	Chris Huffman	Ship product	5 minutes	CH Gourmet Gifts
7/7/2004	12:00 AM	Medium	Mackenzie Jensen	Product order	10 minutes	Brandee's Bakery
7/7/2004	10:24 AM	Low	Chris Huffman		2 hours	CH Gourmet Gifts
7/7/2004	1:00 PM	Low	Sandy Ryan	Follow up on the Christmas Promotion...	30 minutes	Ace Pet Store
7/7/2004	None	Low	Chris Huffman	Take car into shop	30 minutes	CH Gourmet Gifts
7/8/2004	None	Low	Chris Huffman	Camping with family	30 minutes	CH Gourmet Gifts
7/8/2004	1:00 PM	Low	Paul Brushman	Follow up on the Golf Tournament Prizes...	30 minutes	Brushy's Golfing...
7/9/2004	None	Medium	Chris Huffman	Select content areas for upcoming...	1 hour	CH Gourmet Gifts
7/9/2004	12:00 AM	Medium	Mackenzie Jensen	Ship product	5 minutes	Brandee's Bakery
7/13/2004	None	Medium	Thomas Andrews	Follow-up on website visit	10 minutes	Modern Electric...
7/13/2004	1:00 PM	Low	Chris Huffman	Weekly update - one on one	1 hour	CH Gourmet Gifts
7/14/2004	None	Medium	Chris Huffman	Ship product	5 minutes	CH Gourmet Gifts
7/14/2004	None	High	Chris Huffman	Ship product	5 minutes	CH Gourmet Gifts
7/14/2004	3:00 PM	Low	Dr. Deiter Brock	Follow up on the Truffles for Patients...	30 minutes	
7/15/2004	None	Medium	Chris Huffman	Arrange presentation meeting	5 minutes	CH Gourmet Gifts
7/15/2004	None	High	Vivian Grace	Follow-up with customer - product received	10 minutes	
7/15/2004	None	High	Morty Manicotti	Ship product	5 minutes	
7/15/2004	9:00 AM	High	<Multiple...	Call with vendor to discuss new products	1 hour	CH Gourmet Gifts
7/15/2004	None	Low	Jonathan Sommer	Send birthday gift	30 minutes	CH Gourmet Gifts
7/16/2004	6:00 PM	Low	Brian David	Dinner Meeting	1 hour	Mix Alliance
7/17/2004	2:00 PM	High	<Multiple...	Review Peachtree setup	1 hour 30...	
7/18/2004	None	High	Morty Manicotti	Product order	10 minutes	
7/18/2004	None	High	Morty Manicotti	Follow-up with customer - product received	10 minutes	
7/20/2004	12:00 PM	Low	<Multiple...	Lunch Meeting	1 hour	CH Gourmet Gifts
7/20/2004	1:00 PM	High	<Multiple...	Sales Training	0 minutes	CH Gourmet Gifts

To view your Task List and task details

- On the navigation bar, click **Task List**.

Tip: Double-click an activity to make changes to it.

To clear a task

1. On the navigation bar, click **Task List**.
2. In the **Cleared** column, select the check box for the activity to clear.
3. Complete the information for clearing the activity, and then click **OK**.

Changing The Task List Display (Filtering)

You can filter the Task List by date, activity type, and priority. You can also choose to show private, timeless, cleared, and Outlook activities.

You can view the activities for other users, if you have access, by clicking Select Users and selecting users from the list.

To filter the Task List

1. On the navigation bar, click **Task List**.
2. From the **Dates**, **Types**, **Priorities**, and **Options** lists, select the options to use in the filter.

See the following topics in the online Help.

About the Task List
Editing activities from the Task List
Printing the Task List

Chapter 14
Designing Reports

ACT! reports can include information for contacts, groups, companies, and opportunities. You can use the reports included with ACT!, based on ACT! report templates, or you can design your own. To run reports included with ACT!, see Chapter 15, "Producing Reports."

You can modify a report's layout, appearance, or data to make it better fit your needs. You can:

- Add or delete fields and objects.
- Modify field values.
- Add, delete, or hide sections of reports.
- Add subreports.

In this chapter, you will learn to create or modify report templates and use the Report Designer.

Creating or Modifying Report Templates

Report templates are based on the kind of report you want to create, such as company or opportunity reports. You can create a template by modifying an existing or blank template. The simplest method is to change an existing report template and save it with a new name.

You create or modify a report template using the Report Designer. The template is divided into sections for the headers, detailed information, and footers. You organize fields and objects, such as pictures, in the template by placing them in the appropriate section. For example, you can place your company logo in the Page Header section so that it displays in the header on every page of the report.

Within sections, you can add fields, field labels, text, and objects. You can also add a subreport to show another set of information, for example, a subreport that displays the notes for each contact.

To create a template

1. From the **Reports** menu, click **New Template**.
2. In the **New Report** dialog box, from the **Report Types** list, select the type of report to create.
3. From the **Templates** list:
    a. Select a report that is similar to the one you want to create.

       - or -

       Create a blank report by clicking the empty report option for the report type you selected, such as Empty Company Report or Empty Opportunity Report.
    b. Click **OK**.

    The template displays in the Report Designer.
4. Add fields and objects and add or edit sections as needed. For more information, see "Modifying the Sections of Report Templates" and "Adding Fields and Objects to Report Templates" in this chapter.
5. Complete the report template. For more information, see "Completing a Report Template" in this chapter.

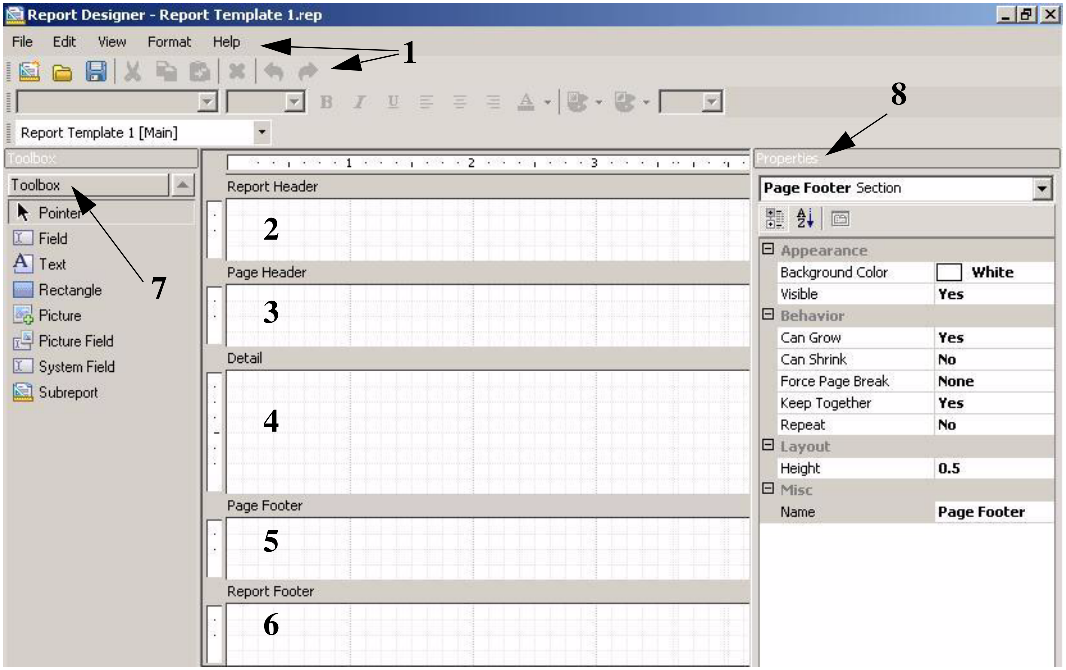
Tip: Preview the template frequently to make sure the results are what you want.

See the following topic in the online Help.

About report templates and the Report Designer

Working with the Report Designer

You create and edit report templates in the Report Designer. The following illustration shows the Report Designer.



What's in the Report Designer?

Feature	Function
1 Menu bar/Toolbar	Includes menu commands and tools to access features in the Report Designer.
2 Report Header section	Appears only on the last page of the report. The Report Header might be the name of the report.
3 Page Header section	Appears on every page. The Page Header might display a graphic, logo, date, or column headings.
4 Detail section	Contains all of the information you want in the report.
5 Page Footer section	Appears on every page. Can be used for page numbers, date, and time.
6 Report Footer section	Appears only on the last page of the report. May contain summary information for the report.
7 Toolbox	Used to change the appearance of the report.
8 Properties window	Used to modify the properties of a field or object.

You must have an Administrator or Manager role to create or modify report templates.

The Report Designer has a Toolbox, a toolbar, menus, dialog boxes, and a Properties window that you can use to make changes to fields, objects, and sections in report templates. You can use the rulers and grid displays to align fields and objects, such as pictures or graphic elements.

The Properties window lists the object's properties, such as border color and alignment. The properties that display in the Properties window depend on the selected object. You change the property by clicking it and then selecting a value for the property. For more information, see "To change a field or object from the Properties window" in this chapter.

You can turn on the Grid (which displays horizontal and vertical lines across the template), Snap to Grid (which aligns fields and objects to a position on the grid automatically), or Ruler (to help you align fields and objects on the template).

To open or close the Properties window and Toolbox and to turn on and off the Grid, Snap to Grid, and Ruler, click the option from the View menu.

See the following topics in the online Help.

Using the Toolbox in report templates or layouts
Using the Properties window in report templates or layouts

Modifying the Sections of Report Templates

Each report template has five default sections: Report Header, Page Header, Detail, Page Footer, and Report Footer.

You modify section properties and add sections from the Define Sections dialog box. When you add a section, you specify the type of information (record type and fields) to include in it. For example, to have the section include information from a company history, select fields from the Company History record type.

You can delete a section that you added, but you cannot delete any of the five default sections or change their order. You can, however, hide the default sections.

Within sections, you can:

- Add, edit, and delete fields and objects.
- Add or reduce the space allotted to a section.
- Specify whether the section can span multiple pages.

To add a section

1. From the **Edit** menu, click **Define Sections**.
2. In the **Define Sections** dialog box, click **Add**.
3. In the **Select a Field to Group By** dialog box, from the **Select a record type** list, select the type of record to add fields for.
4. In the **Fields** list, select the field to group the section by, and then click **OK**.

   The section appears in the Define Sections list and includes a section header and footer.

To edit section properties

1. From the **Edit** menu, click **Define Sections**.
2. In the **Define Sections** dialog box, click the section to change the properties for.
3. To specify where a page break occurs for the section, from the **Page Break** list, select an option.
4. To hide a blank section, select **Collapse if blank**.
5. To allow the section to span multiple pages, select **Allow section to break across multiple pages**.
6. Click **OK**.

To resize a section

1. Hold your mouse pointer over a section heading until a double-sided arrow appears.
2. Drag your mouse up or down to make the section bigger or smaller.

See the following topics in the online Help.

Adding and removing a report section
Hiding sections in a report template
Understanding sections in report templates

Adding Fields and Objects to Report Templates

You can add fields and objects to a template, including text, rectangles, pictures, picture fields (that allow you to add a picture from a contact's record), system fields (installed with the database and maintained by ACT!), and subreports.

To add a field and field label to a report template

1. In the **Toolbox**, click **Field**.
2. Position the cross-hair pointer where you want to insert a field, and then drag the mouse to define the field's size.

   When you release the mouse button, the Select Field dialog box appears.
3. From the **Select a record type** list, select a record type for the new field, and then select the field from the **Fields** list.
4. The **Include a label** check box is selected by default. If you do not want a field label, clear the check box.
5. Click **Add**.

   Repeat these steps to add more fields. If you add multiple fields, they display beneath the first field you added. You can drag the fields to other locations on the template.
6. Click **Close** when you are finished.

To add text

1. In the **Toolbox**, click the **Text** tool.
2. Position the cross-hair pointer where you want to insert text, and then drag the mouse to define the size of the text box.
3. In the **Properties** window, in the **Text** field, type the text.

   If the text does not fit in the text box, it wraps to the next line. Select the text box and drag an edge to resize it.
4. Use the tools on the toolbar to format the text.

To add a picture

1. In the **Toolbox**, click the **Picture** tool.
2. Position the cross-hair pointer where you want to insert the image, and then drag it to define the picture’s size.
3. From the **Open Image** dialog box, locate the picture, and then click **Open**. Drag an edge to resize it.

Scenario

Chris wants to create a report that includes data for the active contacts in his ACT! database. For each contact, he wants to include the notes and history items that occurred in the last three months. To do this, he designs a report that contains two subreports, one for notes and one for histories.

To add a subreport

1. In the **Toolbox**, click **Subreport**.
2. Position the cross-hair pointer where you want to insert the subreport, and then drag the mouse to define the subreport's size.

   When you release the mouse button, the Subreports dialog box appears.
3. In the **Subreport name** field, type a name for the subreport.
4. From the **Select the field** list, select the field that links the main report to the subreport. Depending on the type of report being created, this is usually the contact, group, company, or opportunity name.
5. Click **OK**.

See the following topics in the online Help.

Adding fields and field labels to report templates
Adding and removing picture fields on report templates
Understanding subreports in report templates

Customizing the Appearance of Report Templates

You can customize the appearance of the report template by specifying options, such as the background color of the template or the border of a field. You do this using the Properties window or the tools on the toolbar.

To change a field or object from the Properties window

1. Select the object you want to modify.
2. From the **Properties** window, click the property, and then do one of the following:
   - If the property contains a drop-down list, select the value from the list.
   - If the property contains a numeric value, specify the value.
   - If the property contains text, edit the text.

Defining Report Filters

When you create a report template, you can set the filters to use each time you run a report. For example, you might frequently run a report with a filter to display information about a contact's activities in the last quarter. You can set the filters in the template instead of setting them each time you run the report.

See the following topic in the online Help.

Filtering data in report templates

Completing a Report Template

When you have finished creating or modifying a template, you can save or print it, preview it, or run the report.

To print, view, or run a report from the template

- From the **File** menu, do one of the following:
  - To print the template, click **Print**.
  - To view the template, click **Print Preview**.
  - To run a report from the template, click **Run**, and then specify filter options in the **Define Filters** dialog box.

Chapter 15
Producing Reports

You can use the reports provided with ACT! to view information in your database. Reports are generated from report templates and can include information for contacts, groups, companies, and opportunities.

In this chapter, you will learn to run reports for contacts, groups, and companies. For information on running opportunity reports, see Chapter 26, "Forecasting and Reporting Opportunities."

For more information on creating and modifying reports, see Chapter 14, "Designing Reports."

When you run a report for contacts, groups, or companies, you can include data for any of the following:

- The current contact, group, or company
- The current lookup
- All contacts, groups, or companies

For example, you can run a History Summary report for one contact or run a Contact report listing all contacts in a state.

The information that displays on the report depends on the type of report you run and the options you use to filter the data. Some filters are only available for reports that include sections for them. For more information about report sections, see Chapter 14, "Designing Reports."

To run a report for contacts, groups, or companies

1. Select or look up the records you want to include in the report.

   Tip: To have report entries appear in a particular order, such as alphabetically, sort the records before running the report.

2. From the **Reports** menu, click the report that you want to run.

   Note: You can select a contact report from the menu; you can select a group or company report by pointing to Group Reports or Company Reports and then clicking the report.

   The Define Filters dialog box appears. The options that display on the General tab depend on the type of report you selected.

3. From the **Send the report output to** list, select an output option.
4. Under **Create report for**, select the contacts, groups, or companies to include. The options depend on whether you selected a contact, group, or company report.
5. (Optional) If you are running a contact report, select **Exclude 'My Record'** to exclude your My Record from the report.
6. Under **Use data managed by**, select whether to include **All users** or **Selected users**. If necessary, select the users from the list.
7. (Optional) Click the **Activity**, **Note**, **History**, or **Opportunity** tab to specify the data you want to include.

   Note: The Activity, Note, History, or Opportunity tab may not appear in the Define Filters dialog box if the selected report does not include sections for them.

8. Click **OK**.
   - If you selected to preview the report, the report appears.
   - If you chose to send the report to the printer, the **Print** dialog box appears. Select the Print options, and then click **OK**.
   - If you selected another option, you will be prompted to save the report. Type a file name and select a file type.

Chapter 16
Customizing How You Work in ACT!

You can customize ACT! to streamline the actions you perform most often and to display the tools and data you use most frequently.

In this chapter, you will learn to:

- Customize columns in list views.
- Customize the navigation bar, menu bar, and toolbar.
- Create and modify keyboard shortcuts.
- Create custom commands.
- Customize your activities

Customizing Columns in List Views

Many ACT! views and tabs contain lists of data in columns. These include:

- Contact List view
- Task List view
- Company List view
- Group List view
- Activities tab
- Opportunities tab
- Notes tab
- History tab

You can change the display of information by adding, removing, rearranging, or resizing columns.

To add a column to a list view

1. Display the list view or tab to change.
2. Click **Options**, and then select **Customize Columns**.

3. In the **Customize Columns** dialog box, from the **Available fields** list, select one or more fields to add to the list view, and then click the right arrow button to move them to the **Show as columns in this order** list.
4. Click **OK**.

See the following topics in the online Help.

About columns in list views
Changing column width
Repositioning columns

Customizing the Navigation Bar, Menu Bar, and Toolbar

You can organize how information displays on the navigation bar, menu bar, and toolbar. You also can create shortcuts to help you navigate through ACT! quickly and easily. Some ways you might customize ACT! include:

- Changing how the navigation bar displays.
- Customizing the menu bar and the toolbar so that commands and buttons display in the order you prefer.
- Creating your own toolbar.

Changing the Navigation Bar Display

The navigation bar displays on the left side of the ACT! window. You can display the navigation bar with large or small icons, or you can change it to display a standard, expanded, or classic menu. (Standard menu is the default setting.) You can also add or remove commands on the navigation bar.

Note: Any user can change the navigation bar display and add or remove commands.

To change the navigation bar display

1. Right-click anywhere in the navigation bar.
2. From the menu, click **Large Icons**, **Small Icons**, **Standard menu**, **Expanded menu**, or **Classic menu**.

To add or remove commands

1. From the **Tools** menu, point to **Customize**, and then click **Navbar**.
2. In the **Customize Standard Menu** dialog box, drag the commands to or from the navigation bar.

Note: The name of the dialog box changes depending on whether you are using the Standard, Expanded, or Classic menu on the navigation bar.

3. (Optional) Click **Reset** to return to the default commands.

Customizing the Menu Bars and Toolbar

You can change the order of the menus in any menu bar. For example, you can move items you seldom use to the right where they are out of your way. You can also rename, add, or remove commands, or add separators between them. *Separators* divide commands into logical groupings. You can add icons representing commands to a menu or menu bar. At any time, you can reset the menus so that they show the original commands in the original order.

Note: Standard users and above can customize the menu bars and toolbars.

To customize the toolbar, you can:

- Rearrange and group tools.
- Change the size of tool buttons.
- Specify whether tooltips display when you move the pointer over a tool.
- Hide or display specific tools.

You can also create a custom toolbar that contains the tools you use most often.

To change menu displays

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
2. Click the **Options** tab.
   - The default setting is to display full menus. Select **Show full menus after a short delay** to view the most used functions first.
   - To view shortcut keys, select **Show shortcut keys in tooltips**.

To change the toolbar display

- From the **Tools** menu, point to **Customize**, and then click **Show Large Buttons** or **Show Small Buttons**.
- To display a brief explanation of a tool when you rest the pointer over it, select **Show Tooltips on menus and toolbars**.

To create a toolbar

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
2. In the **Customize Menus and Toolbars** dialog box, select the **Toolbars** tab, and then click **New**.
3. In the **New Toolbar** dialog box, type a name for the toolbar you want to add, and then click **OK**.

   An empty toolbar appears in the upper left corner of the screen.
4. Click the toolbar you just created and drag it to where you want it to display on the screen. You can place it above or below the current toolbar or to the side of the application.

Once you have created the toolbar, you need to add tools to it, as described in the next section.

To add tools to a toolbar

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
2. In the **Customize Menus and Toolbars** dialog box, click the **Commands** tab.

> **Note:** If you have created custom commands, they are listed on the Commands tab. See **"Creating Custom Commands" on page 80**.

3. From the **Categories** list, select the category of tool, such as Contacts, Edit, File, and so on, to add.
4. In the **Commands** list, click and drag the command (tool) onto the toolbar. Continue adding commands from categories as needed, and then click **OK**.

See the following topics in the online Help.

About customizing menus and toolbars
Resetting menus and toolbars
Understanding menus, toolbars, and commands

Creating and Modifying Keyboard Shortcuts

You can use key combinations to perform commands. For example, to open a database, you could use the menu command, or you could press CTRL+O on your keyboard. Shortcut keys exist for all windows, calendars, the Contact List, e-mail, and the ACT! word processor.

The most commonly used shortcut keys are listed on the *Quick Reference Card*; all shortcut keys are listed in the online Help.

You can modify existing shortcut keys or create shortcuts.

To add a shortcut key combination

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
2. In the **Customize Menus and Toolbars** dialog box, click the **Keyboard** tab.
3. In the **Categories** list, select the name of the menu that contains a command you want to assign a shortcut key to.

   The Commands and Assigned shortcuts lists display the commands on the selected menu and the shortcuts that are currently assigned.

   Note: To assign a shortcut key to a command that you created, select Custom Commands. See "Creating Custom Commands" later in this chapter.

4. In the **Commands** list, select a command, and then click **Assign Shortcut**.

5. In the **Assign Shortcut** dialog box, press the key combination that you want to assign to the command.

   In the Shortcut key currently assigned to field, ACT! displays any command currently using the shortcut key combination you pressed. You can replace the current assignment with this one or press a different key combination for the command.

6. Click **OK** to save the new assignment, and then click **Close**.

See the following topics in the online Help.

About keyboard shortcuts
Resetting shortcut keys
Adding and deleting shortcut keys

Creating Custom Commands

You can create custom commands that launch applications outside of ACT!. For example, if you want to use another application while using ACT!, you can create a command to open that application. You can assign an icon to the command and include it on menus or toolbars, or assign a shortcut key combination.

> **Note:** Once you create a custom command, you must add it to a menu or toolbar or assign it a shortcut key. See **"Customizing the Navigation Bar, Menu Bar, and Toolbar" on page 76** and **"Creating and Modifying Keyboard Shortcuts" on page 79** in this chapter.

Scenario

Chris uses the Windows Calculator on a daily basis. He would like to create a custom command so that he can launch that application while he works in ACT!.

To create a custom command

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
2. In the **Customize Menus and Toolbars** dialog box, click the **Custom Commands** tab.
3. Click **New**.
4. In the **Command Name** field, type a name for the command.
5. In the **Tooltip Text** field, enter a short description of the command.

6. In the **Command Line** field, enter the exact file name and location of the application's executable file or document file, or click the browse button (...) to locate the file.
7. Click **Icon**, locate the file for the icon you want to represent the command, and then click **Open**.
8. Click **OK** to close the dialog box, and then click **Add Command**.

See the following topics in the online Help.

Assigning icons to custom commands
Copying and modifying custom commands

Customizing Activities

Users with an Administrator or Manager role can create custom activity types and result types, modify priority names, and create events. An *event* is a timeless activity that can be set as recurring, such as a birthday. Depending on your calendar settings, events display as a banner in calendars. For more information about preferences, see Chapter 2, "Setting Preferences for How ACT! Works."

