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THIS MONTH: Groups

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Add Dimension to Your Projects By Setting Up a New Group

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Using Groups in ACT! is a dynamic way to harness the power of your data. Groups are useful in a number of ways: to track a project with many subcontractors or participants, expedite scheduling a meeting with many participants, send a letter, print mailing labels, or email a number of contacts. It is also helpful when one wants to limit the ACT! to *Palm* synchronization by restricting the number of contacts.

For the sake of illustration, let's use our imagination and pretend you are a Hollywood production manager. Congratulations, you have just been assigned to a recently green-lighted film. You have exactly one day to pull together hundreds of contacts, i.e., production manager, set designer, costume designer, and key grip (don't ask me what that guy does – maybe he holds the keys to the star's sports car), etc. You want to be able to track your production meetings and communicate last-minute script changes to the whole team. You definitely want to set up a group. You will be confident in your ability to quickly notify the crew when there is a schedule change.

Setting up a group is simpler than it is to get a few hundred people together, but

ACT! certainly makes the job easier. Even a novice user should be able to easily pull together a group in ACT!. Groups have been a feature of ACT! beginning with Version 2. The screen captures in these instructions are specific to Version 6, but can be utilized for Versions 4 or 5.

To capsulate the basic instructions to build a Group: Go to the *Group* view, name the new group, and then add the contacts to the newly named group. Subgroups are another interesting way of working with collected data, which will also be discussed in detail. Included in this article are the steps to remove contacts from the group. For more sophisticated ways of assembling a group, see the article in this issue of ACT! regarding *Rules*, which is a macro based selection tool.

Set up a New Group

1. Go to *Group* view. There are two ways to access the *Groups* view in ACT!. The easiest way is to press **F10**. Alternatively, use the view bar and click on the **Group** icon. Notice the top menu changes to include a special drop-down menu titled *Group* (See Figure 1). You can change the layout view of the group screen by using the layout bar at the lower right

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Add Dimension to Your Projects By Setting Up a New Group

Continued from Cover

hand edge of the group view. There are seven layouts to choose from, depending on your display properties or content needs.

2. Name the *Group*. In the *Group Name* box type over the highlighted "Untitled" with the name of your new group. Tab to the **Description** and enter identifying details. Tab to **Priority** and select from the drop-down menu: **high, medium, or low**.
3. Click on the subtab **Contacts** (see Figure 2).
4. Add Contacts to the Group. In the middle of the screen, find the **Add/Remove Contacts** box (see Figure 3) and click it. When you click on this button, you will find a list of all of your contacts. If your contact data can be identified via a field, perform a lookup prior to opening the group to exclude the unnecessary contacts.
5. Select Contacts to add to the Group. To add contacts individually, click on each of the con-



Figure 1. Add Group is the place to begin to work with a new group.

tacts in the left-hand **Select contacts** column (See Figure 4). Click on the **Add** button to populate the group. After you have added a contact, notice that the contact in the left column is now grayed out and it has been added to the Group

membership column on the right. You do not need to do any additional steps to save the group; it is automatically saved (See Figure 5).

6. You can add multiple contacts at once. If the contacts are contiguous, you can use the **Shift** key to highlight the lot. First click on the top of the range of contacts, then press the **Shift** key, go to the bottom range of the contacts, and click. Click on the **Add** button to accumulate the contacts into the group. Or, if the contacts are randomly spread, use the **Control** key to select each contact individually. Hold down the **Control** key as you click on the each contact. Click on the **Add** button to build the group.

