



## June 2003

### THIS MONTH:

## Updating and Calculating

### ACT! Your Age

Do you know that you can calculate a contact's age within ACT!? This meaningful information is useful for many businesses, including health-care, financial services, insurance, and real estate, as well as human resource departments.

Victoria Marechal - - - - - Cover Story

### Updating ACT!

One of the routine steps that you should perform on a monthly basis is to check the ACT! website for updates to the program. Fortunately, the function of executing an update is built in to ACT!, making it an easy and painless process.

Douglas Wolf - - - - - 3

### QuickQuote ACT! Link

Most sales people find that ACT! has assisted them in becoming more organized, focused, and, therefore, more productive. The Sales Opportunity tab has allowed them to keep track and gauge the probability of closing sales. What ACT! does not do is produce the proposal the Sales Opportunity is based on. But, QwikQuote working with ACT! will.

Charles "Carl" Volz - - - - - 6

### Record Creator and Record Manager: How Palm Link Syncing Affects These Fields

You have your Palm PDA. You have ACT!. Now, you want the two to talk. ACT! has a great little freebie to do just that.

Michelle Scott - - - - - 8

### "Ask Tim": Q&A with an ACT! Pro

Timothy Kachinske - - - - - 10

### Working with MS Word Templates

Word has become the de facto standard for word processing, despite the best efforts of Microsoft to make it unusable - too many features and too much "intelligence" in my opinion. ACT! can use Word as its default word processor, and most companies with which I consult do standardize on Word.

Douglas Wolf - - - - - 13

## ACT! Your Age

Victoria Marechal -- ACT! Certified Consultant

**D**o you know that you can calculate a contact's age within ACT!? This meaningful information is useful for many businesses, including healthcare, financial services, insurance, and real estate, as well as human resource departments.

This tip is suitable for the mature ACT! user, who is familiar with ACTDIAG and macros. *CalcAge* is the free add-on application from Cornerstone Solutions that is small enough (34K) to download in less than a minute, even with a dial-up connection.

Briefly here are the steps for implementing this add-on. First set up two new fields, discover the *Field IDs* with ACTDIAG, download and install the helper application, and finally edit and test the macro. These instructions are for ACT! 2000 or 6.0. The utility can also be made to work for ACT! 3.06 and later versions. Personally, I didn't age too much implementing this add-on. From start to finish, this job took me less than thirty minutes, with nary a new wrinkle on my brow.

### Set Up Fields

In ACT! 2000, you must first set up two fields. For these instructions, we will name these fields *BIRTH DATE* and *AGE*. Of course, you can use any name you choose. In ACT! 6.0, any **new** database you create has a *Birth Date* field by default, so you can use that field with the new *AGE* field as described below. If your

database was *converted* from an earlier version of ACT!, you will have to add both fields.

- 1 Open your **ACT!** database.
- 2 Go to **Edit | Define Fields | New Field**. Type in the new name *BIRTH DATE*. Tab to **Type** and select "**Date**" from the dropdown list.
- 3 Again, click on the **New Field** box. Type in the new field name *AGE*. Tab to **Type** and select either "**Numeric**" or "**Text**" from the drop down list. Click **OK**.

### Find Field ID with ACTDIAG

Every field in your ACT! database has a numeric ID assigned to it. This numerical designation is ACT!'s way of identifying the field. You will need to find the field ID number assigned to the *BIRTH DATE* and *AGE* fields.

- 1 From the *Windows Start* button type in **ACTDIAG**; click **OK**. If it is a multi-user database, you will be prompted to enter the user name and password.
- 2 Go to **Reports | Database Fields**. Locate and select your database and click **Open**. You may be asked if you wish to see the report in Notepad, click **Yes**.
- 3 Scroll down the alphabetical list to locate the names of the two new fields in the left column. Find the *AGE* field and note the corresponding *number/Field ID* in the right column. Proceed to the *BIRTH DATE* field and note the ID number. You will use these numbers to set up the

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## ACT! Your Age ...

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macro in ACT!, so jot down the numbers for future reference.

### Download and Install the Helper Application

**1** Open your Internet browser and go to <http://www.cornerstonesolutions.com/developer.html#CalcAge>. Find the *CalcAge* file halfway down the web page. Click on **free version** to download the gratis software, courtesy of Cornerstone Solutions. You can put it in a temp folder. The exe will allow you to designate an appropriate location upon installation.

**2** Find the appropriate location for macro files to prepare for installation. For new users, this would be C:\Program Files\ACT\Macro; however, for me it is C:\Program Files\Symantec\ACT\Macro. Here's how to find out. Within ACT! you can find this file location by clicking on **Edit | Preferences**. In the *General* tab under *default locations*, use the dropdown selections to find the folder for macros. Highlight it with your mouse and press **Control "C"** to copy the location.

**3** After downloading, find the *CALCAGE.EXE* file in your temp folder. Click on the file to activate. Your zip utility (most of us have WinZip or similar application) will prompt for a location. This would be the location containing your ACT! macro files. If you have copied the location, press **Control "V"** to paste in the location (otherwise type in the macro folder location).

**4** A *Read Me* file will automatically display to help you with the setup too.

### Edit and Test the Macro

**1** Open your **ACT!** database.

**2** Under the **Edit | Define Fields**, find your new field *BIRTH DATE* in the left column and click.

**3** Click on the tab **Triggers** and click **Launch when exiting field box**.

**4** Click the **browse** button (a small button with three dots above) to the right of this box.

**5** Locate and **select** *CALCAGE.EXE* (located within the Macro folder). Click **Open**.

**6** Press the **End** key to move the cursor to the end of the text within the box. Type a single **space** followed by the **Field ID number** of the *BIRTH DATE* field, a **semicolon**, and the **Field ID** of the *AGE* field.

For example, if the *BIRTH DATE* field has the Field ID "60" and the *AGE* field has the ID "61, your command line would read:

```
C:\Program Files\ACT\Macro\CalcAge.exe 60;61
```

**7** When you have finished and the command line is complete, click **OK**.

**8** Now test the macro – Go to **Lookup | My Record** and enter your birthday in your *BIRTH DATE* field. When you tab out of the field, your age will be calculated and automatically placed in the *AGE* field.

Since that was so easy, let me give you a real challenge – remember a friend's birthday. Hint: Just use ACT! and schedule a ToDo.

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*Victoria Marechal is an ACT! Certified Consultant and a QuickBooks Certified Professional Advisor based in Los Angeles, California.*

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**Publisher** -- Howard Flint

**Vice President** -- Sharon Randall

**Technical Editor** -- Douglas Wolf

**Copy Editor** -- Veda James

**Design/Production** -- Token Graphics

Please direct all editorial, advertising or subscription related questions to:

**ACT! Extra** 309 SE 1st Avenue, Canby, OR 97013

1-888-422-9267 -- 1-503-263-8979

Fax 503-829-4207 -- [www.actextra.com](http://www.actextra.com)

**e-mail:** [subscriptions@actextra.com](mailto:subscriptions@actextra.com)

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