See the following topics in the online Help.

Adding events
Editing or deleting events

Creating Custom Activity and Result Types

You can create a custom activity type and assign an icon to it. For example, you can create an activity type, “Business Trip,” and then associate an icon with that activity type. You can use your own icons with custom activities.

By default, when you create a custom activity type, you also create two result types: Completed and Not Completed. You can change the names of the Completed and Not Completed result types, but you cannot remove them. These result types are required so that you can specify the result of cleared activities. You can also add and delete result types if there are more than two.

To create an activity type

1. From the **Schedule** menu, point to **Manage**, and then click **Activity Types**.

   The Manage Activity Types dialog box displays a list of the activity types.
2. Click **Add**.

3. In the **Add Activity Type** dialog box, in the **Name** field, type the name of the activity type.
4. The activity is active by default; to make it inactive, clear the **Active** check box.

Note: Inactive activity types are not available for scheduling. Changing an activity type to inactive does not change activities of that type that were previously scheduled; they remain on the calendar.

5. To associate an icon to the activity type, click **Browse**, and then locate and open the icon.
6. (Optional) To add or edit the result types for this activity, from the **Add Activity Type** dialog box, click **Add**.
7. When finished, click **OK**.

See the following topics in the online Help.

Adding custom activities and result types
Assigning icons to activity types
Deactivating activity types
Editing activity types

Editing Priorities

You can select up to five priorities to use with activities. You can change priority names and modify the number of priorities available, but you must have at least one active priority.

See the following topics in the online Help.

Activating and deactivating activity priorities
Editing activity priorities
Restoring original activity priorities

Chapter 17
Using Internet Services

The Internet Services feature allows you to access an Internet browser through ACT! and provides links to ACT! products, service, and support and to other information Web pages. To use Internet Services, you need an Internet account, an Internet Service Provider, and Microsoft Internet Explorer 5.5 or later.

You can create and manage links to your favorite Web sites and display those links within ACT!. These favorite links might be a special page from your company intranet or an Internet page. When you click the link, ACT! displays the page.

You can also access several reference and research sites such as MapQuest Driving Directions, MapQuest Maps, Yahoo! Weather, Yahoo! Stock Quote, Yahoo! Ticker Symbol Lookup, and others.

Note: The reference and research sites vary according to your locale.

You can get a map or driving directions and attach a Web page to a contact record. See Chapter 3, "Working with Contacts."

When you click the Web address for a contact, the ACT! Internet Services feature opens the site in Internet Explorer.

In this chapter, you will learn to:

- Access ACT! products, service, and support and Web pages.
- Create and manage favorite Internet links.
- Access reference and research sites.

Accessing ACT! Web Pages

You can easily access ACT! products, service and support, and other information.

- To display the ACT! Web site, on the navigation bar, click **Internet Services**.
- From the **View** menu, point to **Internet Services,** and then click one of the commands to access ACT! Web site pages.

Creating and Managing Favorite Internet Links

You can create and manage Internet links to Web sites you visit frequently, and you can display those links on the ACT! Links menu. The links are like Favorites or Bookmarks in Internet Explorer, except they appear in ACT!.

Scenario

Chris visits several trade association Web sites to purchase mailing lists, to keep informed of new and changing laws that affect his business, and to exchange ideas with other trade members. He can create links to these favorite Web sites.

To create and manage an Internet link

1. From the **View** menu, point to **Internet Services**, point to **ACT! Links**, and then click **Manage Links**.
2. In the **Manage Internet Links** dialog box, click **Add**.
3. In the **Add Internet Link** dialog box, in the **Internet link name** field, type a name for the link.
4. In the **Web Address (URL)** field, type the full address for the Web site.

Tip: You can navigate to the Web site, copy the URL, and then paste it in the Web Address (URL) field.

5. Click **OK**.

From the Manage Internet Links dialog box, you can edit or delete a link and arrange the order of links in the ACT! Links menu.

Accessing Reference and Research Web Sites

ACT! provides links to several reference and research Web sites.

To access a reference or research Web site

- From the **View** menu, point to **Internet Services**, point to **Internet Links**, and then click one of the sites.

See the following topics in the online Help.

About Internet Services
Arranging the favorite Internet links list
Deleting favorite Internet links
Editing favorite Internet links

Communicating with Contacts

Chapter 18
Using the Spelling Checker

The spelling checker scans various items in ACT! for potential spelling errors. Items that are checked include ACT! Word Processor documents and templates, e-mail messages, notes, histories, activities, and opportunities. The spelling checker compares the words in your text item to words in a standard dictionary file (Main.dct) and to a user dictionary file, and then suggests alternate spellings and words.

In this chapter, you will learn to work with dictionaries and check spelling.

Working with Dictionaries

You can select the dictionary to use as your main dictionary, and you can define a user dictionary. The user dictionary is useful for technical terms and acronyms related to your company.

By default, the main dictionary is Main, and the user-defined dictionary is Custom1. You can create or select a different user-defined dictionary.

To create a user dictionary

1. From the **Tools** menu, click **Preferences**.
2. In the **Preferences** dialog box, click the **Communication** tab.
3. Click **Spelling Preferences**.
4. In the **Spelling Preferences** dialog box, under **Select user dictionary**, click **New**.
5. In the **File name** field, type a name for the user dictionary, and then click **Open**.

To add or delete words in a user dictionary

1. From the **Tools** menu, click **Preferences**.
2. In the **Preferences** dialog box, click the **Communication** tab.
3. Click **Spelling Preferences**.
4. In the **Spelling Preferences** dialog box, under **Select user dictionary**, click **Modify**.

5. In the **Modify Dictionary File** dialog box:
   - To add a word: type it in the **Word** field, and then click **Add**.
   - To delete a word: select it, and then click **Delete**.

Checking Spelling

You can check spelling in ACT! word-processing documents and in fields in Detail views, activity details, opportunity details, notes, histories, and e-mail messages.

To check spelling

1. To begin checking spelling:
   - In a document: In the ACT! Word Processor window: From the **Spelling** menu, click **Check Document**.
   - In an activity or opportunity: In the **Opportunity** or **Schedule Activity** dialog box, click the **Details** tab, and then on the toolbar, click the **Check Spelling** tool.
   - In a note or history: In the **Edit Note** or **Edit History** dialog box, on the toolbar, click the **Check Spelling** tool.
   - In a field in a detail view: Place the cursor in the field, and then from the **Tools** menu, click **Spelling**.

   The Spell Check dialog box displays the first unrecognized word in the Word box and lists alternate words in the Suggestions box.
2. Do one of the following:
   - To do nothing, click **Skip**.
   - To add the word to the user-defined dictionary, click **Add**.
   - To use one of the suggested corrections, in **Suggestions**, select the alternate word, and then click **Replace**.
   - To replace the word yourself, in the **Replace with** box, type the replacement text, and then click **Replace**.
3. Repeat step 2 until a message appears indicating that the check is complete, and then click **OK**.

See the following topics in the online Help.

About the spelling checker
Locating the dictionary folder
Viewing or modifying the contents of a user dictionary file

Chapter 19
Using E-mail

The ACT! e-mail feature lets you easily manage messages that you send to or receive from contacts. ACT! e-mail integrates with many e-mail systems, so you can continue using your existing e-mail system with ACT!. After you have selected an e-mail system to use with ACT!, you select preferences to specify default composing options, folder settings, handling attachments, and so on.

You can write and send an e-mail message to one or more contacts. Users with a Standard role and above can export a contact, group, or company record by attaching the record to an e-mail message. You also can attach a scheduled activity.

Tip: To send an e-mail message to a contact, he must have an e-mail address. To find contacts who are missing e-mail addresses, use the E-mail Address command on the Lookup menu, and select the Empty field option in the Search for box.

If the HTML composing option is available for the e-mail system you select, it lets you format your e-mail text, add background colors, or insert pictures or hyperlinks.

After you receive and read an e-mail message, you can take several actions:

- Attach the message to a contact, group, or company record
- Create a contact record from the sender
- Create an activity from the message
- Import or merge an attached contact, group, or company record from an e-mail message (Standard users and above)

If you use Microsoft Outlook as your e-mail system with ACT!, you can access your ACT! address books from Outlook. Whether you send a message from Outlook or from ACT!, you can record a history of the e-mail message.

You can work with e-mail when you are offline.

If you need to move an ACT! e-mail database to a new computer, you can transfer the files and then restore them on the new computer.

In this chapter, you will learn to:

- Set up your e-mail system.
- Open e-mail.
- Write and send e-mail messages.
- Receive and read e-mail messages.
- Organize e-mail messages.
- Use Microsoft Outlook e-mail with ACT!.
- Transfer and restore ACT! e-mail.

Setting Up Your E-mail System

To use e-mail with ACT!, first install one or more of the following programs:

- Microsoft Outlook 2000 or a later version
- Outlook Express 5.5 or 6.0
- Eudora 5.2
- Lotus Notes 6.5
- Internet e-mail (SMTP/POP3)

To use Internet e-mail with ACT!, you also need an Internet account with an Internet Service Provider (ISP).

You can use more than one e-mail software or system in ACT!. You may do this, for example, if you use different systems at work and at home. When you create a message, you can send it using a system other than the one designated as the default.

To set up your e-mail system

1. From **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
2. Click **E-mail System Setup** and follow the instructions on the pages. Click **Next** to advance, and then click **Finish**.
3. On the **E-mail** tab, in the **Send e-mail to contacts using** list, select the default system, and then click **Apply**.

See the following topics in the online Help.

Setting up Eudora
Setting up Internet Mail
Setting up Lotus Notes
Setting up Microsoft Outlook
Using Eudora with ACT!
Using Outlook Express with ACT!
Using Lotus Notes with ACT!
Working with e-mail offline

Opening E-mail

When you open the ACT! E-mail window, you can view messages in your Inbox and other folders, reply to or forward messages, find an e-mail message, and perform many other e-mail functions.

To open the ACT! E-mail window

- On the navigation bar, click **E-mail**.

The ACT! E-mail window displays in a three-pane view: a Folder List, a message list, and a Preview Pane. You can hide the Folder List and Preview Pane.

The following table describes the features and functions of the ACT! E-mail window.

Feature	Function
Folder List	Displays each e-mail system's folders for storing messages. ACT! includes five default folders for each e-mail system you have set up: Deleted Items, Drafts, Inbox, Outbox, and Sent Items.
Message list	Displays all messages in the folder selected in the Folder List.
Splitter bars	Used to adjust the size of each pane in the window.
Preview Pane	Displays the content of the message selected in the message list. Use the Toolbar button to turn on or off the display of the Preview Pane.
Status bar	Displays the status (Working Online or Offline), the total number of messages, and the number of unread messages for the selected folder.

If you have multiple e-mail systems configured, each e-mail system has default folders. For more information, see "Organizing E-mail Messages" in this chapter.

See the following topics in the online Help.

About the ACT! E-mail window
Displaying or hiding the Folder List
Displaying or hiding the Preview Pane
Displaying or hiding the status bar
Resizing the ACT! E-mail window panes

Note: If you are offline and cannot connect to your e-mail account, you can still read, write, and reply to e-mail messages, store them in the Drafts folder, and then send them later when you log on.

Writing and Sending E-mail Messages

You can send e-mail messages to one or more individuals. In the New Message window, you can attach items to the message. These include letters, memos, reports, contact records, group records, company records, or scheduled activities. Before sending an e-mail message, you can:

- Check your spelling with the spelling checker
- Set the message's priority
- Request a return receipt
- Set an option to create a history item showing that the message was sent

You can send the message immediately or store it to deliver later.

You can use the mail merge feature to send e-mail messages to multiple contacts. You create or modify a special e-mail template to run a mail merge. For more information, see Chapter 22, "Creating Documents with the ACT! Word Processor."

To write and send an e-mail message

Note: There are several ways to write an e-mail message. This procedure is the quickest way to send an e-mail message to a single contact.

1. On a **Contact Detail** view, click the contact's e-mail address.

   The New Message window appears with the contact's name in the To field.
2. In the **Subject** field, type a short description of the message.
3. (Optional) Select options: **Priority**, **Create History**, or **Return receipt**.
4. In the text box, type the message.
5. (Optional) Insert a signature.

   Before sending the message, you can use the menus and tools in the New Message window to check recipient names, format the text, check spelling, attach files, and insert hyperlinks.
6. Click **Send**.

Note: If you use Microsoft Outlook with ACT!, you must have Outlook open to send e-mail; otherwise, the e-mail remains in the Outbox.

To attach a contact record to an e-mail message

Note: Standard and above users can attach contact, group, and company records to an e-mail message.

1. Open the **New Message** window and create your message as described in "To write and send an e-mail message."
2. On the toolbar, click the **Attach Contact** tool.
3. In the **Attach Contact(s)** dialog box, under **Select contacts from**, select an option. If applicable, select the group or company to select contacts from.
4. From the list on the bottom left, select a contact, and then click **Add**.

   The selected contact appears in the Attach These Contacts list. You can add all records to this list or remove records.
5. Click **OK**.
6. Click **Send**, or click **Save** to send the e-mail later.

See the following topics in the online Help.

About the New Message window
Addressing e-mail messages
Attaching company and division records to e-mail messages
Attaching files to e-mail messages
Attaching group and subgroup records to e-mail messages
Attaching scheduled activities to e-mail messages
Checking names before sending e-mail messages
Checking spelling in e-mail messages
Using mail merge with e-mail

Formatting E-mail Messages

You can send and receive an e-mail message in two formats: plain text or HTML. Plain text messages have no formatting. When writing a message in HTML, however, you can format text with numbering, bullets, alignment, and with different font types, styles, and colors. You can also insert pictures and hyperlinks.

Note: Not all e-mail systems that work with ACT! allow HTML format.

To select the default text format for e-mail messages

1. From the **Tools** menu, click **Preferences**.
2. Click the **E-mail** tab, and then click **Composing Options**.
3. In the **Composing Options** dialog box, in the **Send e-mails in** field, select **HTML** or **Plain Text**, and then click **OK**.

See the following topics in the online Help.

About formatting e-mail messages
Adding bulleted or numbered lists in e-mail messages
Inserting hyperlinks into e-mail messages
Inserting or deleting pictures in e-mail messages
Inserting signature text

Receiving and Reading E-mail Messages

An e-mail message you receive appears in the Inbox folder for your default e-mail system. If you have set the When connected, notify me of new e-mail every __ minutes option on the E-mail tab of the Preferences dialog box, a sound plays when new mail arrives. You can preview the message in the Preview Pane or open it. After reading a message, you can reply to it, forward it to others, or move it to another folder.

You can attach a message you have received to a contact, group, or company record so that you have a history of it. This feature makes a copy of the message; it does not move it from e-mail. The attached message is available to other users (unless the history item is made private), and it will synchronize.

If you receive an e-mail message with an ACT! contact, group, or company record attached, you can merge the record into the database. If you receive an e-mail notification of an activity, you can merge the activity into the database so it appears on your calendar. Merging a record or activity in this way is like importing the record. Only the contact, group, or company record imports; the import does not include extended data, such as notes or history.

> **Note:** Standard and above users can merge attached records into the database.

If you receive an e-mail message from someone who is not a contact in your database, you can easily create a contact record from the information in the message.

To reply to an e-mail message

1. On the navigation bar, click **E-mail**.
2. From the **message list**, select a message, and then click the **Reply** tool.
3. Type your reply in the text box, and then click **Send.**

To attach an e-mail message to a contact record

1. On the navigation bar, click **E-mail**.
2. In the **Folder List**, select the folder containing the e-mail message.
3. In the list of e-mail messages, select the message to attach.
4. From the **Actions** menu, point to **Attach**, and then click **Attach to Contact.**
5. In the **Attach E-Mail to Contacts** dialog box, select a contact name, and then click **Add.**

Scenario

Chris receives an e-mail message from someone whose information is not in his database. He wants to add the sender as a contact record.

To create a contact record from an e-mail message

1. Select a message from the sender who is not in the database.
2. From the **Actions** menu, click **Create Contact From Sender.**
3. In the **New Contact** dialog box, enter the contact's information in the empty fields, and then click **OK**.

See the following topics in the online Help.

Checking for new e-mail messages
Creating activities from e-mail messages
Forwarding e-mail messages
Merging attachments into ACT! databases
Printing e-mail messages
Saving e-mail messages to files

Organizing E-mail Messages

You can organize and manage messages using folders in the Folder List. Messages you send are automatically stored in the Sent Items folder. Messages you save to send later are automatically stored in the Drafts folder.

Note: If you set up more than one e-mail system, the messages are stored in the folders for the system they were created in.

By default, the following five folders are created for each e-mail system you set up: Deleted Items, Drafts, Inbox, Outbox, and Sent Items. You can create new folders in which to save messages, and then move or copy messages from one folder to another. For example, you can create work-related and personal folders in which to categorize and store your messages. You can move a folder into another folder, and you can change folder names.

From the Folder List, you can search for an e-mail message that you received or sent.

To create a new e-mail folder

1. In the **ACT! E-mail** window, click the **Folder List**.
2. On the toolbar, click the **New** tool, and then click **Folder**.
3. In the **Create Folder** dialog box, type the name in the **Folder name** field.
4. From the list box, select the folder that will contain the new folder, and then click **OK**.

To move an e-mail message into a folder

- In the **ACT! E-mail** window, drag the message from the message list to a folder in the **Folder List**.

To find an e-mail message

1. In the **Folder List**, right-click the folder to search, and then click **Find Message**.
2. In the **Find Message** dialog box, enter search criteria in the **From**, **To**, **Subject**, **Message**, **Received before**, or **Received after** fields. For example, in the Message field, enter a word that was in the body of the message.

3. Click **Find Now**.

   The search results appear in the bottom pane of the Find Message dialog box. Double-click an e-mail message to open it.

See the following topics in the online Help.

Copying or moving e-mail messages to folders
Deleting e-mail messages
Moving e-mail folders
Viewing sent or deleted messages

Using Microsoft Outlook E-mail with ACT!

If you use Microsoft Outlook to send and receive e-mail messages, you can add ACT! address books to Outlook. Then, from Outlook, you can select ACT! contacts to send e-mail messages to, record those messages to the contact's history, or attach Outlook e-mail messages to a contact's record.

See the following topics in the online Help.

About Outlook address book integration
Adding ACT! address books to Outlook
Attaching Outlook e-mail messages to ACT! contact records
Sending e-mail messages to ACT! contacts using Outlook
Setting ACT! history options in Outlook

Transferring and Restoring E-mail

You can transfer your ACT! e-mail to another computer, and then restore it on the new computer.

Note: If you use Microsoft Outlook with ACT!, you do not need to transfer and restore e-mail. If you use an e-mail program with ACT! that stores its files on your computer, rather than on a server, you may need to transfer e-mail.

The Transfer ACT! E-mail Wizard guides you through the process of establishing whether the e-mail database is shared, creating a copy (.zip file) of the ACT! e-mail database, and then placing the file in a specified location to restore to another computer. If users share the e-mail database, only one user needs to transfer the database.

To transfer an ACT! e-mail database

1. On the navigation bar, click **E-mail**.
2. From the **File** menu, click **Transfer E-mail**.

   The Transfer ACT! E-mail Wizard appears.

3. Follow the instructions on the wizard pages, clicking **Next** to advance.
4. When the transfer is complete, click **Finish**.

You can restore your transferred ACT! e-mail database (.zip file) to another computer. The E-mail Setup Wizard guides you through the process.

Note: To restore ACT! e-mail, close the ACT! E-mail window.

To restore a transferred ACT! e-mail database

1. From the **Tools** menu, click **Preferences**.
2. Click the **E-mail** tab, and then click **E-mail System Setup**.

   The Select E-mail Systems page appears.
3. Click **Restore transferred e-mail**, and then click **Next**.
4. Follow the instructions on the remaining pages, clicking **Next** to advance.
5. When the transfer is complete, click **Finish**.

The e-mail database is restored and your e-mail preferences are updated.

Chapter 20 Working with ACT! Document Templates

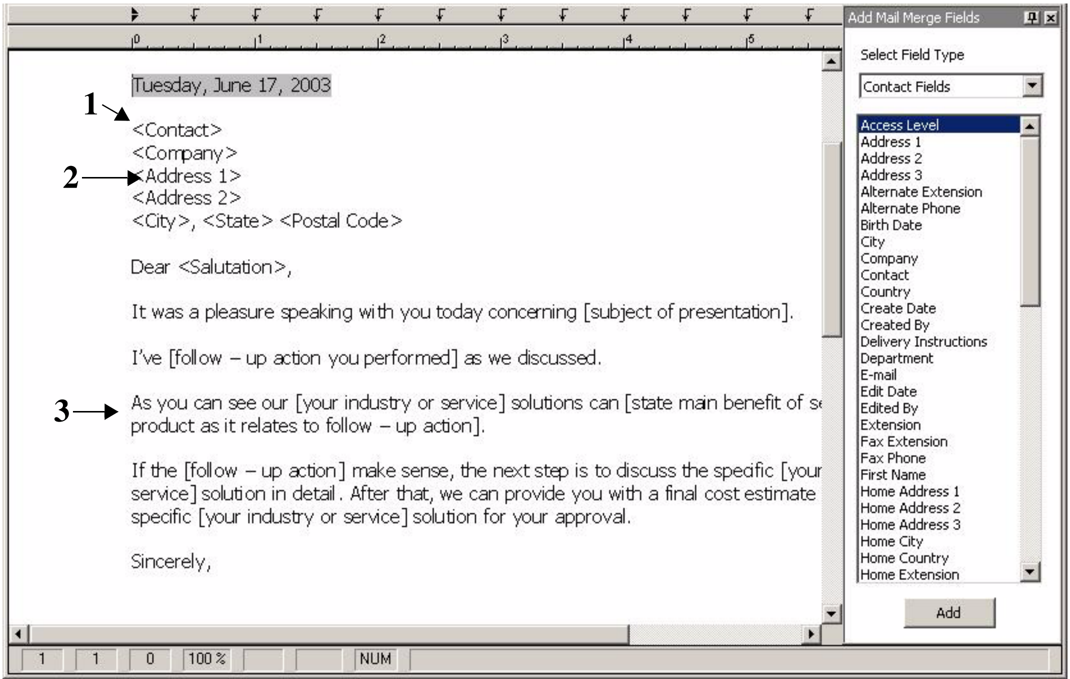
If you frequently compose similar documents, you can use a *template*, which is a form or outline that contains formatting and/or standard text. Templates allow you to quickly compose documents by automatically adding information, such as the name and address, from the contact record.

Templates are available to help you write letters, memos, faxes, and e-mail messages. A template can contain fields for contact information, standard text formatted as you prefer, your company logo, and so on. You can perform a mail merge using the template, and ACT! will replace the field markers with data from the records you have selected.

You can modify templates or create your own. (It is generally easier to modify a template than to create one.) You can save and reuse templates and share them with others.

In this chapter, you will learn to create and modify document templates.

Letter, memo, e-mail message, and fax templates contain special characteristics, as shown in the following illustration.



What's in a letter or memo template?