Set up Subgroups

The usefulness for subgroups can be utilized for a team or committee within

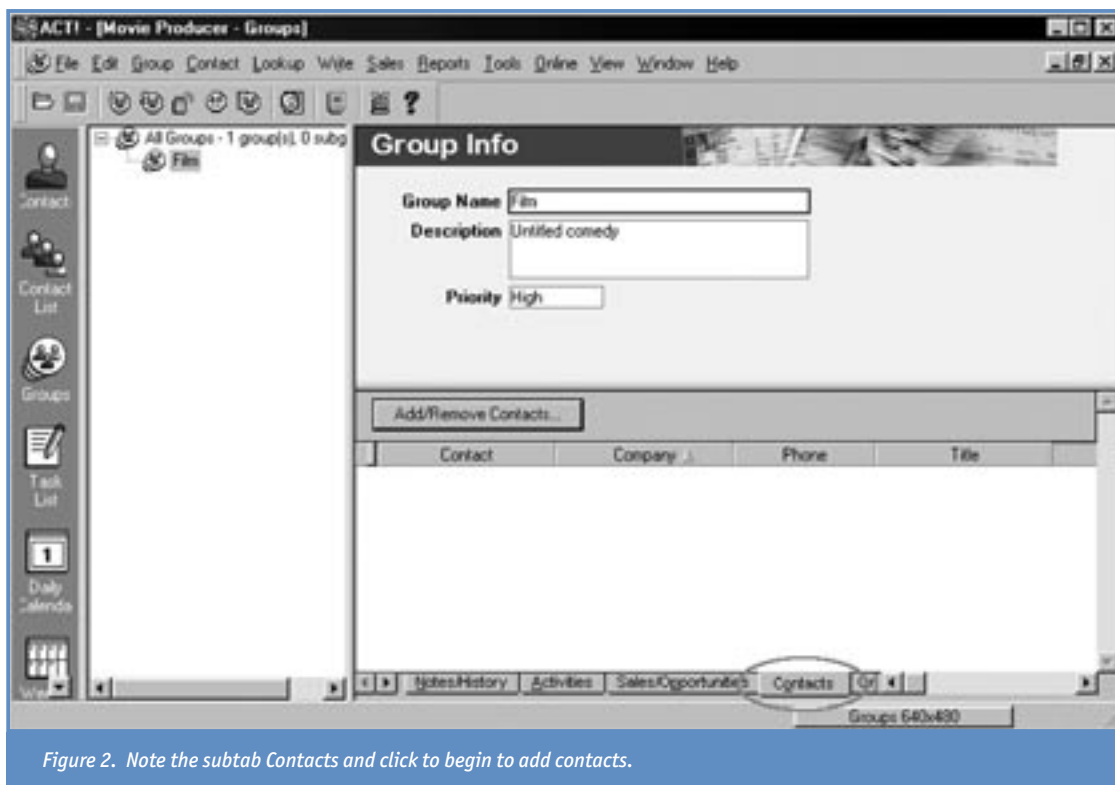


Figure 2. Note the subtab Contacts and click to begin to add contacts.

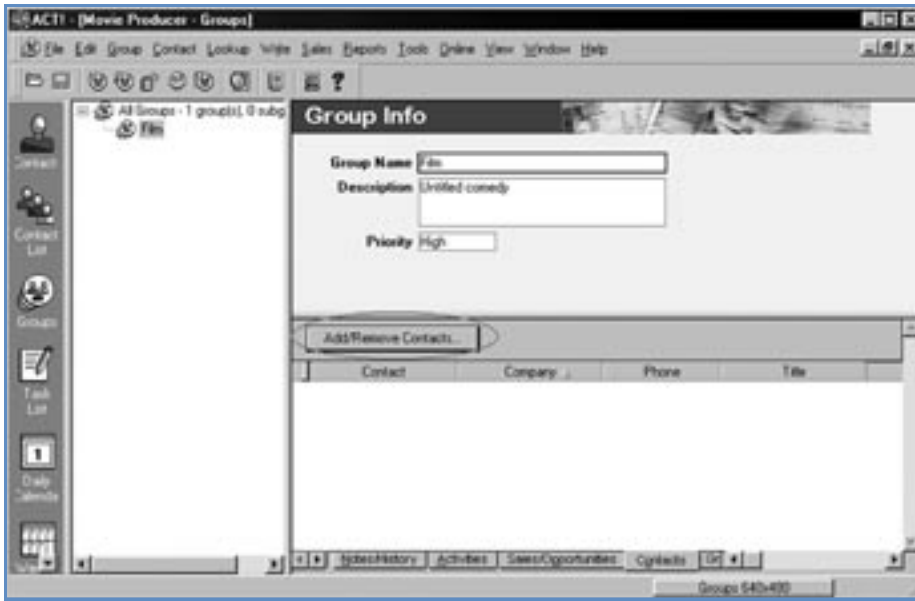


Figure 3. See the button to Add/Remove Contacts

a larger group. Taking the example mentioned above, the subgroup may be the particular crew members required for a particular day's shooting location. To add a Subgroup, select the **New Sub-**

group from the *Group* drop-down menu and follow the instructions beginning with step 4. It is important to note: the subgroup can be made up of contacts from the whole group or may be a