Feature	Function
1 Brackets	Angle brackets (< >) identify fields in an ACT! word-processing template. Brackets ([ ]) indicate where to type your custom information.
2 Fields	Contact fields, such as name and address. (You can add a field in ACT! to the template. When you create the document from the template, information from the contact record replaces the fields.)
3 Body	Text you write for this document. The body can include fields.

Creating Document Templates

When you create a document template, you begin with a blank template, add mail merge fields, and then format the template. The Add Mail Merge Fields dialog box is located in the right panel of the ACT! Word Processor window.

To create a document template

1. From the **Write** menu, click **New Letter/E-mail Template**.
2. In the **Add Mail Merge Fields** dialog box, select a field type from the **Select Field Type** list, such as **Contact Fields** or **My Record Fields**.
3. From the list of fields, select the field to add to your template, and then click **Add**. Continue inserting fields, changing field types as necessary.

   The fields are added to the template in a single line. For example:

   <L:Contact><MY:Company><MY:Phone><MY:Contact>

   Note: "MY" denotes fields from My Record, and "L" denotes field labels.

4. Arrange the fields as you want them to display on your document, using appropriate spacing, punctuation, and paragraph breaks.
5. Type the body of the document and format it as needed.

   For example, after adding text and arranging the fields, the template could appear as follows:

   Dear <Contact>,

   Contact <MY:Company> at <MY:Phone> to receive a free gift.

   Sincerely,

   <MY:Contact>

6. On the toolbar, click **Save**.

Modifying Document Templates

You can modify or format templates to suit your needs. For example, you can modify a letter template to create custom letterhead.

To modify a document template

1. From the **Write** menu, click **Edit Template.**
2. In the **Open** dialog box, select the template to modify, and then click **Open**.
3. Edit the template:
   - Add mail merge fields by selecting each from the **Add Mail Merge Fields** list and clicking **Add**.

   Note: Mail merge fields can contain information from a contact record or My Record. For example, you can add the Department field from a contact's record or add your company name from My Record.

   - Delete fields by selecting the text and pressing DELETE.
   - Add text by positioning the cursor and typing. You can format the text as usual.
4. Save the template with a different name (using the **File, Save As** command) or save the modified template.

Note: You can convert templates created in an earlier version of ACT! to this version. You can also convert templates created in Microsoft Word to ACT!.

See the following topics in the online Help.

About converting, upgrading, or downgrading databases
Selecting document templates

Chapter 21
Sending Faxes

ACT! supports the integration of third-party fax applications. The fax features available to you through ACT! are limited by the fax software product you select.

You can fax many of the documents that you can print in ACT!. You can fax reports, letters, proposals, quotes, or any Microsoft Word or ACT! Word Processor file. ACT! retrieves the contact's fax number from your address book. If your fax software supports it, you can use mail merge to send documents to one or more recipients using the fax software. For more information about using mail merge, see Chapter 20, "Working with ACT! Document Templates" and Chapter 22, "Creating Documents with the ACT! Word Processor."

In this chapter, you will learn to set up fax software, create a fax cover page, and fax a document.

Setting Up Fax Software

You set up your fax software to work with ACT! by identifying the fax software you have installed and adjusting or configuring your fax settings.

If you do not set up your fax software to work with ACT!, you will not be able to fax documents through mail merge or use ACT! for faxing; however, if your fax software works as a printer, you can still fax documents by selecting the fax software in the Print dialog box.

To set up fax software

1. From the **Tools** menu, click **Preferences**, and then click the **Communication** tab.
2. From the **Fax software** list, select the fax software to use.

Note: The Fax software list displays all fax software products that ACT! recognizes. If the list displays None, no compatible fax application is installed and the Fax Options button is not enabled. Therefore, you cannot set Fax Options.

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3. To review or configure your fax settings, click **Fax Options**. These options vary depending on which fax software is installed.
4. After adjusting the fax settings, close the Fax Options dialog box, and then click **OK**.

Creating a Fax Cover Page for One Contact

You can create and send a fax cover page for one or more contacts. The following steps explain how to create a fax cover page for one contact. To create and send a fax for multiple contacts, see Chapter 22, "Creating Documents with the ACT! Word Processor."

To create a fax cover page for one contact

1. Display the contact.
2. From the **Write** menu, click **Fax Cover Page**.

   The ACT! Word Processor opens and displays information from the contact record in the selected format.
3. Type the fax information.

   You can change display options.
4. Format and edit the contents of the document, as described in Chapter 22, "Creating Documents with the ACT! Word Processor."
5. When the document is finished, fax it as described in the next section.

See the following topic in the online Help.

Faxing documents to a single contact

Faxing Documents

When you have finished working with a document, you can fax it.

Note: To fax a document, you must have fax software set up. For more information, see "Setting Up Fax Software" in this chapter.

To fax a document

1. Open the document in the ACT! Word Processor.
2. From the **File** menu, point to **Send**, and then click **Fax**.

Chapter 22
Creating Documents with the ACT! Word Processor

Using either the ACT! Word Processor or Microsoft Word, you can compose letters and memos to print, fax, or e-mail to contacts, and you also can print labels and envelopes.

> **Note:** For instructions on using Microsoft Word to write letters and other documents, refer to that program's online Help system.

With the ACT! Word Processor, you can:

- Create and edit letters, memos, fax cover pages, and e-mail messages.
- Create and edit templates. For more information, see Chapter 20, "Working with ACT! Document Templates."
- Create documents for a single contact or use a mail merge to generate documents for multiple contacts.
- Format text.
- Create headers and footers.
- Check spelling.
- Insert files and hyperlinks in your documents.
- Edit, save, print, fax, or e-mail completed documents.

> **Note:** To fax or e-mail a document, you must have the appropriate software set up. For information about faxing, see Chapter 21, "Sending Faxes." For information about setting up e-mail, see Chapter 19, "Using E-mail."

In this chapter, you will learn to use the ACT! Word Processor to create and format documents.

Creating Documents for One Contact

You can create a document for one contact and print a label or envelope. For more information, see **"To print labels or envelopes" on page 112**.

To create a letter or memo for one contact

1. Display the contact.
2. From the **Write** menu, click **Letter** or **Memo**.

   The ACT! Word Processor opens and displays information from the contact record in the selected format.
3. Type the letter or memo information.

   Note: You can change display options from the View menu by clicking Normal or Page Centered.

4. Format and edit the contents of the document, as described later in this chapter.
5. When the document is finished, save, print, or send it in an e-mail message. For more information, see **"Completing Documents" on page 112**.

See the following topics in the online Help.

Printing documents
Saving documents
Sending documents in e-mail messages

Creating Documents for Multiple Contacts

You can use mail merge to create documents, based on a template, for one or more contacts. When you create documents using mail merge, you can choose to fax, e-mail, or print them. You can also choose to send the merged documents to your word-processing application so you can modify them individually.

Note: To fax a document through mail merge, you must have fax software installed. For more information, see Chapter 21, "Sending Faxes."

Scenario

Chris wants to send a standard welcome letter to several new contacts but wants to add a short, personal note to each one. To accomplish this, he can create a bulk mailing using mail merge, send the documents to his word-processing application, and then edit them.

To create a letter or memo using mail merge

1. Create or modify a template to contain the information, text, and formatting you want, and then save it. Close the Word Processor. For more information, see "Modifying Document Templates" in Chapter 20, "Working with ACT! Document Templates."
2. From the Contact List, find contacts to send the document to. For more information, see Chapter 7, "Finding Information in ACT!."
3. From the **Write** menu, click **Mail Merge**.
4. Follow the instructions on the **Mail Merge Wizard** pages, clicking **Next** to advance.
5. Click **Finish** when you are done.

Your documents are sent to the output chosen (printer, fax, file, and so on).

Editing and Formatting Documents

You can modify and format your document using the menu commands and tools on the toolbar, even if you used a template to create the document.

To edit and format your document, you might:

- Find and replace words or phrases.
- Change font attributes.
- Cut and paste text.
- Adjust page margins.
- Set tab stops.
- Create headers and footers.
- Add numbered or bulleted lists.
- Insert tables, files, and hyperlinks.
- Insert page breaks.
- Insert date and time stamps.

Tip: To change attributes for the entire document, click Select All from the Edit menu.

The following procedures refer to the ACT! Word Processor.

Adjusting Page Margins

You can change your page margins to adjust the amount of space in the top, bottom, left, or right margins of the page.

To adjust page margins

1. From the **File** menu, click **Page Setup**.
2. In the **Page Setup** dialog box, type the values for the **Left**, **Right**, **Top**, and **Bottom** margins, and then click **OK**.

Note: You can also change margins from the ruler by dragging the right or left margin marker to a new position.

Setting Page Breaks

The ACT! Word Processor automatically inserts page breaks when a page is full, but you can force a new page.

To insert a page break

1. Place the cursor where you want to start a new page.
2. From the **Insert** menu, click **Page Break**.

Creating Headers and Footers and Inserting Page Numbers

You can create a page header or footer to display on all pages of your document. For example, to print your company logo at the top of each page, place the logo in the header. Or, you might insert the page number into the footer. You can specify to display the header and footer on all pages or on all pages except the first page.

To create a header and footer

1. From the **View** menu, click **Header/Footer**.

   The header area appears with a dotted line around it. The cursor is positioned in the header.
2. Type the text to include in the header. From the **Insert** menu, insert the date, time, page number, or image.
3. To enter information in the footer, right-click, and then click **Switch**.
4. Type the text to include. From the **Insert** menu, click an option to insert the date, time, page number, or image.

Inserting the Date or Time

You can insert the date and time anywhere in a document. The steps for inserting the date or time are similar.

To insert the date

1. Place your cursor where you want the date to appear in the document.
2. From the **Insert** menu, click **Date**.
3. In the **Insert Date** dialog box, specify a **Short** (e.g., 3/25/05) or **Long** (e.g., Thursday, March 25, 2005) date format.
4. In the **Options** box, specify an option for updating the date in the document, and then click **OK**.

Setting and Clearing Tab Stops

You can set tab stops for the entire document, at the insertion point, or for a selected section of text. You can delete tab stops that you do not use.

To set a tab stop

1. Place the cursor on the line where you want to set the tab or select a block of text to be affected by the tab stop.

> **Tip:** To set a tab stop for the entire document, from the Edit menu, click Select All.

2. From the **Format** menu, click **Tab**.
3. In the **Tabs** dialog box, in the **Tab stop position** field, type the position (relative to the margin) for the tab stop. For example, to set a tab to indent text one-half inch from the margin, type .5.
4. From the **Alignment** box, select to align the tab **Left**, **Center**, or **Right**, or, to align at the decimal, select **Decimal**.
5. (Optional) Select **Right most tab** to create a tab stop at the right margin of the document.
6. Click **Set**, and then click **OK**.

> **Tip:** You can click on the ruler to set a tab.

Changing How Text Looks Using Font Attributes

Font attributes you can change include:

- Font type
- Font style
- Font size
- Subscript or superscript
- Text or background color

To change font attributes

1. Select the text you want to change.
2. From the **Format** menu, click **Font**.

Note: To have changes affect the entire document, from the Format menu, click Select All.

3. In the **Font** dialog box, select the font type, size, style, and so on.
4. Click **OK.**

Formatting Paragraph Alignment and Spacing

You can format a paragraph so that it is indented, aligned to the left or right margin, or has double-spaced lines.

To format a paragraph

1. Click in the paragraph.
2. From the **Format** menu, click **Paragraph**.
3. In the **Paragraph** dialog box, select options for line spacing, text alignment, text indenting, and so on.
4. Click **OK**.

Finding and Replacing Text

You can locate specific words or phrases in your document and then replace them with another word or phrase. For example, if you change a product name, you can quickly replace all instances of the name in your documents.

Caution: To avoid errors, check words and phrases before replacing them. For example, it you want to replace every instance of "mini" with "petite," the Replace feature gives you the option of replacing "mini" in the word "miniature," but you would skip that replacement.

To find and replace text

1. From the **Edit** menu, click **Replace**.
2. In the **Replace** dialog box, in the **Find what** field, type the word or phrase to locate.
3. In the **Replace with** field, type the replacement word or phrase.
4. Specify whether to search from the insertion point to the top of the document or from the insertion point to the bottom of the document. Click **OK**.
5. (Optional) To match the case of words, select **Match Case**.

See the following topics in the online Help.

About formatting paragraphs
Creating and formatting a bulleted list
Creating and formatting a numbered list
Formatting pages
Formatting tables
Formatting text
Inserting files into documents
Inserting hyperlinks into documents
Inserting images into documents
Using the Word Processing ruler

Completing Documents

When you have finished working with a document, you can save, print, or e-mail it. You can also print labels and envelopes with the contact's information on them.

Labels and envelopes are generated using a report template. The basic procedure is given here, but you can find more information in Chapter 15, "Producing Reports."

To save, print, or e-mail a document

- Open the document in the ACT! Word Processor, and then do one of the following:
  - To save the document: From the **File** menu, click **Save**; or, click **Save As** and type the **File name** for the document, and then click **Save**.
  - To print the document: On the toolbar, click the **Print** tool, select options for creating a history and printing an envelope, and then click **OK**.
  - To send the document in an e-mail message: From the **File** menu, point to **Send**, and then click **E-mail**.

To print labels or envelopes

1. In ACT!, from the **File** menu, click **Print**.
2. In the **Print** dialog box, from the **Printout Type** list, select **Labels** or **Envelopes**.
3. From the **Paper Type** list, select a label or envelope template.
4. Click **Print**.

   The Define Filters dialog box appears so that you can specify the information to appear on the label or envelope.
5. Select the options for the information. For more information, see Chapter 15, "Producing Reports."

Chapter 23
Using the Documents Tab

This chapter explains how attach documents to contact records using the Documents tab and how to merge fields between ACT! and Excel.

Attaching Documents to Contact Records

Using the Documents tab, you can view and edit documents created in another program, such as Microsoft Excel, and attach them to a contact record. The documents are not stored in the ACT! database; they remain in their original locations. Attaching them to a contact record using the Documents tab simply creates a link between the contact record and the document, and enables you to open and edit the document from within ACT!. All users who have access to a contact, group, or company can view the documents stored on the Documents tab.

When you add a document to the Documents tab, you attach it to a specific contact, group, or company. You can open the document from within ACT! and view and edit it in the original application if that application is installed on your computer.

For example, if you use an Excel spreadsheet to track a contact's sales data, and Excel is installed on your computer, you can browse for the spreadsheet from the Documents tab and attach it to the contact record. Then, you can open it, make changes to it, or add data to it from within ACT!. When you save the spreadsheet, it is saved in Excel.

Merging Field Values Using ACT! and Excel

The Documents tab has special functionality related to Excel spreadsheets. When you open an Excel spreadsheet in the Documents tab, you can merge ACT! field values with the spreadsheet cells.

For example, you might enter a contact's sales figures into the User 1 field on the User Fields tab in ACT!. You can set up field mapping so that the data in the User 1 field merges into a specified cell in an Excel spreadsheet.

Note: You must have Excel 2000 or later to merge fields in Excel.

See the following topics in the online Help.

About the Documents tab
Adding files to the Documents tab
Attaching documents to e-mail messages
Editing documents from the Documents tab
Mapping ACT! records to Excel spreadsheets

Chapter 24
Using the Dialer

Using the Dialer, you can dial contacts from within ACT! and time the calls you make. The Dialer works with your telephone and modem. This chapter explains the Dialer system requirements and how to set up the Dialer and make telephone calls.

Dialer Requirements

To use the dialer, you must have the following:

- A local or networked database.
- A modem that shares a line with your telephone.

  \- or -

  A telephone equipped with Telephone Application Programming Interface (TAPI) hardware and the appropriate telephone driver software installed on your computer. The Dialer uses TAPI technology included with Microsoft Windows. TAPI links your computer and your modem or telephone.

Note: Analog modems are supported.

For information about the features your modem supports, see your modem documentation or contact your modem vendor. For information about using your telephone with the Dialer, contact your telephone administrator or telephone system vendor.

Setting Up the Dialer

Before you can use the Dialer to place telephone calls, you must turn it on and set user preferences. User preferences tell the Dialer how to work with your telephone or modem.

To set up the Dialer

1. From the **Tools** menu, click **Preferences**.
2. Click the **Communication** tab, and then click **Dialer Preferences**.
3. In the **Dialer Preferences** dialog box, select **Use dialer** to turn on the Dialer.

4. Select your modem or telephone line from the **Modem or line** list, and then click **Setup** to configure the modem or telephone line.

   Refer to the Windows or manufacturer's documentation for information about setting up your modem or device.
5. Click **Properties**, and then select the location you will be calling from the **Location** list.

   You can create a new location or edit a location from the Phone and Modem Options dialog box.
6. Select one or both of the following options for the Dialer:
   - **Hide dialer after dialing** - This is the default setting, which closes the Dialer immediately after the number is dialed.
   - **Start timer automatically on outgoing calls** - This starts the timer as soon as the number is dialed.
7. Click **OK**.

Making Telephone Calls

When you call contacts, you can record the time of each call and record the outcome of the call in the History record.

To make a telephone call

1. Display the contact.
2. From the **Contacts** menu, click **Phone Contact.**
3. In the **Dialer** dialog box, double-click a telephone number.

Note: To call a number that is not listed, type it in the Number to Dial field. Enter all characters necessary for dialing from your locale, such as a number to access an outside line or a country code.

One or more of the following occurs:

- If you selected the Hide dialer after dialing option in the Dialer Preferences, the Dialer disappears.
- The Windows Call Status dialog box appears.
- If you selected the Start timer automatically on outgoing calls option in the Dialer Preferences, the Timer opens and begins timing the call.

4. When the telephone is answered, pick up the handset, and then click **Talk** in the **Call Status** dialog box.

See the following topics in the online Help

About the ACT! Dialer
Selecting contacts to call
Recording call histories

Tracking Your Sales

Chapter 25
Creating and Closing Opportunities

An *opportunity* is a potential sale to a contact. You can track opportunities from beginning to end through the sales process, which is divided into stages. At each stage, you can determine the likelihood that the sale will close, and you can use this information to determine your sales pipeline. Information about opportunities can include the products and services the buyer is interested in, and you can use this information to generate a quote for the customer.

The ACT! Sales Cycle process is included with your installation of ACT!. You can use the ACT! Sales Cycle process or create a customized process. Users with an Administrator or Manager role can create and modify the process, stage, and product lists. For information on modifying sales processes, see Chapter 26, "Forecasting and Reporting Opportunities."

In this chapter, you will learn to create opportunities; view the Opportunity List; generate quotes; close, delete, and reopen opportunities; and schedule follow-up activities.

Opening and Working with Opportunities

When you open an opportunity, you can select the process, the stage within the process, and the status, such as open or inactive. Using the tabs in the Opportunity dialog box, you can select the products or services the customer is interested in, include details, and generate a quote.

You can reassign an opportunity to another ACT! user or make an opportunity private so that other ACT! users cannot view it.

Understanding Stages in a Process

Each process has a set of stages associated with it that indicate where the opportunity is in the sales cycle. For example, a stage might be Initial Communication or Negotiation. The percentage assigned to each stage indicates the likelihood of closing the sale. When you open an opportunity with a new contact, you might assign the "Initial Communication" stage (10% chance of successfully closing the sale), and when you schedule a meeting to make a presentation to the contact, you might update the stage to "Presentation" (40% chance of successfully closing the sale). The probability, or percent, is automatically listed when you select a stage, but you can change it if you want.

Discounting Products and Services

When you select products and services to include in the opportunity, you can discount individual products. You can also create a new product, such as "Special," and discount the entire opportunity. The product cost and price per unit are specified in the Product List; you can change them while opening an opportunity.

Scenario

Chris opens an opportunity for a contact who requested more information about several products. He sets the stage to "Needs Assessment" and selects the products the contact is interested in. As an incentive to purchase the products, Chris offers a discount on products purchased within the next two weeks.

To open an opportunity

1. From the toolbar on the **Contact Detail** view, **Contact List** view, **Opportunities** tab, or **Opportunity List** view, click the **New Opportunity** tool.
2. Complete the following fields in the **Opportunity** dialog box:
   - In the **Opportunity Name** field, type a name for the opportunity.
   - In the **Contact** field, select the contact to associate the opportunity with.

Note: You can select only one contact per opportunity, but you can also associate an opportunity with groups and companies.

- (Optional) In the **Associate With** field, click the browse button (...) to select the groups or companies to associate the opportunity with.
- Under **Status**, select **Open**, **Closed- Won**, **Closed - Lost**, or **Inactive**.
- From the **Process** list, select the process to use for the opportunity, and then from the **Stage** list, select the stage.

Note: When you select a stage, the percentage associated with the stage appears in the Probability field. The percentage represents the probability of the opportunity successfully closing. You can change the percentage.

- (Optional) In the **Probability** field, change the default percentage associated with the stage.
- From the **Est. Close Date** calendar selector, select the estimated closing date.

3. On the **Products/Services** tab, do the following:
   a. Select a product or service from the **Name** or **Item #** list.
   b. In the **Quantity** field, specify the quantity for the product or service. For a service, specify the quantity by entering the time in hours, such as 1.5 for one-and-a-half hours.
   c. (Optional) To adjust the price of the product per unit, type the price in the **Adj. Price** field or type the percent discount in the **Discount** field.
   d. To add a product, click **Add** and select a product from the **Name** list; to delete a product, select the product, and then click **Delete**.
4. (Optional) On the **User Fields** tab, type additional information in **Opportunity Fields 1-8**. For information about defining Opportunity Fields 1-8, see Chapter 36, "Customizing Fields."
5. To enter more details, click the **Details** tab, and then type the details.
6. (Optional) On the **Opportunity Info** tab, complete the following:
   - From the **Open date** field, select a different date.
   - From the **Close date** field, select a close date if the opportunity staus is Closed - Won, Closed - Lost, or Inactive.
   - In the **Reason** field, type the reason for closing or deactivating the opportunity, or select a reason from the list if the opportunity staus is Closed - Won, Closed - Lost, or Inactive.

- From the **Referred By** list, select the name of the person who referred the opportunity.
- From the **Record Manager** list, select the name of the Record Manager.
- From the **Competitor** list, select any competitor.

7. (Optional) To make the opportunity private, select the **Private** check box.
8. To schedule an activity regarding the opportunity, click **Follow Up**, complete the fields on the tabs in the Schedule Activity dialog box, and click **OK**.
9. Click **OK**.

Editing Opportunities

If you are an Administrator or Manager, you can reassign any opportunity. You can reassign an opportunity you opened to another ACT! user or make it private. Other ACT! users cannot view private opportunities.

See the following topics in the online Help.

Adding and discounting opportunity products or services
Changing estimated closing dates of opportunities
Closing and reopening opportunities
Editing or deleting opportunities

Viewing the Opportunity List

From the Opportunity List, you can view and print a list of your opportunities and the opportunities of other users. All users, regardless of role, can view the Opportunity List.

Note: If you do not have access to the contact associated with a public opportunity, the opportunity displays in the list, but you cannot see the contact’s name.

You can filter the list of opportunities so that you see only certain opportunities, such as opportunities that have been closed and won. The status bar displays the number, the weighted total, and the grand total of opportunities. The weighted total of opportunities is based on the percentage representing the chance the opportunity will close and the sum of the product prices in the opportunity.

You can also export a list of opportunities to Microsoft Excel. To export a list of opportunities to Excel, you must have Microsoft Excel 2000 or a later version installed, and you must have an Administrator, Manager, or Standard role.

To export a list of opportunities

1. On the navigation bar, click **Opportunity List**.
2. Filter the opportunities using the filters. If the filters do not display, click **Show Filters**.
3. On the toolbar, click the **Export to Excel** tool.

   The list displays in Microsoft Excel. You can click the Opportunities Pivot Chart tab to view a pivot chart of the opportunities.

You can also view an opportunity pipeline or graph. See Chapter 26, "Forecasting and Reporting Opportunities."

See the following topics in the online Help.

Exporting and viewing lists of opportunities
Filtering opportunities from the Opportunity List
Printing the Opportunity List

Generating Opportunity Quotes

You can create a quote that includes details of the opportunity, such as the quantity of each product in the opportunity, the price per product, and the total cost of the products.

You must have installed Microsoft Excel and Word 2000 or later to generate quotes.

You can set a preference to prompt users to enter a quote number when they generate a quote.

To create an opportunity quote

1. On the navigation bar, click **Opportunity List**, and then locate and double-click the opportunity.
2. On the **Products/Services** tab, click **Quote**.
3. If necessary, in the **Quote Number** field, specify the quote number, and then click **OK**.

   The quote displays as a Microsoft Word document. You can view, save, or print it. A history is created when you fax or print quotes.

See the following topic in the online Help.

Setting quote preferences

Closing, Deleting, and Reopening Opportunities

You can close an opportunity or make it inactive. When you close an opportunity, you can specify your reason for closing it. If necessary, you can reopen a closed opportunity, changing the Open Date to the current date and the Close Date to None.

Users with an Administrator or Manager role can delete any opportunity. Users with a Standard role can delete only opportunities that they are the Record Manager of.

To close an opportunity or make it inactive

1. On the navigation bar, click **Opportunity List**, and then locate and double-click the opportunity.
2. To close the opportunity, under **Status**, select **Closed - Won** or **Closed - Lost**.

   - or -

   To make the opportunity inactive, under **Status**, select **Inactive**.
3. On the **Opportunity Info** tab, select the reason for closing the opportunity from the **Reason** list, and then click **OK**.

Follow-up Activities for Opportunities

You can schedule a follow-up activity related to an opportunity. You schedule a follow-up activity from the Opportunity dialog box by clicking the Follow Up button. Details from the opportunity are automatically included in the activity.

See the following topic in the online Help.

Scheduling follow-up activities

Chapter 26
Forecasting and Reporting Opportunities

Visual representations of opportunties, such as pipelines or graphs, help you manage your sales. In addition to the sales cycle provided with ACT!, you can create, edit, or delete processes, stages, and lists of products. You can customize fields on the Opportunity's User Fields tab (see "Chapter 36, Customizing Fields"). You can also import or export a list of stages or products.

In this chapter, you will learn to:

- Create an opportunity pipeline or graph.
- Create and modify opportunity processes and product lists.
- Run opportunity reports.

Forecasting Opportunities

You can create an opportunity pipeline or graph, which are visual representations that help you forecast and manage opportunities. For example, you can view the number of opportunities you have in each stage in a process, and then look up the opportunities you have at a specific stage.

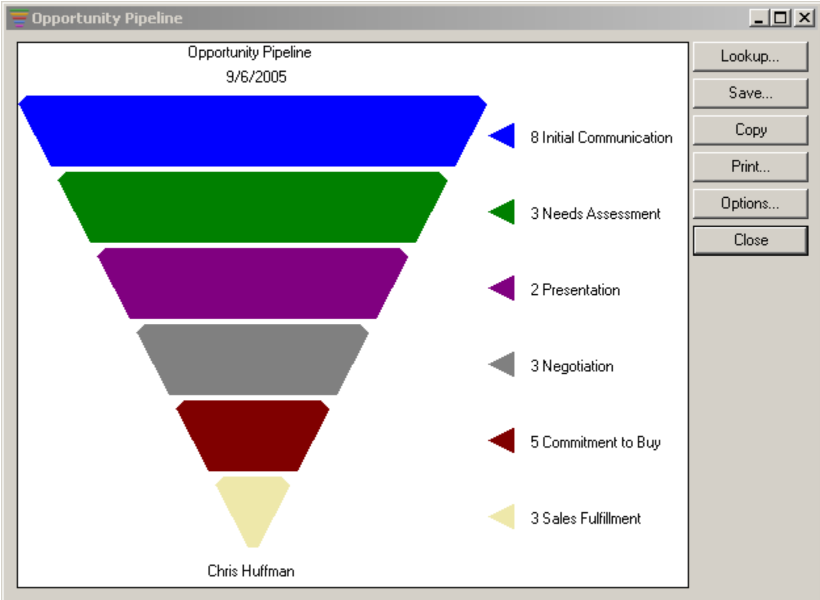
Creating Opportunity Pipelines

An *opportunity pipeline* shows the number of open opportunities you have at each stage for a specific process.

You can save the pipeline as a .bmp or . jpg file, copy and paste it into another document, and print it.

To create a pipeline

1. On the navigation bar, click **Opportunity List**.
2. On the toolbar, click the **Opportunity Pipeline** tool.



3. In the **Opportunity Pipeline Options** dialog box, complete the following:
   - Under **Create graph for**, select the contact or lookup option to use to create the graph.
   - Under **Display data for sales managed by**, select **All users** or **Selected users**. If necessary, select the users from the list.
   - From the **Process** list, select the opportunity process to create a graph for.
   - To change the color for a stage, select the color to change, click the browse button (...), select a new color, and then click **OK**.
   - In the **Header/Footer** fields, type the information to appear in the header and footer of the graph.
4. Click **Graph**.

   The Opportunity Pipeline appears. Click a colored band on the pipeline to view the opportunities it represents.

Creating Opportunity Graphs

You can graph opportunities for a specific date range, user, status, and value (total value or total quantity), and you can specify the type of graph that appears, such as a line graph or bar graph. You can save the graph as a .bmp or .jpg file, copy and paste it into another document, or print it.

To create an opportunity graph

1. On the navigation bar, click **Opportunity List**.
2. On the toolbar, click the **Opportunity Graph** tool.
3. In the **Graph Options** dialog box, in the **General** tab, complete the following:
   - Under **Create graph for**, select the contact or lookup option for creating the graph.
   - Under **Graph**, select the status of the opportunity to graph.
   - Under **Display data for**, select **All users** or **Selected users**. If you chose Selected users, select the users from the list box.
   - Under **Dates to Graph**, select the **Graph by** option and the **Starting** and **Ending** dates.
   - Under **Value to graph**, select to graph by **Total** or **Total Quantity**.
   - In the **Header/Footer** fields, type the information to appear in the header and footer.
4. Click the **Graph** tab and complete the following:
   - Under **Type**, **Style**, and **Graph size**, select the type, style, and size of the graph.
   - Under **Scale**, select to automatically scale the graph, or select **Define,** and then specify the **Minimum** and **Maximum** values.
   - To display grid lines, select **Show horizontal grid lines** or **Show vertical grid lines**.
   - To specify the color of the bars or lines, in the **Graph** field, click the browse button (...), select a color, and then click **OK**.
   - To specify the text color, in the **Text** field, click the browse button (...), select a color, and then click **OK**.
   - To specify the background color, in the **Background** field, click the browse button (...), select a color, and then click **OK**.

5. Click **Graph**.

   The Opportunity Graph appears. Click a bar on the graph to view the opportunities represented by the bar.

See the following topics in the online Help.

Changing the appearance of opportunity graphs or pipelines
Copying opportunity graphs or pipelines
Creating lookups from opportunity pipelines
Looking up opportunities
Printing opportunity graphs or pipelines
Saving opportunity graphs or pipelines

Customizing Opportunity Processes and Products

You can create, edit, or delete processes, stages, and products in a list. You can also import or export a list of stages or products. When importing and exporting stages, you use a *comma-separated value* (CSV) format, which uses commas to separate the items in the list. You cannot delete a stage that is in use.

Users with an Administrator or Manager role can modify opportunity processes and product lists.

Creating and Modifying Processes

You can create or modify a process, including adding, editing, deleting, importing, and exporting opportunity stages from a list. You can also delete a process. However, you must always have at least one process available.

To create a process and add stages

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Process List**.
2. On the **Create, edit, or delete opportunity processes** page, under **Process Tasks**, click **Create New Opportunity Process**.
3. On the **Enter opportunity process name and description** page, specify the appropriate information, and then click **Next**.
4. On the **Customize stages for** page, click the **Name** cell for the first stage, and then type the stage name.
5. (Optional) Click the **Description** cell for the stage, and then type a description.
6. Click the **Probability** cell, and then type the percentage that represents the likelihood of the opportunity being closed.

7. Click **Add** to add another stage; when you have added all stages, click **Finish**.

   The process appears in the list on the Create, edit, or delete opportunity processes page.

See the following topic in the online Help.
Working with an opportunity process

Creating and Modifying Product Lists

You can add, edit, and delete products from a product list, and you can import or export products using a CSV file.

To add, edit, or delete products from a product list

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
2. In the **Manage Product List** dialog box, do the following:
   - To add a product, click **Add**, and then type the product information.
   - To edit a product, click the cell to edit, and then type the information.
   - To delete a product, select the product, click **Delete**, and then click **Yes** to confirm the deletion.

To import a list of products

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
2. To import a list of products, click **Import**.
3. In the **Import Products** dialog box, click **Browse**, locate the list, and then click **Open**.
4. (Optional) Select **Replace products with the same name** to have ACT! automatically replace existing products, if products in the imported list have the same name.
5. (Optional) If the file has column labels, select **Source file has column headers**.
6. Click **Import**.

To export a list of products

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
2. To export a list of products, click **Export**.
3. Specify where to save the file, type the file name, and then click **Save**.

Running an Opportunity Report

You can generate an opportunity report to display opportunities that are open, closed and won, or lost. You can generate the report for yourself or for other users.

To run an opportunity report

1. From the **Reports** menu, point to **Opportunity Reports**, and then select an opportunity report.

   The Define Filters dialog box appears. The options that display on the General tab depend on the type of report selected.
2. From the **Send the report output to** list, select an output type.
3. Under **Opportunities**, select the opportunities to include in the report: **Opportunities**, **Closed - Won**, **Closed - Lost**, or **Inactive**.
4. From the **Date Range** list, select the date option.

   - or -

   Click the **Custom** button and use the calendar selector to select start and end dates.
5. Under **Use data managed by**, select whether to include **All users** or **Selected users**. If necessary, select users from the list.
6. Click **OK**.
   - If you selected to preview the report, the report appears.
   - If you chose to print the report, the **Print** dialog box appears. Select the print options, and then click **OK**.
   - If you selected another option, you are prompted to save the report. Type a file name and select a file type.

See the following topics in the online Help.

About reports
Printing reports
Running reports
Summary of ACT! reports

Synchronizing Databases

Chapter 27
Understanding Synchronization

ACT! users can share data by using a common, or main, database to maintain contact, group, and company information. Often, users in different locations have subsets or "copies" of the main database that they make changes to, but then they need to share those changes. The process of updating copies of a database so that they have the same information is called *synchronization*. Synchronization tracks changes to data in multiple places and transports the change from one database to another.

A remote location uses a remote database of the contacts and their related information. A remote database can have all of the data contained in the main database or just a subset of that data. Users synchronize data between a main database and one or more remote databases; synchronizing updates the main and remote databases so the information in them matches. See the sections "Understanding Synchronized Data" and "The Synchronization Process" in this chapter for more information about the data that synchronizes and the synchronization process.

Note: You can also send and receive data, such as contact records, between your ACT! database and Personal Digital Assistant (PDA). Synchronization between an ACT! database and a PDA is not covered in this *User's Guide*. Refer to the *ACT! Link for Palm OS® User's Guide* or the *ACT! Link for Pocket PC User's Guide* for installation, configuration, and usage information.

The "Synchronization Models" section in this chapter shows examples of simple and complex synchronization models based on two company organization charts. These models represent two possible synchronization scenarios.

Note: You cannot synchronize between products or versions. For example, if your main database is using ACT! Premium/Professional for Workgroups 2006, then the remote database must use ACT! Premium/ Professional for Workgroups 2006. Likewise, if the main database is ACT! 2006, the remote database must be ACT! 2006.

In this chapter, you will learn about:

- Synchronized data.
- The synchronization process.
- Synchronization transport connection types and methods.
- Synchronization models.
- User security roles for synchronization.

Understanding Synchronized Data

The main database contains all contact records. You may want to share all or some of those records with users. To specify the data a user can access, you create a Sync Set.

A *Sync Set* contains the list of users who can access the remote database and a collection of contact records, including group and company records associated with the contacts in the Sync Set. You can define the Sync Set to include all records the users can access in the remote database or records selected using a query.

For example, you can use a query to create a Sync Set containing all the contacts located in a specific regions. When you create the query, 35 contacts live in the specified region. If a new contact located in the region identified in the query is added to the database, the number of records in the Sync Set changes.

Sync Sets define the records users can access and limit the size of remote databases, reducing the time it takes to synchronize data.

Data That Synchronizes

- Contact, company, and group records including notes, histories, opportunities, activities as defined in the Sync Set.
- Attachments and database supplemental files (letter, report, envelope, and label templates; layouts; and queries) if the option is set for these items to synchronize.
- User records.
- Database settings and preferences, such as name prefixes.
- Database features, such as custom activities and priorities, events, and product lists.
- Database field changes from main database to remote database(s); the remote database(s) must lock out users to apply the changes.

Data That Does Not Synchronize

- E-mail messages not attached to a database record.
- Personal settings and preferences, such as colors and custom toolbars, menus, and columns.
- Personal supplemental files, such as documents or reports.

Differences Between Main and Remote Databases

- On the main database, only Administrator or Manager users can add or delete fields and custom activity types.
- A remote database can only be created from the main database.
- Only remote database users can set a synchronization schedule.

The Synchronization Process

You may synchronize data for the following reasons:

- To share data from your office database with another database, such as a database on your laptop computer.
- To share data with the users in your office who have their own databases.
- To share data with a remote user, such as someone who travels or someone in a remote office.

Synchronization Set Up

When the Administrator or Manager user on the main database sets up synchronization, he or she:

- Determines which users require contact information.
- Determines which contact records they need.
- Defines an appropriate Sync Set.
- Creates a remote database using the Sync Set information.
- Delivers the database to the remote location.
- Turns on synchronization for the main database (Sync Server) so that it is available for incoming communications from the remote database.

For more information, see "Setting Up Synchronization" on page 145.

Remote database users who need access to more contact records than those defined in their Sync Set can request additional records from the main database using a Subscription List. For more information, see "Adding Contact Records Using Subscription Lists" on page 153.

Move Data Between Databases

Synchronization requires a transport connection (a way to move data) between the main database (Sync Server) and the remote database. Several transport connection types and synchronization methods can be used. For more information, see **"Synchronization Transport Connection Types and Methods" on page 139.**

Synchronization Sessions

Synchronization is initiated by a remote database. The main database "listens" for incoming communication from the remote database. Synchronization occurs in the background so users can continue to work in both the main and remote databases.

Note: The remote database must be locked to apply the changes resulting from synchronization. The synchronization process automatically locks the database.

During synchronization, ACT! checks the records in the sending and receiving databases. If changes occurred to the same field of the same record in both databases, the last change made will be the one that is kept. Users can use several methods to verify if a synchronization session has occurred and if all changes have been applied. For more information, see **Chapter 30, "Verifying Synchronization."**

Synchronization Expiration Period

To make sure data is current, when the remote database is created, the Administrator or Manager user specifies an expiration period within which the remote database must synchronize with the main database. Once the ability to synchronize has expired, the remote database remains usable and can synchronize one last time with the main database. After that, to resume synchronization with the main database, the remote database must be recreated.

Disable Synchronization

You can disable synchronization between a main database and a remote database. Once disabled, you cannot reestablish synchronization, instead, you must recreate the remote database. For more information, see **"Disabling Synchronization" on page 148.**

Synchronization Transport Connection Types and Methods

To synchronize data between a main and remote database, you specify a transport connection type and a method. The following transport connection types and methods are available:

Network (Inside a Firewall) This transport connection type lets you synchronize internally on a network via a direct connection or dial-up networking. Some examples of transport types are TCP/IP, Local Area Network (LAN), Virtual Private Network (VPN), or Remote Access Service (RAS).

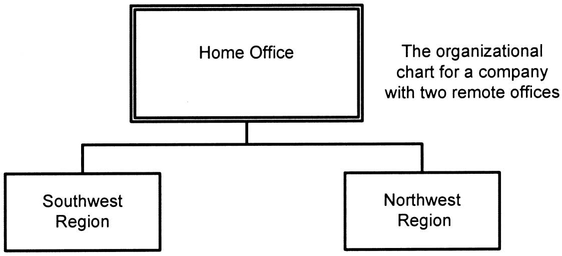
Application synchronization This method requires ACT! to be running. The main database must be open and listening for incoming synchronizations. This method is used by the Network (Inside a Firewall) transport connection type.

Synchronization Models

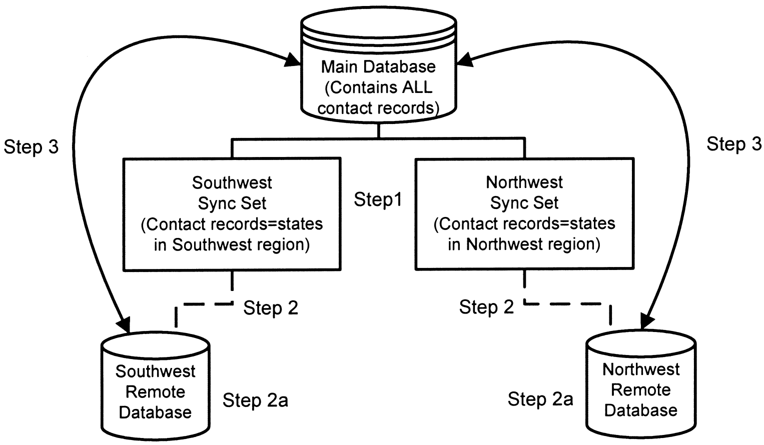
This section contains two diagrams of synchronization models.

Simple Synchronization Model

Company Organizational Chart



Synchronization Process

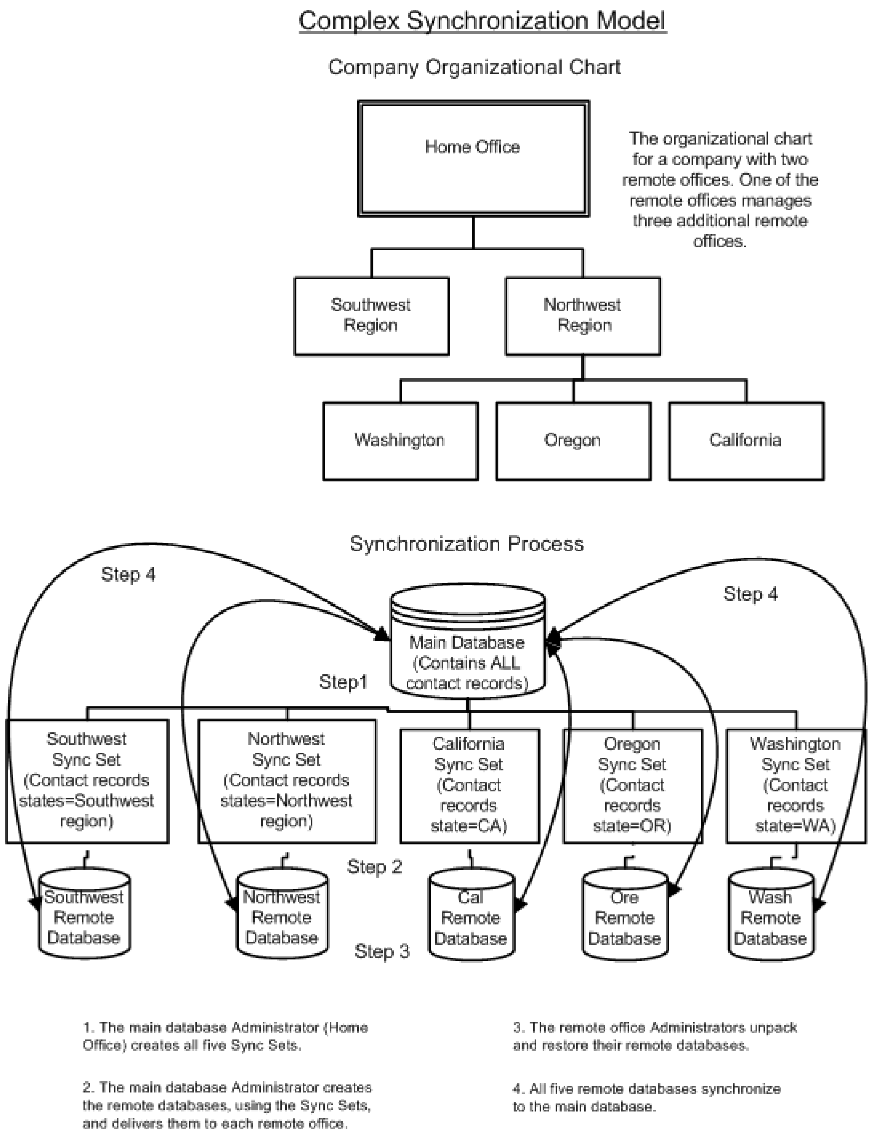


1. The Administrator of the main database (at the Home Office) creates the Southwest and Northwest Sync Sets.

2. The Administrator creates two remote databases using the contact data in each Sync Set and delivers one remote database to each remote office.

2a. The Administrators of the remote offices unpack and restore their own remote database.

3. Each remote database synchronizes to the main database.


Complex Synchronization Model
Company Organizational Chart
Home Office
The organizational chart for a company with two remote offices. One of the remote offices manages three additional remote offices.
Southwest Region
Northwest Region
Washington
Oregon
California
Synchronization Process
Step 4
Step 4
Main Database (Contains ALL contact records)
Step1
Southwest Sync Set (Contact records states=Southwest region)
Northwest Sync Set (Contact records states=Northwest region)
California Sync Set (Contact records state=CA)
Oregon Sync Set (Contact records state=OR)
Washington Sync Set (Contact records state=WA)
Step 2
Southwest Remote Database
Northwest Remote Database
Cal Remote Database
Ore Remote Database
Wash Remote Database
Step 3
1. The main database Administrator (Home Office) creates all five Sync Sets.
2. The main database Administrator creates the remote databases, using the Sync Sets, and delivers them to each remote office.
3. The remote office Administrators unpack and restore their remote databases.
4. All five remote databases synchronize to the main database.

User Security Roles for Synchronization

The following user security roles apply to synchronization. If you are an Administrator or Manager user, you should be familiar with the security permissions for each user's role before you set up synchronization. For more information, see **Chapter 32, "Setting Up Users."**

Administrator and Manager users on a main database can:

- Set up synchronization (includes creating and recreating remote databases and disabling synchronization).
- Define the Sync Set of users and data that will synchronize.
- Modify any Sync Set.
- Modify any Subscription List for any Sync Set.
- Modify the expiration period for any remote database.
- Print synchronization settings for each remote database.