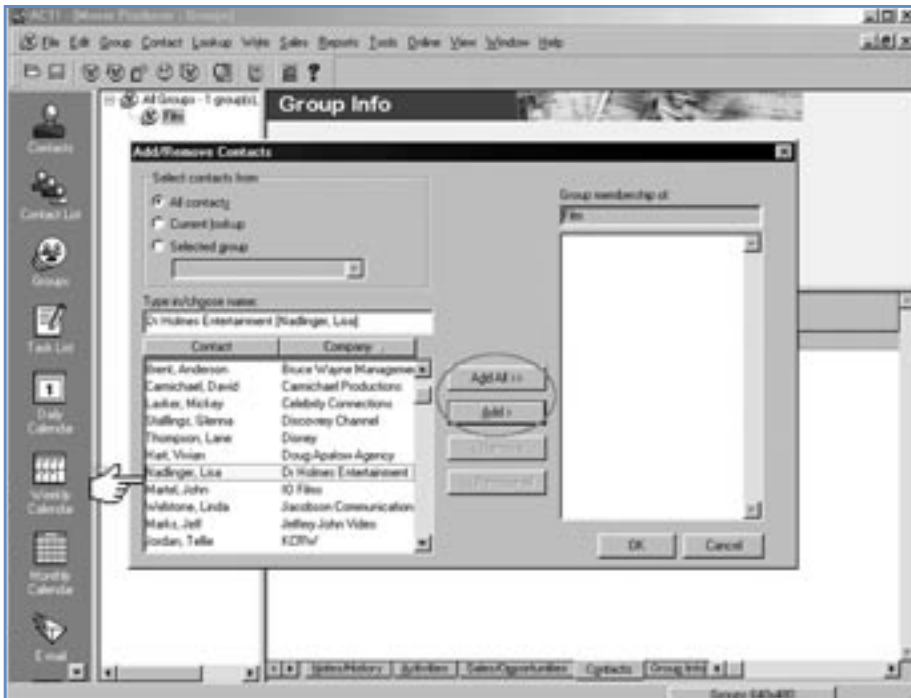


Figure 4. Select contacts in the left column by clicking on each desired addition. Click on the Add button to move the contact to the group list in the right column.

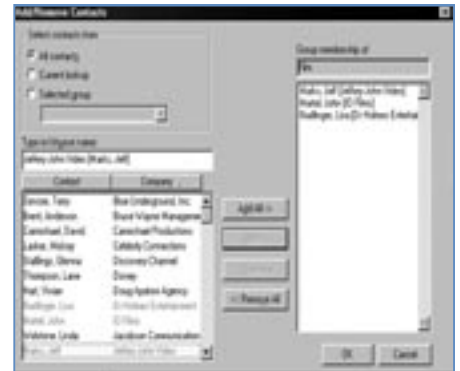


Figure 5. After adding the contact to the group, note some are grayed out in the left column, and the group contacts are in the right column.

contact without being part of the main, primary group

Remove Contacts from the Group

Once the group contacts are in the right column, *Group Membership*, it is a simple matter to reverse the process. By removing the contact from the group, be assured, this action will not affect your basic contact data; it will only remove the contact from the group.

1. In the Group View, go to the subtab Contact.
2. Click on the button **Add/Remove Contacts**. Use the mouse to select the contact to remove.
3. Click on the **Remove** button to pull the contact out of the group. The contact will return to the original form in the left column and will not be grayed out.

Now, you are empowered to set up Groups. You can harness the power of facilitated data to reach out to your contacts to get effective, dynamic results.

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Creating Group Membership Rules

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ACT! has made it easy for users to make sure that contacts are added to their respective groups by creating *Group Membership Rules*. Group membership rules play an important part for companies that use the group function often to organize their data and for those that synchronize databases. Often companies identify their leads using the *ID/Status* field to classify the contacts, such as a prospect, hot lead, client, etc., or they have salespeople that cover certain states, such as MA, NH, ME, VT, CT & RI, which could be placed in a “Northeast” group.

If new leads are being generated daily, people inputting the data need to be very disciplined in remembering to add a con-

tact -- to the group it belongs to -- in the database. Group rules eliminate the possibility of a contact not being added to the correct group.

The Group Membership Wizard will guide you through creating rules for adding contact records to groups.

To create a group rule:

1. Click on the group icon in your contact screen.
2. From the file menu, choose **Group Membership**.
3. Click on **Define Rules** and the Group Membership Rules Wizard appears, as shown in Figure 1.



Figure 2. Group Membership Rules define field values dialog box.



Figure 1. Rules can be based on field values or a saved query.

4. Click the **NEXT** button.
5. Creating a group membership rule begins by identifying how a contact record will be added to a particular group. In this example, I will create a group of contacts that reside in one of the following Northeast States: CT, MA, ME, NH, RI, VT and that have “Hot Lead” in their ID/Status field on their contact record. My rule is based on two fields (field values), which are State and ID/Status.
6. The first rule page appears. Select the contact field that you want ACT! to check when running the rule. The first field value (shown in Figure 2) identified here is the STATE field:
7. Click the **NEXT** button.
8. Click on the first value that matches your rule, such as State equals MA
9. Click **OK**, and the value is added.
10. Repeat the process until all the values you need are selected.
11. Click the **NEXT** button.