Standard users on a remote database can:

- Initiate synchronization to the main database.
- Modify the Subscription List for the remote database they belong to.
- Perform remote database administration (if permission is assigned) for the remote database they belong to, including modifying the expiration period.
- Modify the synchronization schedule and print synchronization settings for the remote database they belong to.

Administrator and Manager users on a remote database can:

- Do everything a Standard user can, including Manager users can be assigned permission to perform remote administration. Administrator users already have this ability and the permission cannot be removed.
- Create and modify Sync Sets; however, they cannot create remote databases.

Chapter 28
Synchronizing for Administrators

This chapter describes the Administrator or Manager user tasks for setting up synchronization for the main database.

Note: For more information about folder sharing rights and network security related to synchronization, refer to your operating system's documentation.

In this chapter, you will learn about:

- Planning for synchronization.
- Setting up synchronization.
- Disabling synchronization.

Caution: If you are using a previous version of ACT! and synchronize with remote databases, see the *Start Here* before planning or setting up synchronization in this version.

Planning for Synchronization

Good planning ensures successful synchronization. The following questions will help you determine your needs.

Question	Result
What is the size of my main database? How many contact records do I have?	Helps you determine whether you need to perform database maintenance before setting up synchronization. For more information, see Chapter 34, "Maintaining Databases." Helps you decide whether to share all contact records with all users or limit records to certain users or groups of users.
What user roles are currently in the main database?	The roles you assign to users in the main database will be the same in the remote database(s). Assigning user roles is important when considering synchronization. For example, if you assign a user in the main database a Standard role, then the user has that role in the Sync Set for the remote database. You can add a permission for the Standard user to perform maintenance on the remote database. For more information, see **Chapter 32, "Setting Up Users."**
How many users need access to contact records in the main database? Will all users receive the same data?	Helps you determine the number of remote databases you need and which contact records users can access. This allows you to control the size of each user's database. **Caution:** A remote database that will have 2 or more gigabytes (GB) of data must be on a server running ACT! Premium/Professional and Microsoft SQL Server 2000 Standard Edition.
Where will the remote database be used - on the network or another computer?	Helps you determine the type of database (Microsoft SQL Server 2000 Standard Edition or Microsoft SQL Server 2000 Desktop Engine) and how you deliver the remote database.
How will I transfer data (synchronize)?	The transport connection types and methods available determine how you intend to synchronize data. See "Synchronization Transport Connection Types and Methods" on page 139.
How often should users synchronize?	If many users share a large amount of data, you may want the Administrator user *of the remote database* to set up synchronization to occur automatically at a specified time of day or week. Users can still manually synchronize at any time.
How much time is allowed between synchronizations?	The time allowed (expiration period) can be between 2 - 365 days. When you create the remote database, you set the expiration period. Remote users are periodically reminded that the expiration time is approaching. The expiration period can be modified.
Do you want to synchronize attachments?	Attachments, such as letters or spreadsheets, can increase the time it takes to synchronize. Only files attached to contacts in the Sync Set will synchronize. You can select options to allow attachments to be included when the remote database is created, to not allow attachments to be included, or to not allow attachments to synchronize at all. Once the options are set, you cannot change them. To change the options, you must recreate the remote database.
Do you want to synchronize database supplemental files?	Database supplemental files, such as layouts, reports, templates, and documents, can increase the time it takes to synchronize. Once the option is set for supplemental files to synchronize, you cannot change it. To change the option, you must recreate the remote database.

Setting Up Synchronization

The ACT! Synchronization Panel contains most of the tasks necessary to set up and manage synchronization. Both the main and remote database contain this panel, but not all tasks are available for that specific database. The following sections should be followed in the order presented to set up synchronization.

Enabling Synchronization on Main Databases

For a main database to be active and allow for the creation of remote databases, synchronization must be enabled on the main database. Enabling activates the other synchronization tasks.

To enable synchronization of a main database

1. From the **Tools** menu, click **Synchronization Panel**.
2. In the **Admin Tasks** box, click **1. Enable Synchronization**.
3. Click **Yes** to confirm.

Creating Sync Sets

Administrator or Manager users on the main or remote database can create a Sync Set, but only the Administrator or Manager users on the *main database* can create a remote database using the Sync Set.

The following scenario should help you understand Sync Sets. It follows the simple synchronization model shown in "Synchronization Models" on page 140.

Scenario

Chris wants his sales department to have the most up-to-date contact, group, and company information, including notes, histories, activities, and opportunities data. Because Chris' staff is divided into two U.S. regional departments, Northwest and Southwest, he wants to limit the contact records each sales person receives to only contacts in the regions where they sell.

From the main database, Chris can create two Sync Sets, one including only contact records from the northwest region and another for the southwest region. To capture the correct records, each Sync Set requires query criteria that looks for all the states in each region. Then, Chris can create two remote databases for his sales staff. That way, Chris' employees receive only the contact information that they need from the main database.

To create a Sync Set

1. From the **Tools** menu, click **Synchronization Panel**.
2. In the **Admin Tasks** box, click **2. Manage Sync Set**.
3. In the **Sync Set Tasks** box, click **Create New Sync Set**.

   The Enter Sync Set Name and Description page appears.
4. Type a new name and description for the Sync Set, and then click **Next**.
5. Follow the instructions on each page to select users and contact records. Click **Next** to advance until you reach the Sync Set Confirmation page, and then click **Finish**.

Users with the appropriate permissions can create a Subscription List to access more contact records than those assigned to them in the Sync Set. For more information, see "Adding Contact Records Using Subscription Lists" on page 153.

See the following topics in the online Help.

Copying Sync Sets
Deleting Sync Sets
Editing Sync Sets
Selecting criteria for Sync Sets
Selecting users for Sync Sets
Understanding Sync Sets

Creating Remote Databases

You can only create a remote database on the main database. Creating a remote database requires you to:

- Give the database a unique name (limited to 32 characters) and description.
- Assign a Sync Set to determine the contents.
- Set an expiration period and options for synchronizing attachments and supplemental files.
- Set the synchronization connection type.
- Build the remote database using the assigned Sync Set to pull data from the main database; password-protect the remote database file.

To create a remote database

1. From the **Tools** menu, click **Synchronization Panel**.
2. In the **Admin Tasks** box, click **3. Create Remote Database**.

3. Follow the instructions on each page, clicking **Next** to advance.
4. Click **Finish** to create the remote database.

   ACT! creates a remote database (.rdb) file. You deliver this file to your remote users/locations as described in the next section.

See the following topics in the online Help.

Setting options for synchronizing file attachments
Setting or changing the expiration period for remote databases
Setting the option for synchronizing supplemental files

Delivering Remote Databases

After you have created the remote database, deliver the file to the remote users/locations and instruct them how to install it. You can deliver the file in one of the following ways:

FTP You can place the .rdb file on an FTP site and allow the users to access the site and download the file to their local drive.

Network connection You can place the .rdb file on a network drive that users can access and ask that they copy the file to their local drive.

Copy to CD You can copy the .rdb file to a CD, and then give the CD to users.

Note: If you password-protected the remote database file, make sure you provide the password to the users. They will need it when they unpack and restore the remote database.

See "To unpack and restore the remote database" on page 151 for details about installing the remote database.

See the following topic in the online Help.

Delivering remote databases

Turning On Synchronization for Main Databases

You must turn on the synchronization server to allow the remote database to synchronize with the main database. Even though a remote user initiates synchronization, the main database must be set to listen for communications so it can receive the synchronization data from a remote database. Once the main database is set to listen for incoming synchronizations, it remains on until an Administrator or Manager user turns it off.

To turn on synchronization for the main database

1. On the main database, click **Tools**, point to **Synchronize**, and then click **Accept incoming syncs**.
2. In the **Sync Server Port** dialog box, the default port number of 65100 appears. To use a different port number, type it, and then click **OK**.

   A progress bar appears.
3. At the **Server successfully started** message, click **OK**.

   A check mark indicates that synchronization is turned on.

Disabling Synchronization

If you want to discontinue synchronization between a main and remote database(s), you can disable, or break, the synchronization relationship. When you break a relationship, you cannot re-establish it. The Administrator or Manager user on the main database can recreate the remote database and deliver it again to the remote users.

From the main database, an Administrator or Manager user can disable synchronization in two ways:

- Disable synchronization for a remote database and, if desired, allow one last synchronization before the remote database is disabled. The remote database receives a notification statement in the synchronization log that synchronization has been disabled and one last synchronization session will occur.
- Disable synchronization for the main database.

From a remote database, the Administrator or Manager user can disable the remote database so that it no longer synchronizes to the main database. Once a remote database has been disabled in this manner, it is no longer a remote database. If you subsequently enable synchronization on this database, it becomes a host or main database with all the synchronization tasks of a main database

The following steps describe how to disable synchronization for a remote database (on the main database).

To disable synchronization for a remote database and allow one last synchronization

1. On the main database, from the **Tools** menu, click **Synchronization Panel**.
2. In the **User Tasks** box, click **Manage Database**.

3. On the **Select a Database** page, select a remote database, and then in the **Admin Tasks** box, click **Disable Sync**.
4. At the prompt, click **Yes**.
5. At the prompt to allow the database to synchronize one last time before disabling, click **Yes**.

See the following topics in the online Help.

Disabling or stopping synchronization
Recreating remote databases

Chapter 29
Synchronizing for Users

This chapter describes the remote database tasks that a Standard user and above can perform. Only a remote database user can initiate synchronization. In this chapter, you will learn about:

- Unpacking and restoring remote databases.
- Synchronizing data (manual and automatic).
- Adding contact records using the Subscription List.

Unpacking and Restoring Remote Databases

Before you can begin using a remote database and synchronizing data, you must unpack and restore the remote database the Administrator user delivered to you. *Unpacking and restoring* is the process of setting up the remote database and all of its files in the new location.

To unpack and restore the remote database

1. From the **File** menu, point to **Restore**, and then click **Database**.
2. In the **Restore Database** dialog box, select **Unpack and Restore Remote Database**, and then click **OK**.

   The Restore an ACT! Remote Database dialog box appears.
3. In the **Select the remote database file to restore** field, type the name and location of the remote database to restore or click **Browse** to locate the file.

   This is the .rdb file the Administrator delivered to you.
4. In the **Database Location** field, a default location to store the database appears. If necessary, type another location for the restored database, or click **Browse** to select a location.
5. If multiple users will access the database, select **Share this database with other users**.
6. If the remote database file is password-protected, in the dialog box, type the password the Administrator provided, and then click **OK**.

Once the database is restored, you can open and begin using it. Then, you can synchronize your data at any time.

Synchronizing Data

As a remote database user, you initiate synchronization with a main database. You can synchronize your data as often as you like, or you can set a sync schedule to automatically synchronize at a specified time. You can continue using the remote database during synchronization; it does not impede your work since it runs in the background. However, any information that is changed or entered during the synchronization session will not be reflected in the main and remote database until the next synchronization session.

Synchronizing Manually

You can synchronize your data at any time.

To manually synchronize data

- On a remote database, from the **Tools** menu, point to **Synchronize**, and then click **Synchronize Now**.

When synchronization is complete, all changes to data should be reflected in the main and remote database, except for information entered during the synchronization session.

Setting Up Automatic Synchronization

You may want to set up automatic synchronization to occur hourly, daily, weekly, or monthly. You can set a start date and time for the automatic synchronization to begin.

To set up automatic synchronization

1 On the remote database, from the **Tools** menu, click **Synchronization Panel**.

2. In the **User Tasks** box, click **Set Sync Schedule**.
3. On the **Sync Schedule** page, in the **Occurs** box, do the following:
   a. Select a schedule option. By default, None is selected.
   b. Complete the options for the selected scheduling item.
4. In the **Occurs At** box, do the following:
   a. In the **Start Date** field, select a date to start automatic synchronization. The current date appears by default, but you can select another date.
   b. In the **Start Time** field, select or type a time to start automatic synchronization. The current time appears by default, but you can change the time for any option except Hourly.

5. Click **Finish** to save the settings.

See Chapter 30, "Verifying Synchronization" to learn how to check if your synchronization was successful.

Adding Contact Records Using Subscription Lists

You may need to access more contact records than you receive during synchronization. The records you receive are determined by the Sync Set assigned to your remote database; however, you can use a Subscription List to add contact records that you can access in the main database.

The contacts you add to your Subscription List will always synchronize unless you remove them from the Subscription List or delete them from the database.

To add contact records using the Subscription List

1 From the **Tools** menu, click **Synchronization Panel**.

2. In the **User Tasks** box, click **Manage Subscription List**.

3. Select the Sync Set to add contact records to, and then click **Next**.

   Note: Users on a remote database will not see the page to select a Sync Set. They can only access their Sync Set.

   The Manage Subscription List page appears; contact records that are included in your Sync Set are indicated by a check mark in the Sync Set column.

4. In the **Subscription Tasks** box, click **Add Contacts to Sync Set**.

5. In the **Contacts** dialog box, select the contact(s) from the list on the left, and then click the right-arrow button to add them.

6. When you are finished selecting contacts, click **OK**, and then click **Finish**.

The additional contact records will appear in your database after your next synchronization.

See the following topics in the online Help.

Resetting Subscription Lists
Understanding Subscription Lists

Chapter 30
Verifying Synchronization

Verifying synchronization is one of several tasks that Administrator, Manager, and Standard users can perform. In this chapter, you will learn to view synchronization logs and look up the last records synchronized.

Viewing Synchronization Logs

The synchronization log includes the details and errors logged for the synchronization sessions between the synchronization server and remote database(s). You can view the synchronization log for the main and remote database(s).

> **Note:** A main database may synchronize with several remote databases, which can have varying expiration periods. The longest expiration period determines when the synchronization log is purged. For example, if the expiration period on a remote database is 30 days, ACT! maintains synchronization log entries for 31 days. After that time, older entries are purged when maintenance is performed on the database.
>
> If a main database has several remote databases with expiration periods varying from 10 to 90 days, then ACT! will maintain synchronization log entries for 91 days. After 91 days, older entries are purged when maintenance is performed on the database.

To view the synchronization log

1. From the **Tools** menu, click **Synchronization Panel**.
2. In the **User Tasks** box, click **View Sync Log**.

> **Tip:** To print the synchronization log, right-click in the grid, and then click Select All. Press CTRL+C to copy the details, open Notepad or Word, and then press CTRL+V to paste the details. Print the details from Notepad or Word, as applicable.

Looking Up the Last Records Synchronized

Users in the main and remote databases can look up the details of the last synchronization session. Users of a main database can also search for changes received from any or all remote databases, and users of remote databases can search for changes received from the main database. You can use filters to search by last synchronization session or a date range.

Note: The results of the lookup are filtered by a user's access to the records.

To look up records from the last synchronization

1 From the **Lookup** menu, point to **Advanced**, and then click **Last Synchronized**.

2. In the **Last Synchronized** dialog box, select **Last Session** or **Date Range**. If you select Date Range, in the **From** and **To** fields, enter the dates.

3. In the **Search these records** area, select a **Record Type** and **Database**.

   Default settings for these fields differ for the remote and main databases.

4. In the **Look in** area, all options are selected by default; click an option to remove it from the search.

5. Click **Find Now**.

   The results of the search appear in the lower pane of the dialog box.

6. Do one of the following:

   - To create a lookup of the last data, click **Create Lookup**.
   - To clear all fields and create a new search, click **New Search**.
   - To close the dialog box, click **Close**.

Administering ACT!

Chapter 31
Importing and Exporting Data

You can import data into an open ACT! database from another ACT! database or from selected programs. For example, to consolidate all of your records, you may want to import records into your company ACT! database from your personal ACT! database and from Microsoft Outlook. You can export data from an ACT! database into another ACT! database or to a delimited text file for use in another program.

> **Tip:** We recommend you read “Tips for successful data imports and exports” in the online Help before you import or export data to or from ACT!. This will help you successfully import or export data and understand the data that is imported or exported.

Using the Import Wizard, covered later in this chapter, you select the file that records will come from (the source file), the type of records to import, and the merge options for the imported data.

Using the Export Wizard, also covered later in this chapter, you select the type of file to export to (destination file), the records to export, and other export options.

You can export data to Microsoft Excel from the list views. The Export to Excel tool creates an Excel spreadsheet; the data that displays in each list view appears in the Excel columns.

You can also import and export product lists or drop-down lists. For more information about importing or exporting product lists, see Chapter 26, "Forecasting and Reporting Opportunities." For more information about importing or exporting drop-down lists, see Chapter 36, "Customizing Fields."

Additionally, you can import and export a contact, group, or company record attached to an e-mail message. For more information, see Chapter 19, "Using E-mail."

In this chapter, you will learn about the user roles for importing and exporting data and how to use the Import and Export Wizards, map fields, and export ACT! list views data to Microsoft Excel.

User Security Roles for Importing and Exporting Data

If you are the Administrator user, you should be familiar with each user's role as it relates to importing and exporting data. For more information, see Chapter 32, "Setting Up Users."

Administrator and Manager users can:

- Access the Import and Export Wizards.
- Import or export product lists and drop-down lists.

Standard users and above can:

- Use the Export to Excel tool for the Contact, Group, Company, and Opportunity List views.
- Import or export an ACT! record attached to an e-mail message, however, when a Standard user imports a record from an e-mail message, and the record already exists, the existing record is updated only if the Standard user is the Record Manager. For more information about the Record Manager, see "Record Manager" on page 177.

Import Wizard

You can use the Import Wizard to import data from selected prior versions of ACT!, from one ACT! 2006 (8.x) database into another (same product tier), or from other programs, such as Microsoft Outlook.

Note: You can import data from ACT! versions 3.x - 6.x and ACT! 7.01 - 7.04. You cannot import data from ACT! 7.0 (you must upgrade to ACT! 7.01 or above to import the data). You cannot import data from an ACT! 2006 (8.x) Premium database to an ACT! 2006 (8.x) database.

In the Import Wizard, you identify the source file (the database or program you are importing records from), select the type of records to import, and set merge options for the imported data. When you import data, the Import Wizard helps you determine where to put the data from the source fields in the ACT! database. This is called *mapping fields*. You can accept the mapped fields as shown in the Import Wizard, or you can change the mapped fields.

Importing ACT! Data

When you import ACT! data, you may create duplicate records in your ACT! database. You can set merge options to specify how ACT! handles these potential duplicate records. ACT! performs a primary match, but you can enable Duplicate Checking in Preferences to have ACT! perform a secondary match. Additionally, you can select an option to display each potential duplicate record. When the potential duplicate record is displayed, you can choose to create a new record, perform the merge, or skip the import.

To import ACT! data

1. Open the ACT! database to import data to.
2. From the **File** menu, click **Import**.

   The Import Wizard appears.
3. Follow the instructions on the pages, clicking **Next** to advance. Specify options, including:
   - The file type (ACT! 3.x - 6.x, ACT! 7.x, ACT! 8.x).
   - The file name and location.
   - The type of records to import.
   - How fields should be mapped.
4. Click **Finish**.

The Importing Data progress indicator appears.

Importing Data from Other Programs

When you import data from other programs, first import the contact records, then any group records, and finally any company records. Some programs let you import appointments, notes, journal entries, or tasks as ACT! notes or activities.

You can import data from the following programs and file types into an ACT! database:

- dBase - versions III - IV (contacts only).
- Goldmine - delimited text.
- Lotus Organizer - delimited text.
- Maximizer - delimited text.
- Microsoft Outlook 2000 or later.
- Microsoft Outlook 2003 with Business Contact Manager (BCM). (You cannot import BCM contacts directly into ACT!. Drag the BCM contacts into Outlook Contacts, and then import them from Outlook into ACT!.)

- Microsoft Access - delimited text.
- Microsoft Excel - delimited text.
- Palm OS Desktop.
- Peachtree by Sage contact information - delimited text.
- QuickBooks contact information - delimited text.
- Sage SalesLogix CRM - delimited text.
- vCalendar/iCalendar - .vcs.
- vCard - .vcf.

To import contact data from any program not listed, first open the data file in its original program, then save it in a format supported by ACT!, such as a delimited text file. Then you can import the data into ACT!.

Scenario

Chris would like to import his Outlook contacts into his ACT! database. To do this, he will use the Import Wizard to import contact records from Outlook.

To import data from other programs

1. Open the ACT! database to import data to.
2. From the **File** menu, click **Import**.

   The Import Wizard appears.
3. Click **Next**.
4. On the **Specify Source** page, select the type of program or file to import from, and then type the file name and location of the source.

   Note: For some programs, such as Microsoft Outlook, you may not need to specify a location.

   The pages of the Import Wizard will differ according to the type of program or file you are importing from.
5. Follow the instructions on the pages, clicking **Next** to advance, and then click **Finish**.

The Importing Data progress indicator appears. The import process may take several minutes.

Export Wizard

You use the Export Wizard to export ACT! data to another ACT! database or to a delimited text file for use in other programs. In the Export Wizard, you select the type of file to export to, the records to export, the field mapping (if exporting to an ACT! database), and other export options.

> **Note:** You cannot export ACT! 2006 (8.x) data to a previous version ACT! database. You cannot export data from an ACT! 2006 Premium for Workgroups database to an ACT! 2006 database, and vice versa.

Exporting ACT! Data to Other ACT! Databases

You can export contact, group, and company records to another ACT! database. You can specify whether to export only the current lookup, the current record, or all records. For example, to reduce the size of your database, you can create a lookup of contact records with the status of Inactive, export these contacts to another database, and then delete them from the original database. This allows you to access the inactive records if you need them.

To export ACT! data to a new ACT! database, first create the new database, then use the Export Wizard. One way to do this is to save an empty copy of the ACT! database you are exporting from.

To create an empty ACT! database

1. Open the ACT! database you want to export from.
2. From the **File** menu, click **Save Copy As**.

   The Save Copy As dialog box appears.
3. In the **Database Name** field, type a name for the new database.
4. In the **Database Location** field, keep the default location or click **Browse** and select a new location for the database.
5. By default, **Share this database with other users** is selected; click to clear the option.

   > **Tip:** We recommend that you keep the database shared.
6. In the **Options** box, select **Create an empty copy of the database**.
7. By default, in the **Database Version** field, the database version you are using appears; keep the default.

8. Click **OK**.

   Another Save Copy As dialog box appears for you to select the Administrator user for the empty database.

9. In the **Choose Contact** field, select an existing contact from the list (this should be a user record), or in the **User Name** field, type a new Administrator user for the database.

10. (Optional) Type a password for the user name, and then type it again to confirm.

11. Click **OK**.

    ACT! creates an empty database.

12. Close the empty database and open the database to export from.

Next, export ACT! data into the empty database.

To export ACT! data to another ACT! database

1. Open the ACT! database to export data from.
2. From the **File** menu, click **Export**.

   The Export Wizard appears.

3. Follow the instructions on the pages, clicking **Next** to advance. Specify options including:
   - The file name and location, including the user name and password for the database.
   - The type of records to export.
   - How to map fields.
   - Merge options for the records.
4. On the **Completing Export Wizard** page, read the information. If it is correct, click **Finish**.

   If the information is not correct, click Back until you reach the page that needs correction.

   When you click Finish, the Exporting Data progress indicator appears.

Exporting ACT! Data to Delimited Text Files

You can export ACT! data to a delimited text file for use in another program. For example, you can create a file for someone who does not have access to ACT!.

When exporting to a delimited text file, you export contact records, then group records, and finally company records. You cannot export all three record types at one time.

To export ACT! data to a delimited text file

1. Open the ACT! database to export data from.
2. From the **File** menu, click **Export**.

   The Export Wizard appears.
3. Follow the instructions on the pages, clicking **Next** to advance. Specify options including:
   - The file name and location.
   - The type of records to export.
   - Field delimiter characters (comma or tab) and field names.
   - Field order.
4. On the **Completing Export Wizard** page, read the information. If it is correct, click **Finish**.

   If the information is not correct, click Back until you reach the page that needs correction.

   When you click Finish, the Exporting Data progress indicator appears.

Mapping Fields

ACT! has default mapping of contact, company, and group fields so you can easily import data from selected programs or export data to another ACT! database or delimited text files. If a default map is not available for the program you are importing from or exporting to, or the map does not meet your needs, you can create a custom map. For example, you may want to modify the map for Outlook to map a contact's name to a custom field in ACT! called "Stockholder." When exporting data to a delimited text file, you can insert and remove fields.

You can also map data to multiple fields. For example, you can map a contact's first name to the "First Name" and "Salutation" fields.

You can save custom maps and reuse them if you import data from the same program or export data to another ACT! database or delimited text file.

The following steps describe how to manually map fields when importing data.

To manually map fields when importing data

1. Follow the steps in **"Importing ACT! Data" on page 161.**
2. When you reach the **Contact Map**, **Group Map**, or **Company Map** page (as applicable), do the following:
   a. In the **Map from this field** column, select the field to map from.
   b. In the **To this Field** column, select a field, and then click the arrow to select a different field.
3. Repeat steps 2a and 2b for all fields to map.

Note: To restore the default mapping, click Reset.

4. (Optional) To save the custom map for later use, click **Save Map**.
   - In the **Open** dialog box, select a folder to save the map to, type a File name, and then click **Save**.
5. When finished, click **Next** and follow the wizard to completion.

Exporting ACT! List View Data to Microsoft Excel

Standard users and above can export the Contact List, Group List, Company List, and Opportunity List data to Microsoft Excel. Excel version 2000 and later is required.

Before exporting to Excel, you can customize the columns on the views and filter the data on the Opportunity List. The columns and data in the ACT! list views are exported exactly as shown to Excel columns.

Note: If a column has multiple fields, such as multiple product names for an opportunity, only the name of the first item will export.

To export ACT! list view data to Excel

- On the **Contact List**, **Group List**, **Company List**, or **Opportunity List**, click the **Export to Excel** tool.

Excel opens and displays the data. If you export data from the Opportunity List, ACT! provides an Excel pivot chart and table, too.

See the following topics in the online Help.

About importing and exporting data
Confirming matched records during merging
Loading and saving map files
Mapping fields
Selecting contact, group, and company merge options
Tips for successful data imports and exports

Chapter 32
Setting Up Users

The task of managing users is assigned to an Administrator role. If you are a single user of a database, you should understand the security role of an Administrator, since the individual who creates a database is automatically given the Administrator role. ACT! includes five user security roles: Administrator, Manager, Standard, Restricted, and Browse. See "Users' Security Roles" in this chapter for descriptions of these security roles, including role restrictions.

When setting up a database for multiple users, the Administrator user can add users to the database. The Administrator also can import contacts from another ACT! database or application, and then make those contacts users. For more information about importing contacts, see Chapter 31, "Importing and Exporting Data." As the Administrator adds users, he/she assigns security roles, specifies log-on access, and adds or removes permissions. Permissions let users perform extra tasks in the ACT! database. See "Adding or Removing Permissions" in this chapter.

In this chapter, you will learn about users' security roles and which features can be used by each role, and how to create users, add or remove permissions, and change users' log-on status.

Users' Security Roles

User security roles determine the areas of ACT! that a user can access and the tasks the user can perform. The primary consideration in assigning roles is to provide users access only to the functions they need to perform their job.

To appropriately assign roles to the users you add to your database, carefully consider security and feature access. Ask yourself the following questions when adding a user and assigning his or her role:

- What is the user's main purpose in the database? Will he or she simply be adding contact records, notes, and histories?
- What will the user's responsibilities be? Is he or she responsible for maintaining the database, creating templates, initiating sychronization, or is he or she simply managing contact records?

The following sections describe each security role including role restrictions and recommendations for assignment. In the following roles, *record access* refers to users who can see a record. For more information about security and record access, see Chapter 33, "The ACT! Security Model."

Browse Role

This role is the most limited. Browse users can:

- View data they have record access to.
- Run and print reports.
- Perform lookups and Advanced Queries.
- Use Internet Services.
- Print calendars, address books, and contact, company, and group information.
- Run ACT! update (but not update the schema).
- Scan for duplicate contacts.
- Set user preferences, including e-mail set up.
- Customize navigation bar and columns.
- Back up and restore personal supplemental files.

Restricted Role

This role allows access to only certain areas of the application. Restricted users can:

- Do everything Browse users can do.
- Create contacts and opportunities, schedule activities, including activities in an activity series.
- Change record access for records that they are the Record Manager of.
- Perform mail merges.

Standard Role

This role is the most common user role. The Standard role gives users access to most records and data. This is the default user role in ACT!. Standard users can:

- Do everything Restricted users can do.
- Access most areas of the application.
- Create groups and companies.
- Modify report and word-processing templates.

- Customize menus and toolbars.
- Synchronize data, including database and handheld synchronization (if granted permission for handheld synchronization).
- Be granted other permissions. These permissions can be removed, too. For more information, see "Adding or Removing Permissions" in this chapter.

Manager Role

This role is designed for users who require system-wide access but do not need to use administrative tools. This role is typically assigned to people who have other users reporting to them and need to set up sychronization or customize ACT!. Manager users can:

- Do everything Standard users can do.
- Perform tasks in all areas of ACT! except creating and managing users and database maintenance. They can be granted permission to perform remote administration on a remote database they belong to.
- Define fields and layouts.
- Manage synchronization setup.
- Customize data such as priority types, custom activities, opportunity processes, and so on for the entire database.
- Delete records, except other users' private records.
- Change record access of records, except other users' private records.

Administrator Role

This role lets the assigned user perform all tasks and gives the right to use all areas of the application and all data in the database. Administrator users can:

- Do everything Manager users can do, except be assigned permissions; Administrators have all permissions by default and the permissions cannot be removed.
- Access all data in the database.
- Perform database maintenance and restore or delete databases.
- Can update the database schema.
- Create and manage users.

The Administrator role is automatically assigned to the creator of a database; it may also be assigned to a person or persons in your Information Technology department. Once installation is complete, the Administrator is typically the person who manages the database. This includes managing user information, updating and maintaining a clean database, running database-wide reports, and customizing ACT! for the company's needs.

Tip: Limit the number of users you assign Administrator and Manager roles. This helps protect the integrity of your system and makes it easy to track changes made to system and application data.

Features and Access by User Role

The following table lists ACT! features and functions and the roles that can access them. The term "my" in the table means that the user is the Record Manager for that item. The Record Manager owns the record. For example, "Delete my contacts" means the user can delete the contacts he/she is the Record Manager of. For more information, see Chapter 33, "The ACT! Security Model."

Note: (1) Indicates the user can be assigned this permission.

Feature or Function	Administrator	Manager	Standard	Restricted	Browse
Accounting link					
Perform accounting link tasks	X	X(1)	X(1)		
Activities					
Integrate (update/remove) activities & tasks with Outlook	X	X	X	X	
Manage Activity Types	X	X			
Manage Events	X	X			
Manage Priorities	X	X			
Schedule/edit/delete activities	X	X	X	X	
Schedule/edit/delete activities for other users	X	X			
Activity Series					
Create/edit	X	X	X		
Delete my activity series templates	X	X	X		
Delete other users' activity series	X	X			
Manage other users' activity series (change Record Manager)	X	X			
Schedule activity series	X	X	X	X	
Communications					
Create/edit/delete word-processing templates	X	X	X		
Enable e-mail	X	X	X	X	X

Feature or Function	Administrator	Manager	Standard	Restricted	Browse
Enable word processing	X	X	X	X	
Transfer/restore ACT! e-mail	X	X	X	X	X
Companies					
Create/edit companies	X	X	X		
Delete my companies	X	X	X		
Delete other users' companies	X	X			
Manage other users' companies (change Record Manager)	X	X			
Contacts					
Create/edit contacts	X	X	X	X	
Delete my contacts	X	X	X		
Delete other users' contacts	X	X			
Manage my contacts record access	X	X	X	X	
Manage other users' contacts (change Record Manager; change record access)	X	X			
Conversion					
Convert databases	X	X	X		
Convert ACT! 3.0-6.0 supplemental files	X	X			
Customization					
Access Layout Designer	X	X			
Customize columns	X	X	X	X	X
Customize menus and toolbars	X	X	X		
Customize navigation bar	X	X	X	X	X
Data Exchange					
Export data (includes product lists and drop-down lists)	X	X			
Export record via e-mail	X	X	X		
Export to Excel (list views only)	X	X	X		
Import data (includes product lists and drop-down lists)	X	X			
Import record via e-mail	X	X	X		
Database Mgmt/Maintenance					
Back up personal files	X	X	X	X	X
Back up database	X	X	X(1)		
Copy database	X	X			
Copy/move contact data	X	X	X(1)		
Define fields (customize fields and manage drop-down lists)	X	X			
Delete database	X				
Lock database	X	X	X(1)		
Perform check and repair	X	X(1)	X(1)		
Perform remote administration	X	X(1)	X(1)		
Remove old data	X				
Restore personal files	X	X	X	X	X
Restore database	X	X(1)	X(1)		
Run ACT! Update (not all users can update the database schema.)	X	X	X	X	X

Feature or Function	Administrator	Manager	Standard	Restricted	Browse
Scan for duplicate contacts	X	X	X	X	X
Share database	X				
Groups					
Create/edit groups	X	X	X		
Delete my groups	X	X	X		
Delete other users' groups	X	X			
Manage other users' groups (change Record Manager and control user access)	X	X			
Internet Services					
Use Internet Services	X	X	X	X	X
Lookups					
Perform lookups & Advanced Queries	X	X	X	X	X
Opportunities					
Create/edit opportunities	X	X	X	X	
Delete my opportunities	X	X	X		
Delete other users' opportunities	X	X			
Manage opportunity process	X	X			
Manage opportunity products	X	X			
Manage other users' opportunities (change Record Manager; change record access)	X	X			
Preferences					
Manage user preferences	X	X	X	X	X
Manage database preferences	X	X			
Printing					
Print calendars, address books, contact, company, and group information	X	X	X	X	X
Reporting					
Create/edit reports	X	X	X		
Run reports	X	X	X	X	X
Synchronization					
Enable synchronization	X	X			
Initiate synchronization (remote database only)	X	X	X		
Perform handheld device sync	X	X(1)	X(1)		
Manage Subscription List	X	X	X		
Manage synchronization set-up	X	X			
User Management					
Manage users	X				

To check your user security role

1. From the **Help** menu, click **About ACT!**.
2. Click the **Database Info** button.

The Database Information dialog box displays the name and size of the database you are using, as well as your user name and role.

Creating Users

The Administrator user can add a user or create a user from an existing contact.

To create a user

1. From the **Tools** menu, click **Manage Users**.
2. In the **User Tasks** box, click **Create New User**.
3. Follow the instructions on the pages, clicking **Next** to advance.
4. Click **Finish** when done.

Adding or Removing Permissions

You can add or remove permissions to let users perform other tasks with ACT!. Permissions can be assigned to Manager and Standard users and do synchronize.

Note: If a permission was assigned in ACT! 2005 (7.x), when the database is updated to ACT! 2006 (8.x), the permission is retained.

The permissions that can be assigned and removed are:

Accounting link tasks The user can perform Accounting (back-office) tasks when a linked back-office package is configured to work with ACT!.

Handheld device Sync The user can externally set up and perform handheld device synchronization.

Remote administration The user can back up, restore, and check and repair a remote database he or she belongs to.

Administrator users are assigned all permissions, and the permissions cannot be removed.

To add or remove a permission

1. From the **Tools** menu, click **Manage Users**.
2. In the list of users, select the user, and then click **Edit User Information**.
3. In the **Manage User Tasks** box, click **Add Permissions**.
4. To add a permission, in the **Available Permissions** list, select a permission, and then click the right-arrow button.

5. To remove a permission, in the **Added Permissions** list, select the permission, and then click the left-arrow button.

Note: Permissions that appear as dimmed cannot be removed.

6. Continue adding or removing permissions as needed, and then click **Finish**.

Changing Users' Log-on Status

You can change a user's log-on status to inactive if the user will not be accessing the database for a period of time. You can change the user back to active status using the same procedure.

Note: Inactive users can still own data including contacts and activities.

To change a user's log-on status

1. From the **Tools** menu, click **Manage Users**.
2. In the list of users, select the user.
3. In the **User Tasks** box, click **Edit User**.
4. Click **Next** to advance to the **Specify Access** page, and then under **Logon Access**, select **Inactive** or **Active**.
5. Click **Finish**.

See the following topics in the online Help.

About user roles and permissions
About users
Deleting users
Editing user information

Chapter 33
The ACT! Security Model

In the ACT! security model, access to database information is established by defining a user role. This user role determines the ACT! features, such as menu commands, the user has access to and the functions, such as deleting records, the user can perform. For more information, see "Users' Security Roles" on page 169.

Security also includes the concepts of Record Manager and record access. In this chapter, you will learn about:

- The Record Manager and changing the Record Manager for a contact record.
- Record access and how to find contacts by record access.
- Changing the record access to private for contacts.

Record Manager

The Record Manager is the user that "owns" the record. By default, ACT! assigns the user who created the record as the Record Manager, but the user can be changed.

The Record Manager information is useful when running reports; you can filter the data in the report by Record Manager. To produce effective reports, it is a good practice to assign the person actively managing the relationship or the specific record as the Record Manager.

The Record Manager can do the following:

- Assign the record to another user.
- Delete the record.
- Assign access to the record. See "Record Access" in this chapter.

Note: Administrator and Manager users, as well as the Record Manager, can assign the record to another user or delete the record.

The record types in ACT! that have a Record Manager are:

- Contacts
- Groups
- Companies
- Opportunities
- Notes
- Histories
- Activity series

Changing the Record Manager

If you are the current Record Manager, you can assign the record to a Restricted or above user.

Note: Administrator and Manager users can also change the Record Manager for one of the record types.

The following steps describe changing the Record Manager for a contact record.

To change the Record Manager for a contact record

1. On the **Contact Detail**, click the **Contact Info** tab.
2. In the **Record Manager** field, from the list, select a user.

You can add a Record Manager field to a custom layout to specify the record owner for a contact, company, or group record. For more information, see **"Adding Fields and Objects to Layouts" on page 207.**

See the following topics in the online Help.

About ACT! security
Changing the Record Manager

Record Access

Record access refers to who can see the record. Access for a record can be public or private.

Public access means the record is seen by all users.

Note: All user records are public, and the record access cannot be changed.

Private access is the most restrictive. Other ACT! users cannot view a private record.

The following ACT! record types can be private:

- Contacts - Other ACT! users cannot view the fields for a private contact record. Any related data such as notes, histories, activities, and so on may be viewable depending on group or company associations.
- Groups - Other ACT! users cannot view the group fields for a private group record. Othre users may be able to access contacts belonging to a group, as well as any group-related data such as notes and histories.

Note: A public group that has public subgroups cannot be made private; a private subgroup cannot be made public if any group above it in the hierarchy is private.

- Activities - Other ACT! users can only view the duration and day of private activities on their calendars. No details display.
- Activity Series - Other ACT! users cannot edit or schedule a private activity series.
- Notes - Other ACT! users cannot view a private note, even when the note is shared with other users.
- Histories - Other ACT! users cannot view a private history.
- Opportunities - Other ACT! users cannot view a private opportunity.
- Secondary Contacts - Other ACT! users cannot view a secondary contact, even if they have access to the primary contact.

Standard users and above can set record access preferences for new contact, group, and opportunity records. For more information, see Chapter 2, "Setting Preferences for How ACT! Works."

Changing the Record Access to Private for Contacts

Restricted and Standard users who are the Record Manager of contacts can change the record access to private. Administrator and Manager users can change the record access to private for contacts to which they have access.

Note: User records cannot be changed; they are always public.

To change the record access for one contact

1. Open the **Contact Detail** view.
2. Right-click, point to **Edit Contact Access**, and then click **Make Contact Private**.
3. At the message prompt, click **Yes**.

To change the record access for more than one contact

1. Open the Contact List.
2. Click **Enable Tag Mode**, and then select the contacts.
3. Right-click, point to **Edit Contact Access**, and then click **Make Contact Private**.
4. At the message prompt, click **Yes**.

The Updating contacts progress indicator appears, and then closes when all records are updated. If one or more contacts could not be changed, a message appears.

Tip: Follow the same steps to change the record access to public for contacts. The same user role restrictions apply.

See the following topic in the online Help.

Changing the record access to public for contacts

Chapter 34
Maintaining Databases

Regular maintenance keeps your database running efficiently. Backing up your data ensures that you can recover from system failures with minimal data loss, because you can restore the data.

Database maintenance includes:

- Backing up and restoring a database.
- Backing up and restoring personal files.
- Checking and repairing a database.
- Removing old data.
- Deleting a database.
- Sharing a database.

In this chapter, you will learn to:

- Protect data.
- Back up the database.
- Lock the database.
- Perform some database maintenance tasks.
- Restore the database.

Protecting Data

You should back up your data frequently so you can recover from system failures with minimal data loss. You can back up all data files associated with a database, and then restore the backup file if your database is damaged.

You can back up databases and personal files.

Database backups Include the database and all shared database supplemental files such as files associated with contact records, layouts, and templates. Database backups can occur while users are logged on. You do not need to lock the database.

Personal files backups Include personal supplemental files, such as a memos or e-mail messages not attached to contact records, stored in your personal folders. Any user can back up his or her own personal files.

For more information about database and personal supplemental files and backing and restoring personal files, see Chapter 35, "Managing Files and Data Storage."

Backing Up Databases

Administrator and Manager users can back up a database. Standard users can be granted permission to back up a remote database they belong to. For more information, see **"Adding or Removing Permissions," on page 175.**

To back up a database

1. From the **File** menu, point to **Back Up**, and then click **Database**.

   The Back Up Database dialog box appears.

2. In the **Back up files to** box, type a path and .zip file name for the backup file, or click **Browse** to select a location and type a file name.

   Note: To avoid overwriting a previous backup file, give the backup file a unique name or save it to a different folder. By default, the backup .zip file is placed in the C:\Documents and Settings\[User name]\My Documents\ACT\ACT for Windows 8\Backup folder.

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3. (Optional) To protect the backup file from unauthorized access, select **Password protect file**, and then click **OK**.

4. If you chose to protect the file, type and confirm a password, and then click **OK**.

ACT! automatically performs a system check each time you back up your database to ensure that all of the data you back up is usable. If problems exist with the data, you may need to check and repair your database. See **"Checking and Repairing Databases" on page 184**.

Locking Databases

When performing database maintenance functions, such as repairing, updating, restoring, or deleting a database, you must lock the database. Locking the database prevents other users from accessing data while you are performing maintenance.

Administrator and Manager users can lock a database. Standard users on a remote database can be granted permission to lock a remote database that they belong to. While the database is locked, only the user who locked it can access it.

Viewing and Notifying Logged-on Users

Before you lock a database, you can view which users are logged on and notify them that the database will be locked. You can also view a list of third-party applications accessing the database, such as an accounting program that interfaces with ACT!, so that you can close those applications before you lock the database.

When notified that the database is being locked, users have a specified period of time to save data and log out of the database. During that time, they can continue to work in the database. At the end of this delay period, however, the system automatically disconnects users logged on to the database.

Note: Once a lock is in place, users are automatically disconnected after the delay period. If a user is in the middle of a large mail merge or report, the operation will cease.

Users are notified that the database is being locked by a system-generated message. Only users who are logged on to the database receive the message. The system-generated message is sent to each user's last known network address. No users can log on to the database from the time of notification until the database is unlocked.

To lock a database

1. From the **Tools** menu, point to **Database Maintenance**, and then click **Lock/Unlock Database**.

   The Lock Database dialog box displays the logged-on users. If no users are logged on, the database locks immediately.

2. If users are logged on, complete the fields in the **Lock Database** dialog box as needed, and then click **OK**.

   All logged-on users receive a warning message. After the delay period, the system logs everyone out and locks the database.

Performing Database Maintenance

Regular maintenance keeps your database running efficiently and is strongly recommended.

Tip: Back up your database before you perform maintenance, so that you can retrieve any data you unintentionally purge.

Checking and Repairing Databases

Administrator users can use the Check and Repair feature to identify errors in a database and repair them. Manager and Standard users can be granted permission to check and repair a remote database they belong to. For more information, see "Adding or Removing Permissions," on page 175.

Checking and repairing a database can improve performance. For example, when you delete a record or information you no longer need, such as transaction logs or cleared activities, the disk space that holds the information becomes fragmented and cannot be used. When you check and repair your database, you remove the fragmented space so that the database processes information faster. You can also select the re-index option to rebuild the indexes. Database indexes reduce the amount of time for record searches.

To check and repair a database

1. Back up the database. See **"Backing Up Databases" on page 182.**
2. Lock the database. See **"Locking Databases" on page 183.**
3. From the **Tools** menu, point to **Database Maintenance**, and then click **Check and Repair**.
4. In the **Check and Repair Database** dialog box, select one or both options (**Integrity Check** and **Re-index**), and then click **OK**.

   The message "Working..." appears until the process is complete.

Note: This feature does not check and repair personal supplemental files or shared files located on your local drive.

Removing Old Data

Database maintenance includes removing data that you no longer need, such as notes, histories, attachments, cleared activities, and sales for outdated records. Reducing your database size by removing obsolete data significantly improves database speed and performance.

You define the type of data to remove and its age. Only Administrator users can remove old data.

> **Note:** If your MSDE database is close to the 2 GB limit, it is important for you to remove old data to reduce its size. To check the database size, from the Help menu, click About ACT!. Click the Database Information button, and then look in the Database Size box.

To remove old data

1. From the **Tools** menu, point to **Database Maintenance**, and then click **Remove Old Data**.
2. In the **Remove Old Data** dialog box, select the type and the minimum age of the data (in days) to remove, and then click **OK**

Scanning for Duplicate Records

In the database, you may find two or more records for the same person, group, or company. This is especially common in a multiple user environment where one user inadvertently adds a contact record that another user has already added. To correct this, you can scan a database for duplicate contacts and create a lookup of any duplicates that exist. Then, you can delete or combine the duplicate records as appropriate.

ACT! searches for duplicate records based on a default criteria; however, you can change the criteria.

Any user can scan for duplicate records, but only Administrator and Managers users can delete or combine records.

To scan for duplicate records

1. From the **Tools** menu, click **Scan for Duplicates**.
2 In the **Scan for Duplicate Contacts** dialog box, from the **Match on** list, select the first field to compare when searching for duplicate records.

3 (Optional) In the **Then on** fields, select the second and third fields to compare when searching for duplicates.

4 Click **OK**.

The Contact List displays the duplicate records found. Administrator and Managers users can then copy or move the data. See the next section, "Copying or Moving Contact Data."

If no duplicate records are found, a message appears stating that no records matched the criteria.

Copying or Moving Contact Data

If you have duplicate records or want to share information between records, you can copy or move the data between them. When you combine records, you have the option of deleting one of the records or keeping them both.

Some reasons to combine records are:

- To consolidate your database by eliminating duplicate records.
- To copy or move data from one record to another. For example, if two contacts work for the same company, and one contact leaves, you can move the data from one record to the other.
- To combine a personal and a business record. For example, if you keep separate records for a friend who is also your client, you can merge the records into one, combining the data.

To copy or move contact data

1. From the **Tools** menu, click **Copy/Move Contact Data**.

2 Follow the instructions on the pages, clicking **Next** to advance.

3 Click **Finish** when done.

After copying and moving data, Administrator and Manager users have the option to delete contact records that are not users of the database.

Restoring Databases

You can restore a database backup file if your existing database has been corrupted or your server has problems.

Note: You can restore a database backup file from ACT! 2005 and use it with ACT! 2006; however, restoring the previous version's backup file upgrades the database to ACT! 2006, so all users in the workgroup must upgrade to ACT! 2006 to continue sharing data. Data cannot be saved back to the ACT! 2005 version.

Administrator users can restore a local database. Manager and Standard users, if granted permission, can restore a remote database they belong to. For more information, see "Adding or Removing Permissions," on page 175.

Caution: Restoring an ACT! 2006 database backup file restores all system files to their original locations on the original computer and replaces a database of the same name, so be very careful when restoring backups.

The following steps describe how to restore an ACT! 2006 database backup file.

To restore a database

1. From the **File** menu, point to **Restore**, and then click **Database**.
2 In the **Restore Database** dialog box, select **Restore**, and then click **OK**.
3 In the **Restore database (.zip file)** field, type the path of the backup file, or click **Browse** to locate it. Click **OK**.
4 If the backup file is protected by a password, type it in the **Password** box, and then click **OK**.
5 Type your **User name** and **Password** to log on to the database to restore, and then click **OK**.

See the following topics in the online Help.

About database maintenance
About restoring databases and personal files
Copying databases
Deleting databases
Moving databases
Naming databases
Tips for maintaining databases

Chapter 35
Managing Files and Data Storage

Data storage refers to the storage of all data in ACT!. This includes the database itself and any *supplemental files* stored outside of the database, such as layouts, reports, templates, personal files, and attachments.

This chapter describes the types of supplemental files and explains how and where data is stored and accessed.

Supplemental Files

The two kinds of supplemental files are:

Database supplemental files These files are automatically created when you create a database and are associated only with contact records. Database supplemental files include layouts, templates, reports, and e-mail messages attached to contacts.

Personal supplemental files These files are automatically created during installation of ACT! and store data that is not associated with a contact, such as a memo or an e-mail message not attached to a contact record. They can also include copies of database supplemental files; for example, if you write a letter or create a report that you do not want to store in your database or share with other users, you can store it with your personal supplemental files.

An Administrator user can manage the database supplemental files and how users access them, which is especially important in multiple user environments. Users manage their personal supplemental files.

Both file types can be backed up and restored.

Database Supplemental Files

Database supplemental files are associated with the database and accessible to users of that database while it is open. By default, when a database is created, the database supplemental files are placed in a folder in your Databases folder. The folder is named \[databasename]-database files (for example, Act8Demo-database files).

That folder has subfolders representing each type of supplemental file: Attachments, Layouts, Queries, Reports, and Templates. The location of those files cannot be changed.

Note: If you have a workgroup environment with more than one server, you must keep the database and supplemental files on the same server.

When you copy a database, the database supplemental files are also copied. When you delete a database, all database supplemental files are also deleted.

Database supplemental files include:

- Attachments such as files attached to a contact's history, note, and Documents tab, and e-mail messages attached to contacts, groups, and companies (but not e-mail messages stored in the e-mail system).
- Contact, group, and company layouts.
- Saved queries.
- Report templates including envelopes and labels.
- Templates for word processing such as letters, fax cover pages, memos, e-mail messages, and quotes.

Database supplemental files:

- Are specific to a database and accessible by users of that database while it is open.
- Are the default files. For example, when a user creates a letter, ACT! displays the default template from the database supplemental files.
- Can be copied or saved as personal files.
- Can be created, edited, or deleted if users have the security role to do so. For more information, see "Users' Security Roles" on page 169.
- Can be included in synchronization. For more information, see Chapter 28, "Synchronizing for Administrators."
- Can be included in a database backup and can be restored. For more information, see Chapter 34, "Maintaining Databases."

Database Supplemental File Attachments

The following is true for all database supplemental file attachments, which include attachments to notes, history, or activities; e-mail messages attached to a contact, company, or group; and files on the Documents tab.

- Files and e-mail messages attached to contacts, groups, or companies in the database are accessible from within ACT!.
- If you clear an activity that has an attached file, the file remains in the contact's history record.
- Attachments with the same name are allowed. ACT! stores attachments with an internal file name, or *physical* name, while maintaining the display name, or *logical* name, the user has given it.
- Personal e-mail messages that users attach to a contact record's history are added to the database supplemental files.
- Only attachments relating to records included in the Sync Set will synchronize if the option is set to allow attachment synchronization when the remote database is created.

Personal Supplemental Files

A default set of personal supplemental files is created when you install ACT!. These files are stored outside the database and can be accessed regardless of the database the user can access. During installation, personal supplemental files are stored in two locations by default:

- \Documents and Settings\[username]\My Documents\ACT\ACT for Windows 8
- \Documents and Settings\[username]\Application Data\ACT\ACT for Windows 8

Note: Application Data is a hidden folder. To view it, set your Folder Options to show hidden files and folders.

The location of personal supplemental files can be changed on the General tab of the Preferences dialog box (accessed from the Tools menu). The General tab opens by default.

Personal supplemental files include:

- Documents and templates for report and word processing.
- Internet Mail e-mail messages.
- Other files such as dictionaries for the spelling checker.

Personal supplemental files:

- Are stored on a user's local directory by default and are available to a user at any time, unless he or she is explicitly restricted from accessing them.
- Are stored in a default location on a user's computer. The location can be changed. You can move existing files to another location on a user's computer.
- Can be copied or saved to the database supplemental files folder.
- Can be copied to another database.
- Can be backed up, independent of the database backup, and can be restored.

Unlike database supplemental files, personal supplemental files remain on your computer or server if you delete or uninstall the database. If you reinstall ACT!, no personal supplemental files are overwritten.

Supplemental Files Storage

The following table lists the types of files included with ACT! and where they are stored by default.

File Type	Database Supplemental Files	Personal Supplemental Files
Attachments to notes, history, activities, and the Documents tab	X	
E-mail messages attached to contacts, groups, or companies	X	
Internet links		X
Label and envelope templates	X	
Layouts	X	
Queries	X	
Report templates	X	
Saved e-mail messages, not attached to contacts, groups, or companies		X
Spelling checker dictionaries		X
Word-processing documents		X
Word-processing templates	X	

See the following topics in the online Help.

About creating databases and managing files
About restoring databases and personal files
Backing up personal files
Learning more about supplemental files
Restoring personal files
Changing the location of personal supplemental files

Customizing ACT!

Chapter 36
Customizing Fields

Using the Define Fields feature, you can customize the ACT! database by creating, modifying, or deleting fields for contacts, groups, companies, and opportunities.

Note: Users on remote databases cannot access the Define Fields feature.

Fields in the ACT! database are one portion of a record and represent individual data items such as a contact name or telephone number. When you create or modify contact, group, and company fields and use them on layouts, you specify how data is presented on the Contact Detail, Group Detail, and Company Detail views. For more information about layouts, see Chapter 37, "Customizing Layouts."

Note: Opportunity Field 1 through Opportunity Field 8 can only be modified for field name and length. When you modify the field name, the changed field name appears on the Opportunity view.

Customized fields also display in list views, in the Customize Columns lists, and in reports field lists.

Administrator and Manager users can access the Define Fields feature. The database must be locked to use Define Fields. If multiple users are accessing the database, they will be notified that the database is being locked. For more information, see "Locking Databases" on page 183.

You can add, edit, or delete fields and field attributes.

In this chapter, you will learn about planning for field customizations, the types of fields and field attributes, and how to create and edit fields and use drop-down lists with fields.

Planning for Field Customizations

When you work with fields, pay attention to attributes such as the field settings and data types. Virtually all information in ACT! is associated with a field, so when you change or delete fields or field attributes, the effects are significant. Before you customize a field, consider the following:

- How will the field be used? Will it be free-form text for viewing purposes only, or will it be used for tracking and reporting purposes?
- When entering data in the field, should the user be restricted to selecting items from a list?
- Will the data entered in the field affect other areas of the program, such as reporting, mapping imported data, synchronization, or data security?
- If a field is changed or deleted, what information may be lost?

Types of Fields

The three types of fields are: System - not editable, System - editable, and User-defined fields.

System - not editable fields Are installed with the database and maintained by ACT!. Examples are the Last Meeting or Edit Date fields. You cannot use Define Fields to modify System - not editable fields, but you can modify them in a layout.

System - editable fields You cannot delete System - editable fields, such as Contact, Phone, and Address fields 1-3, and you can only modify them minimally. For example, you cannot delete the Contact field, but you can prevent it from accepting a blank value. Although you cannot delete a System - editable field, you can remove it from a layout.

User-defined fields Are fields you create and define. ACT! provides ten default user-defined fields on the User Fields tab in the Contact record to customize. You can create other user-defined fields as well.

Field Attributes

Field attributes determine the type of data the field can hold, such as whether it accepts text or numbers; how it behaves, such as the number of characters allowed; whether it can be duplicated or deleted; and the rules for entering data in the field.

Data Types

The *data type* determines the kind of data you can enter in the field. For example, if you want to add a field for the number of referrals you receive from contacts, you can specify a “Number”data type so the field only accepts numbers. You can also create a field with an “Annual event” data type to help remember events that occur annually, such as when a policy renews.

E-mail, phone, and address data types contain subfields that are automatically added when you create a field with this data type. You can edit the subfields individually.

You can change some data types without consequence, such as changing “Character” type fields to “Initial-Caps,” but you should be careful when changing the data type since it may cause data loss. For example, if you change a “Character” type field containing dates, such as January 1, 2000, to a “Date” type field that accepts only MM/DD/YYYY formatting, the information cannot be converted and data is lost.

Field Behavior Settings

Field behavior settings specify how a field behaves, such as whether it accepts text or numbers, the number of characters allowed, whether it can be duplicated or deleted, and the rules for entering data in the field. Field settings help you control the input and output of information in your database.

Caution: You can change field settings, but make sure that changing the field will not cause data loss. For example, changing a format to hold fewer characters may cause current data to be truncated.

Some of the field settings you can select or specify are:

Generate history When selected, this option creates a history item when changes are made to a field. This option tracks by user, date, and time of the change and adds the item to the History tab.

Primary Primary fields are used to copy data from one record to another, such as when you duplicate a contact record. By default, System - editable fields are primary fields. For example, the Company and Phone fields are both System - editable fields and primary fields. You can also set User-defined fields as primary fields. You can remove the primary field setting from User-defined fields and from some System - editable fields.

Drop-down lists Drop-down lists display field values that all records of the same type in the database can use. For example, you can access the Contact ID/Status drop-down list from all contact records. You can also specify if users can modify the values in a drop-down list, type a value directly into the field, or select multiple items in the list.

Default values You can specify default values, usually by specifying the most common entry. For example, if most of your contacts are from Arizona, you can set a default value of “AZ” in the state field. That way, users only need to change the value for the few contacts who are not from Arizona.

Field format Field format enforces a general structure or appearance of a value in a field, so a user must enter values in a specific way. You use placeholders to specify how the data will be formatted, such as "#" as numeric, "@" as alphabetic, and "%" as alphanumeric. You can specify the field format for fields with these data types: Character, Initial-Caps, Lowercase, Uppercase, and URL Address.

Field length You can specify the maximum number of characters the field can contain.

Triggers Triggers cause ACT! to carry out a procedure or action, such as launching an activity series, an executable file, or a Web site (URL) when a user enters, exits, or changes the value in a field.

Creating Fields

You can create fields, using Define Fields or the Layout Designer, and then add these fields to layouts using the Layout Designer. For more information, see Chapter 37, "Customizing Layouts." When you create a field, you specify the field's attributes such as the data type and other field behavior settings.

To create a field

1. From the **Tools** menu, click **Define Fields**.

   The Define Fields - Create, edit, or delete fields page appears.
2. In the **View fields for** list, select the type of record (Companies, Contacts, or Groups) to create a field for.
3. In the **Field Tasks** box, click **Create new field**.
4. Follow the instructions on the pages, clicking **Next** to advance.
5. Click **Finish** when done.

Editing Fields

You can edit a field, such as changing the data type or field attributes, and the changes take effect immediately. However, when you edit a contact, company, or group field name, the field label does not change unless you change it on the layout. Changes to opportunity field names automatically display in the Opportunity view, Opportunity List, customize columns lists, and reports field list.

Tip: To avoid data loss when editing a field, create a new field and then use the Copy Field and Swap Field commands from the Edit menu instead of changing the data type.

Scenario

Chris keeps information about conversations with contacts in the Last Results field on the Contact window, however, the field is too small. He will increase the size of the field so it can hold more characters. He does this by editing the Last Results field through Define Fields. On the Customize Behavior page, he changes the value of the Field Length.

To edit a field

1. From the **Tools** menu, click **Define Fields**.

   The Define Fields - Create, edit, or delete fields page appears.
2. In the **View fields for** list, select the record type.

3. In the **Field Name** list, select the field, and then in the **Field Tasks** box, click **Edit field**.
4. Follow the instructions on the pages, clicking **Next** to advance.
5. Click **Finish** when you are done.

Using Drop-Down Lists with Fields

You can use a drop-down list with a field. If you want to use a new drop-down list with a field, you have to create the drop-down list first. You can enter the items in the list or you can import drop-down list items in a *delimited text file* format, which is a text (.txt) file with a character, such as a comma, separating the items in the list. The following steps describe how to create a drop-down list, import the values, and then assign the list to a field.

To create a drop-down list and use it with a field

1. From the **Tools** menu, click **Define Fields**.

   The Define Fields - Create, edit, or delete fields page appears.
2. In the **List Tasks** box, click **Manage drop-down lists**.
3. In the **Drop-down list tasks** box, click **Create drop-down** list.
4. Type the name of the list and complete the other options, and then click **Next**.
5. In the **List Tasks** box, click **Import drop-down list items**.

   The Import List Items dialog box appears.

   a. Click **Browse**, locate the file to import items from, and then click **Open**.

   b. To include descriptions with the file, select **Include descriptions**.

   c. The **Append imported items** option is selected by default. To replace the current list of values with the values in the list you are importing, clear the check box.

   d. Click **Import**.
6. Click **Finish**, and then click **Home**.

   The Define Fields - Create, edit, or delete fields page appears.
7. To assign the drop-down list to a field, select the record type, and then select the field.

8. In the **Field Tasks** box, click **Edit field**.
9. In the **Customize field behavior** box, in the **Use drop-down list** field, select the new drop-down list you created, and then click **Next** to customize the list behavior and set other options.

See the following topics in the online Help.

About fields and field attributes
About importing and exporting list values
Creating annual event fields
Creating and editing address, e-mail, or phone fields
Creating delimited text files
Data types
Deleting fields
Managing drop-down lists
Setting field triggers to launch activity series, applications, or URLs

Chapter 37
Customizing Layouts

Using the Layout Designer, you can customize ACT! by modifying layouts for contacts, groups, and companies. *Layouts* are the arrangement of the fields, tabs, background, and order of data entry for the Contact Detail, Group Detail, and Company Detail views. You select layouts from the Layout list on the navigation bar. You can use the Define Fields feature to create or modify fields, and then use the Layout Designer to specify how data is presented on the Contact Detail, Group Detail, and Company Detail views. For more information about using Define Fields, see Chapter 36, "Customizing Fields."

Administrator and Manager users can modify existing layouts or create layouts that contain only those fields needed and in the order needed.

Layouts are categorized in ACT! as database supplemental files. They can be backed up and restored with the database. For more information, see "Database Supplemental Files" on page 189. Layouts can also be synchronized with remote databases. For more information, see "Planning for Synchronization" on page 143.

In this chapter, you will learn about:

- Opening and viewing the Layout Designer.
- Modifying and creating layouts.
- Adding fields and objects to layouts.
- Adding and hiding tabs.
- Showing and changing the order of Tab or Enter Stops.
- Saving layouts.

Tip: To see a feature tour explaining the Layout Designer, from the Help menu, point to Feature Tours, and then click Customization.

You create and edit layouts in the Layout Designer.

Opening and Viewing the Layout Designer

In the Layout Designer, you can use the Toolbox, toolbar, menus, dialog boxes, and Properties window to add, change, or delete fields, objects, and tabs on layouts. You can also use grid displays to make it easier to align fields and objects on layouts.

To open the Layout Designer

- From the **Tools** menu, click **Design Layouts**, and then click the layout type (Contact, Group, or Company).

The Toolbox displays on the left side of the layout. You can click Drawing or Field buttons to display their tools, and then click the tool to add the object or field to the layout. The Properties window displays the selected object's or field's properties, such as border color and alignment. You change the property of the object or field by clicking it and then selecting the value for the property. You can resize the Properties window and the Toolbox, and you can move them to another location in the Layout Designer.

You can show the grid, which displays as horizontal and vertical lines across the template, and turn on Snap to Grid, which aligns fields and objects to a position on the grid.

To open or close the Toolbox or Properties window

- From the **View** menu, click **Toolbox** or **Properties Window**.

To show the grid

- From the **Format** menu, point to **Grid**, and then click **Show Grid**.

When the grid is shown, a check mark displays next to it on the menu.

To turn on Snap to Grid

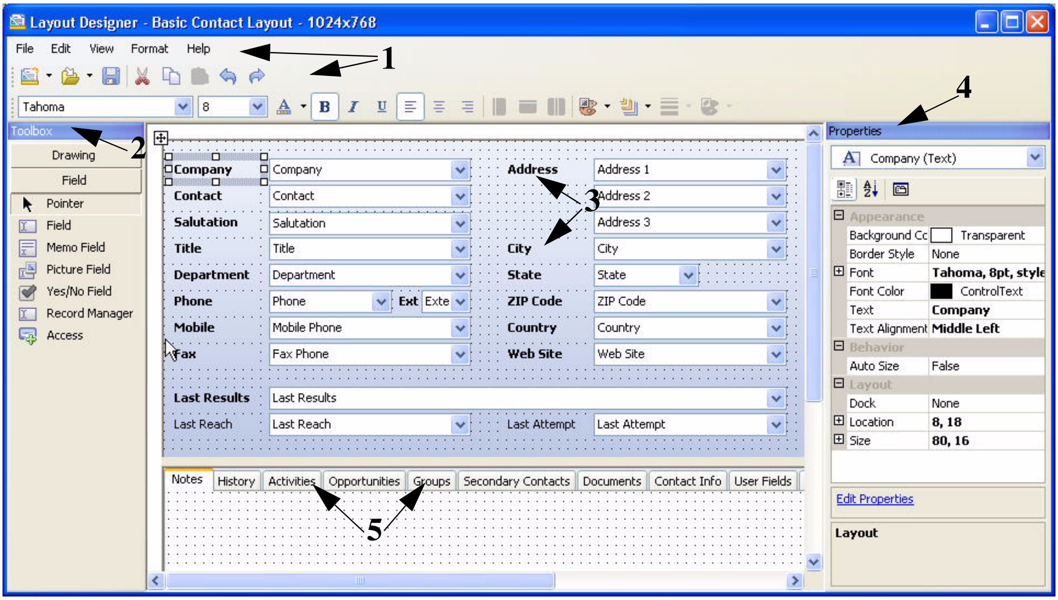
- From the **Format** menu, point to **Grid**, and then click **Snap to Grid**.

When Snap to Grid is on, a check mark displays next to it on the menu.

See the following topics in the online Help.

Moving or resizing the Properties window in report templates or layouts
Showing and hiding the Toolbox in report templates or layouts
Showing and hiding grid lines in report templates or layouts
Using the Properties window in report templates or layouts

What’s in the Layout Designer?



Feature	Function
1 Menu bar/Toolbar	Includes tools to access features in the Layout Designer.
2 Toolbox	Used to change the appearance of your layout.
3 Fields	Are placeholders for information pulled from contact, group, or company records. You can add, modify, or delete a field from a layout. You can also move fields within the layout or to other tabs.
4 Properties window	Used to modify properties of a field or object.
5 Tabs	You can add, edit, or delete non-system tabs. You can hide or change the order of all tabs.
6 Tab and Enter Stops	Specifies the order the pointer follows when you press the TAB or ENTER keys. Display Tab and Enter Stops from the View menu. For more information, see "Showing and Changing the Order of Tab or Enter Stops," on page 209.

Modifying and Creating Layouts

You can use the Layout Designer to modify an existing layout or create a new layout.

Tip: It is generally easier to modify an existing layout than to create a new one.

To modify a layout

1. From the **Tools** menu, point to **Design Layouts**, and then click the type of layout (Contact, Group, or Company).

   The layout appears in the Layout Designer.

2. Add fields and objects, add and modify tabs, and change the appearance of the layout. See "Adding Fields and Objects to Layouts" on page 207.
3. Save the layout. See "Saving Layouts" on page 211.

To create a layout

1. From the Tools menu, point to Design Layouts, and then click the type of layout (Contact, Group, or Company).

   The layout appears in the Layout Designer.

2. From the File menu, point to New, and then click the type of layout to create.
3. Add fields and objects, add and modify tabs, and change the appearance of the layout. See "Adding Fields and Objects to Layouts" on page 207.
4. Save the layout. See "Saving Layouts" on page 211.

See the following topics in the online Help.

About layouts and the Layout Designer
losing the Layout Designer

Adding Fields and Objects to Layouts

You can add fields and objects to a layout so that it contains all the fields you need for contacts, groups, and companies. The fields available for placement on the layout depend on the control you select in the Toolbox and the fields that correspond to the selected tool. For example, if you want to add a Memo field to the layout, the available fields you can select from are those specified in Define Fields as the data type of Memo. Once a field is added to a layout, it is no longer available in the list of fields for that selected tool, but you can create new fields.

The following table shows how you add fields and objects to a layout.

Use this	
Field	A field.
Memo Field	A field that can contain alphanumeric characters.
Picture Field	A field that can contain a picture.
Yes/No Field	A field that is formatted as a check box.
Record Manager	A field that displays the Record Manager (owner of the record).
Access	A field that contains a group box for specifying user access to the record (Public or Private).
Text	An object containing text, including text in field labels.
Image	A static image, such as your company logo.
Rectangle	A rectangle-shaped object.
Ellipse	An oval-shaped object.

The following procedures are completed in the Layout Designer.

To add a field and field label

1. In the **Toolbox**, in the **Field** tools list, click **Field**.
2. Position the cross-hair pointer on the layout at the insertion point, and then drag to define the field's size.

   When you release the mouse button, the Select Field dialog box appears.
3. Select a field from the list.
4. The **Include a label** check box is selected by default. If you do not want to use a field label, clear the check box.
5. Click **Add**.

   The field displays on the layout.

To add text

1. In the **Toolbox**, click **Drawing**, and then click the **Text** tool.
2. Position the cross-hair pointer on the layout at the insertion point, and then drag to define the size of the text box.
3. In the **Properties** window, in the **Text** field, type the text.

   If the text does not fit in the text box, it wraps to the next line. You can select the text box and drag a border to resize it.
4. Use the tools and lists on the toolbar to format the text.

To add an image

1. In the **Toolbox**, click **Drawing**, and then click the **Image** tool.
2. Position the cross-hair pointer on the layout at the insertion point, and then drag to define the size.
3. From the **Open** dialog box, locate the image, and then click **Open**.

Adding and Hiding Tabs in Layouts

The default contact, group, and company layouts have tabs, such as Notes and Opportunities. Layouts can contain a combination of system and non-system tabs. System tabs are: Notes, History, Activities, Opportunities, Secondary Contacts, and Documents. You cannot edit a system tab, but you can hide it. Default non-system tabs are: Contact Info, User Fields, Home Address, Addresses, Company Info, and Group Info.You can add, edit, and delete non-system tabs. You can change the order of system and non-system tabs.

To add a tab

1. From the **Edit** menu, click **Tabs**.
2. In the **Edit Tabs** dialog box, click **Add Tab**.
3. In the **Add Tab** dialog box, type the name of the tab, and then click **OK**.

Tip: To change the tab order, select a tab, and then click Move Up or Move Down.

You can add fields, text, and objects as described in the previous sections.

To hide a tab

1. From the **Edit** menu, click **Tabs**.
2. In the **Edit Tabs** dialog box, select the tab to hide, and then click the left arrow.

   The tab is listed in the Hidden Tabs list and is hidden on the layout.

Showing and Changing the Order of Tab or Enter Stops

Tab and Enter Stops allow the user to enter information in fields and move through the layout quickly. A *Tab Stop* allows the user to press the TAB key to move to the next field in the Tab order. An *Enter Stop* allows the user to press the ENTER key to move to the next field in the Enter order. When you show Tab Stops, they display as red numbers beside the fields. When you show Enter Stops, they display as green numbers beside the fields.

To show Tab or Enter Stops

- To show Tab Stops, from the **View** menu, point to **Tab Stops**, and then click **Show Tab Stops**.
- To show Enter Stops, from the **View** menu, point to **Enter Stops**, and then click **Show Enter Stops**.

To turn off the Tab or Enter stops, click Show Tab Stops or Show Enter Stops again. When the command is on, a check mark displays next to it.

You can switch the order or specify a sequence for Tab or Enter Stops. Tab Stops and Enter Stops are numbered with the next consecutive free number. When you click a field that does not have a Stop assigned to it, ACT! assigns the next sequential number available on the layout. For example, if you set Stops 0 through 10 and 15 through 30, the next time you click a field that does not have a Stop assigned to it, the number assigned to the Stop is "11." The lowest value available for a Tab or Enter Stop is 0.

Caution: You can create duplicate Tab and Enter Stops. If duplicate Stops exist, the order will cycle through the duplicates before advancing to the next highest number.

When you click a field that has a Stop assigned to it, the Stop is removed and becomes available for placement.

Note: You can set Tab and Enter Stops for all fields, including fields that appear on a tab (system tab or non-system tab).

To switch the order of two Tab or Enter Stops

1. To set the order of Tab Stops, from the **View** menu, point to **Tab Stops**, and then click **Show Tab Stops**.

   - or -

   To change the order of Enter Stops, from the **View** menu, point to **Enter Stops**, and then click **Show Enter Stops**.
2. To switch the current value of one field with the value of another field, click the number of the first field to change.
3. Click the field that you want to switch with the first field, and then click it again (do not double-click) to assign the first field's value to the second field.
4. Click the first field to complete the switch.

   For example, to switch field orders 6 and 8, first click number 6 to clear it. Then, click number 8 two times, without double-clicking, to clear number 8 and assign number 6. Finally, click the empty field (where Tab number 6 was) to assign number 8.

To set a specific number for a Tab Stop or Enter Stop in a layout

1. To set the order of Tab Stops, from the **View** menu, point to **Tab Stops**, and then click **Show Tab Stops**.

   - or -

   To change the order of Enter Stops, from the **View** menu, point to **Enter Stops**, and then click **Show Enter Stops**.
2. Right-click the field to change.
3. In the **Set Index** dialog box, type the number for the stop (that is, the order in which it should be accessed), and then click **OK**.

Saving Layouts

When you have finished creating or modifying a layout, you can save it. Once a layout is saved, all users can access it.

To save a layout

- On the toolbar, click the **Save** tool or to save the layout with a new name, from the **File** menu, click **Save As** and type a name.

Contact layouts are saved with a .cly extension; company layouts are saved with an .aly extension; group layouts are saved with a .gly extension.

See the following topic in the online Help.

Adding or removing tabs using the Properties window
Adding or removing background colors and images in layouts
Customizing field entry order in layouts
Locking controls in layouts
Moving objects and fields in layouts
Removing layouts
Removing tabs from layouts
Working with objects on layouts

Appendixes and Index

Appendix A
Commands in ACT!

This appendix lists the commands available from the ACT! menus and shows which menu each command is listed under. When necessary to avoid confusion, explanatory text is provided in parentheses. For example, report commands have "Report" in parentheses.

Note: The commands listed are based on a U.S. installation of ACT!. Some commands, such as Internet links, may be different for other locales. Also, some commands are restricted to certain user roles.

This Appendix excludes menu commands for the ACT! Word Processor, ACT! e-mail client, Report Designer, and Layout Designer.

Command	Menu	Submenu(s)
About ACT!	Help	
Accept Incoming Sync	Tools	Synchronize
ACT! Add-Ons	View	Internet Services
ACT! Consulting	Help	Service and Support
ACT! Consulting	View	Internet Services
ACT! Quick Reference Card	Help	Online Manuals
ACT! Service and Support	View	Internet Services
ACT! Training	View	Internet Services
ACT! Update	Help	
ACT! User Community	View	Internet Services
ACT! User’s Guide	Help	Online Manuals
ACT! Welcome	View	Internet Services
Activities (Report)	Reports	
Activities Tab	View	
Activity Series	Schedule	
Activity Series Template	Schedule	Manage
Activity Types	Schedule	Manage

Command	Menu	Submenu(s)
Add/Remove Contacts (Company)	Groups	Companies: Company Membership
Add/Remove Contacts (Group)	Groups	Group Membership
Add Selected to Company	Groups	Companies: Company Membership
Add Selected to Group	Groups	Group Membership
Adjusted for Probability (Report)	Reports	Opportunity Reports
Advanced Query	Lookup	Advanced
All Companies	Lookup	Companies
All Contacts	Lookup	
All Groups	Lookup	Groups
All Opportunities	Lookup	Opportunities
Annual Events	Lookup	
Attach File (Company)	Groups	Companies
Attach File (Contact)	Contacts	
Attach File (Group)	Groups	
Back (Window)	View	
Back Up (Database)	File	Back Up
Back Up (Personal Files)	File	Back Up
By Example	Lookup	
Call	Schedule	
Check and Repair (Database)	Tools	Database Maintenance
City	Lookup	
City (Company)	Lookup	Companies
Clear Activity	Schedule	
Close (Database)	File	
Columns	Tools	Customize
Companies	View	
Company	Lookup	
Company Comprehensive (Report)	Reports	Company Reports

Command	Menu	Submenu(s)
Company (Design Layout)	Tools	Design Layouts
Company Directory (Report)	Reports	Company Reports
Company List	View	
Company List (Report)	Reports	Company Reports
Company Membership (Report)	Reports	Company Reports
Company Summary (Report)	Reports	Company Reports
Contact	Lookup	
Contact Activity	Lookup	
Contact (Design Layout)	Tools	Design Layouts
Contact Directory (Report)	Reports	
Contact Information (Contacting ACT!)	Help	Service and Support
Contact List	View	
Contact Report	Reports	
Contact Status (Report)	Reports	
Contacts	View	
Convert ACT! 3.0 - 6.0 Items	Tools	
Convert to Company	Groups	
Copy	Edit	
Copy Field	Edit	
Copy/Move Contact Data	Tools	
Create Company from Contact	Groups	Companies
Create Contact from Company	Groups	Companies
Create Lookup (Company)	Groups	Companies
Create Lookup (Group)	Groups	
Create Quote	Contacts	Opportunities
Customization (Tour)	Help	Feature Tours
Customize Columns	View	
Cut	Edit	
Daily (Calendar)	View	Calendar
Database	File	Back Up

Command	Menu	Submenu(s)
Database	File	Restore
Define Fields	Tools	
Delete (Company)	Groups	Companies
Delete Contact	Contacts	
Delete Database	Tools	Database Maintenance
Delete (Group)	Groups	
Delete Opportunity	Contacts	Opportunities
Display Map	Contacts	
Duplicate (Company)	Groups	Companies
Duplicate Contact	Contacts	
Duplicate (Group)	Groups	
Edit Opportunity	Contacts	Opportunities
Edit Template	Write	
Edit Template (Report)	Reports	
E-mail	View	
E-mail Address	Lookup	
E-mail Message	Write	
Events	Schedule	Manage
Exit	File	
Export (Information to File)	File	
Export to Excel	Tools	
Fax Cover Page	Write	
Filter (Active Window, View, List, or Tab)	View	
First Name	Lookup	
Forward (Window)	View	
Getting Started Wizard	Help	
Grant Calendar Access	Schedule	
Group Comprehensive (Report)	Reports	Group Reports
Group (Design Layout)	Tools	Design Layouts
Group List	View	

Command	Menu	Submenu(s)
Group List (Report)	Reports	Group Reports
Group Membership (Report)	Reports	Group Reports
Group Summary (Report)	Reports	Group Reports
Groups	View	
Groups and Companies (Tour)	Help	Feature Tours
Groups/Companies Tab	View	
Handheld Link Installation (Tour)	Help	Feature Tours
Handheld Setup	Tools	
Help Topics	Help	
History Summary Classic (Report)	Reports	
History Summary (Report)	Reports	
History Tab	View	
History Time Spent (Report)	Reports	
How To Use Help	Help	
ID/Status	Lookup	
ID/Status (Companies)	Lookup	Companies
Import (Information from file)	File	
Insert Company Note	Groups	Companies
Insert Group Note	Groups	
Insert Note	Contacts	
Keyword Search	Lookup	
Knowledge Base Articles	Help	Service and Support
Last Name	Lookup	
Last Synchronized	Lookup	Advanced
Letter	Write	
Link to Company	Groups	Companies
Lock/Unlock Database	Tools	Database Maintenance
Mail Merge	Write	
Main Phone	Lookup	Companies

Command	Menu	Submenu(s)
Manage Links	View	Internet Services: ACT! Links
Manage Process List	Contacts	Opportunities
Manage Product List	Contacts	Opportunities
Manage Teams	Tools	
Manage Users	Tools	
MapQuest Driving Directions	View	Internet Services: Internet Links
MapQuest Maps	View	Internet Services: Internet Links
Meeting	Schedule	
Memo	Write	
Menus and Toolbars	Tools	Customize
Mini-calendar	View	
Monthly (Calendar)	View	Calendar
Move Company	Groups	Companies
Move Group	Groups	
My Record	Lookup	
Name (Company)	Lookup	Companies
Name (Group)	Lookup	Groups
Name (Opportunity)	Lookup	Opportunities
Navbar	Tools	Customize
New Company	Groups	Companies
New Contact	Contacts	
New Database	File	
New Division	Groups	Companies
New Document	Write	
New Group	Groups	
New Letter/E-mail Template	Write	
New Opportunity	Contacts	Opportunities
New Secondary Contact	Contacts	
New Subgroup	Groups	

Command	Menu	Submenu(s)
New Template (Report)	Reports	
Notes/History (Report)	Reports	
Notes Tab	View	
Open Database	File	
Opportunities by Contact (Report)	Reports	Opportunity Reports
Opportunities by Record Manager (Report)	Reports	Opportunity Reports
Opportunity Graph	Contacts	Opportunities
Opportunity Graph (Report)	Reports	Opportunity Reports
Opportunity List	View	
Opportunity Pipeline	Contacts	Opportunities
Opportunity Pipeline (Report)	Reports	Opportunity Reports
Opportunity Tab	View	
Opportunity Tracking (Tour)	Help	Feature Tours
Other Company Reports	Reports	Company Reports
Other Contact Reports	Reports	
Other Document (From Template)	Write	
Other Fields	Lookup	
Other Fields (Company)	Lookup	Companies
Other Fields (Group)	Lookup	Groups
Other Fields (Opportunity)	Lookup	Opportunities
Other Group Reports	Reports	Group Reports
Other Opportunity Reports	Reports	Opportunity Reports
Paste	Edit	
Personal Activity	Schedule	Other
Personal Files	File	Back Up
Personal Files	File	Restore
Phone	Lookup	
Phone Contact	Contacts	
Phone List (Report)	Reports	

Command	Menu	Submenu(s)
Pipeline Report	Reports	Opportunity Reports
Preferences	Tools	
Previous (Lookup)	Lookup	
Print	File	
Priorities	Schedule	Manage
Product	Lookup	Opportunities
Quick Print Current Window	File	
Record Company History	Groups	Companies
Record Group History	Groups	
Record History	Contacts	
Record Manager	Lookup	Opportunities
Refresh (window or view)	View	
Register ACT!	Help	
Remove Activities	Tools	Outlook Activities
Remove Old Data	Tools	Database Maintenance
Replace Field	Edit	
Reschedule Activity	Schedule	
Reset Menus and Toolbars	Tools	Customize
Resources	Schedule	Manage
Restore (Database)	File	Restore
Restore (Personal Files)	File	Restore
Sage Software Corporation Web Site	View	Internet Services
Sales Analysis by Record Manager (Report)	Reports	Opportunity Reports
Save (Database)	File	
Save (Database) Copy As	File	
Save Lookup as Company	Lookup	Companies
Save Lookup as Group	Lookup	Groups
Scan for Duplicates	Tools	
Send Activity E-mail	Schedule	

Command	Menu	Submenu(s)
Set Password	File	
Share Database	Tools	Database Maintenance
Show Large Buttons	Tools	Customize
Show Small Buttons	Tools	Customize
Sort	Edit	
Source of Referrals (Report)	Reports	
Spelling	Tools	
Stage	Lookup	Opportunities
State	Lookup	
State (Company)	Lookup	Companies
Status	Lookup	Opportunities
Swap Field	Edit	
Synchronization Panel	Tools	
Synchronize Now	Tools	Synchronize
Sync Set	Lookup	Advanced
Task List	View	
Timer	Tools	
Today	View	Calendar
To-Do	Schedule	
Total	Lookup	Opportunities
Totals By Status (Report)	Reports	Opportunity Reports
Undo	Edit	
Undo Changes to Contact	Edit	
Unlink from Company	Groups	Companies
Update Activities	Tools	Outlook Activities
Update Salutation Field	Tools	
Users	Lookup	Advanced
Vacation	Schedule	Other
Weekly (Calendar)	View	Calendar
Work Week (Calendar)	View	Calendar

Command	Menu	Submenu(s)
Yahoo! Company News	View	Internet Services: Internet Links
Yahoo! Local Info	View	Internet Services: Internet Links
Yahoo! Person Search	View	Internet Services: Internet Links
Yahoo! Search	View	Internet Services: Internet Links
Yahoo! Stock Quote	View	Internet Services: Internet Links
Yahoo! Ticker Symbol Lookup	View	Internet Services: Internet Links
Yahoo! Weather	View	Internet Services: Internet Links
Zip Code	Lookup	
ZIP Code (Company)	Lookup	Companies

Appendix B
Glossary

activity The general term for meetings, to-do's, telephone calls, and so on.

activity series A series of linked activities that you can schedule with one or more contacts. The anchor date specifies when the series begins.

Administrator user A security role assigned to a user who can perform all functions, including adding users to the database, performing database maintenance, and modifying fields and layouts.

anchor date The date an activity series begins. Activities may be scheduled to occur before or after the anchor date.

backup file A copy of data made to archive or safeguard files to prevent loss in case the original is damaged or destroyed.

banner A horizontal bar that displays on a calendar to indicate a timeless activity or an activity that spans one or more days.

Browse user A security role assigned to a user who can only view or print information, run Advanced queries, and access specific areas of the application.

check and repair Database maintenance feature that removes fragmented space so that the database processes information faster and rebuilds the indexes.

comma-separated value A file format (.csv) that uses commas to separate items in a list.

company A special record type that allows easy tracking of contacts who work for a company.

compress A way to reduce the size of data so that it can be stored in less space on a computer.

conflict resolution The process of determining which changes to data to keep when more than one user changes the same field in a record.

contact The term used for a customer, business associate, friend, or anyone that you need to keep track of in ACT!.

conversion To change data from one version to another, for example from ACT! v6 to ACT! 2006/8.0.

data storage A general term for the storage of all data in ACT!. Data storage includes the database files and supplemental files, such as layouts and templates.

data type Determines the kind of data you can enter in a field, such as numeric.

delimited text file A file format (.txt) that uses tab characters, commas, or spaces to separate items in a list.

division A subset of a company. A company may include all contacts who work at the same business; they may be further divided into divisions by departments.

dynamic Items that are dynamic can change; they are not fixed. For example, contact records that are added by query criteria as members of a group may change if the record no longer meets the criteria.

expiration period The time frame during which a remote database must synchronize with a main database.

export The process of copying data from an ACT! database to another database or other program.

field Part of a record in a database containing one piece of information. For example, the contact name is a field in ACT!. The Define Fields feature allows users to create, modify, and delete some ACT! field types. See *System - editable field*, *System - not editable field*, and *User-defined field*.

field indexes Lists of data in fields. ACT! uses indexes to quickly find or sort records.

field settings Used to specify how a field is used and how it behaves.

field trigger Launches an application, activity series, or URL when a user enters, leaves, or changes a specific field.

filters A way to limit the type of information that displays in a view or on a report.

firewall A security system used to protect an organization's network against external threats.

group A collection of contacts with something in common, such as working on the same project.

history A record that something has occurred related to a contact. For example, you might record history when you meet with a contact. Users can share history items with other contacts, associate them with groups and/or companies, and include attachments in history items.

HTML Acronym for Hypertext Markup Language. Using HTML, you can include graphics or special text formatting in e-mail messages and templates.

import The process of bringing data from an outside source into an ACT! database.

ISP Acronym for Internet Service Provider. A commercial, educational, or government institution providing individuals and companies access to the Internet.

keyword A word that you can search for using a query. Any word in an ACT! database is a keyword.

layout The arrangement of the fields, tabs, and background in the ACT! window.

lookups A selection of contacts, groups, companies, or opportunities based on specified criteria.

main database The primary database containing all records. For synchronization, the user enables the main database, defines a Sync Set, then creates one or more remote databases that will synchronize with the main database.

Manager user A security role assigned to users who require system-wide access but do not need to use administrative tools. This role is typically assigned to people who have other users reporting to them and need to set up synchronization or customize ACT.

mapping To point the contents of one field value to another. For example, making a field in one program import or export data to a field in another program.

multiuser An environment where a database can be used by more than one person. In a workgroup environment, several people access the database simultaneously through communication facilities or network terminals.

My Record The contact record for a user of an ACT! database. It is used to personalize letter and report templates and to schedule personal activities.

network (inside a firewall) A synchronization method that allows synchronization on a network via a direct connection or dial-up networking.

note Information included with the contact record to help you manage the contact relationship.

opportunity A potential sale to a contact.

opportunity pipeline A graphical representation of opportunities at each stage in a sale's cycle.

permissions The ability to perform specific tasks in ACT!. Some permissions are assigned by default to a user role, but they can be removed. Permissions are assigned and removed from a user's profile by the Administrator user.

primary fields Designated fields in ACT! that are used when duplicating a contact or group record. Default primary fields exist, but some fields can be designated as primary.

private User access setting that means other ACT! users cannot view the record.

public User access setting that means other ACT! users can view the record.

query A set of criteria for extracting data from a database.

record access Security term used to describe the users that can see a record.

Record Manager Term used to describe the owner of a record. The Record Manager has certain privileges with the record.

reindexing A maintenance procedure that updates field indexes.

remote database A database containing a set of contacts and their related data found in the main database. A remote database synchronizes to a main database.

Restricted user A security role assigned to a user who can only access certain areas of the application and perform specific tasks such as creating contacts and opportunities, scheduling activities, and processing mail merges.

secondary contact A person associated with the current contact, such as the contact's assistant, manager, or business partner. Secondary contacts can be promoted to primary contacts.

security levels Defined by *user roles*, these determine each user's access to information and functionality in a system. In a multiple user environment, security is controlled by a combination of record ownership, each user's role, and record access setting. ACT! provides five user roles. These may be further defined by the operating system's security.

server A computer or a software package that provides a specific kind of service to client software running on other computers. "Server" can refer to a particular piece of software, such as SQL Server, or to the machine on which the software is running.

shortcut keys A key or key combination used to perform a defined function.

Standard user A security role assigned to a user who needs to access most areas of the application and information in the database. This is the default user role. A Standard user can be assigned additional permissions. See *permissions*.

static Items that are fixed and cannot be changed unless by user interaction. For example, contact records that are individually selected as members of a group will continue to be members of that group unless the user removes them. Static items are not defined by a criteria like *dynamic* items are.

status bar The text at the bottom of a program or system desktop showing information about the data on-screen or the currently selected menu command.

subgroup A subset of a group. A group might include all contacts who live in the same state; they may be further divided into subgroups by towns.

Subscription List Additional contact records that a user can synchronize to their remote database. Records added using the Subscription List are fixed, or static.

supplemental files Include files such as templates, layouts, reports, and e-mail attachments.

synchronization The process of allowing multiple copies of the same data to exist in different places at the same time, tracking the changes to the data in multiple places, and transporting the changes from one database to another. Synchronization occurs between a main database and remote database(s).

synchronization log A record of the synchronization sessions between the main database and the remote database(s).

Sync Set Set of users who can access a remote database and the collection of contact records that the users can synchronize with the main database. The synchronized records include group and company records that the contacts are members of. A Sync Set designates the records to synchronize between a main database and remote database(s).

System - editable field A type of system field that cannot be deleted and can be modified only minimally. For example, the Contact field is a System - editable field.

System - not editabl field Fields installed with the database and maintained by ACT!, such as the Last Meeting or Edit Date fields. These fields can only be modified on layouts.

template A form or outline that contains formatting and text.

unpacking and restoring The process of setting up a remote database and all files to synchronize with a main database.

URL An acronym for Uniform Resource Locator. An address that is used by a Web browser to locate a Web or FTP site.

User-defined field A field type that users can create, modify, and delete. Default user-defined fields are available for customization.

user roles A designation that determines access and permissions within ACT!. The roles are: Administrator, Manager, Standard, Restricted, and Browse.

workgroup A group of users sharing computer data, often over a local area network (LAN).

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