12. The second rule page appears. If you want to add a second condition, click on the "use second condition in the membership rule for this group" box. See Figure 3. The second field value identified here is the ID/STATUS field.
13. Click the **NEXT** button. The Group Membership Wizard finish page appears as shown in Figure 4.



Figure 3. Defining the second field value for group membership dialog box.

14. Click the **FINISH** button. ACT! records the rule you created and then prompts

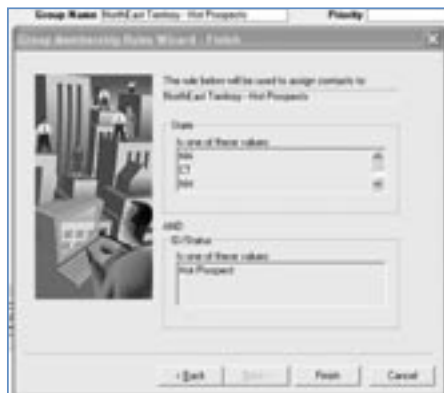


Figure 4. Dialog box for confirming group rule.

you with a dialog box asking if you want to execute the new rule right away. If you need to add more rules, click **NO**. After ACT! runs the rule, a dialog box will appear that displays all the contact records that were added to the group.

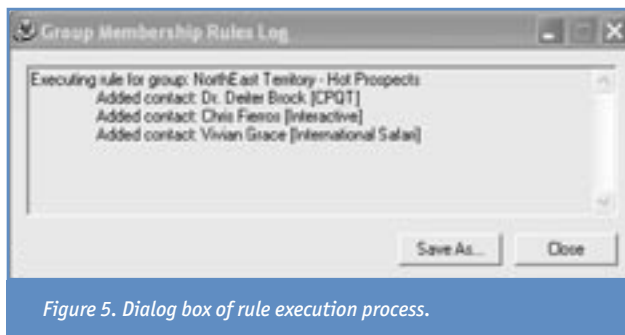


Figure 5. Dialog box of rule execution process.

If a contact record already belongs to the group, it will not be added (see Figure 5). ACT! does not automatically add new contacts to groups based on your rules, except when you first create the rule. In order for the rule(s) to work in the future, you have to execute the process. The easiest way to make sure the groups are updated is to open the *File* menu and select **Set Reminders**. One of the options is Run group membership rules. Set the reminder to appear as often as necessary, and it pops up when you start ACT!. At that point, you click **OK** and rules are processed, updating the groups.

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Synching Using Groups

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Synching using groups is the way to send only the records that pertain to certain sales reps. Let's go through a typical synching scenario. A company has 4 sales reps scattered throughout the country. All sales reps have their own territory and should only see their own contacts. However, the manager needs to see all the contacts. The key here is that groups must be set up and maintained properly to make things work. The first step is to establish the group names. I recommend that you do not use the actual reps' names, but rather the names of their territories. That way, if a rep should change, there is less work involved. Let's call the territories North, South, East and West. In order to set those groups, it's helpful to have some field that identifies that group. This is a good crosscheck with your groups to see that your lookup will equal the group. You could also write Group membership rules, such as If Territory=North, then place in the North Contacts group.

You've got your groups set up, so let's go through the synch setup. Go to **File | Synchronize Setup** and go through the wizards until you reach the screen that says *Synchronization Wizard - Receive What Data?* See Figure 1 if you are in version 6

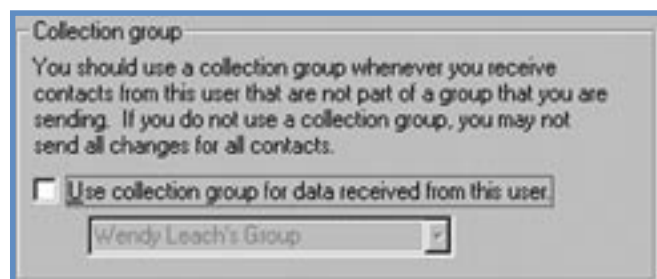


Figure 1. The receive What Data dialog box version 6.0

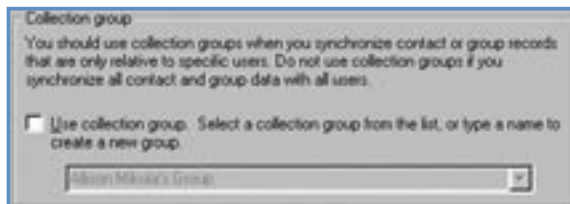


Figure 2. Receive What Data dialog box version 5.0

or Figure 2 if you are in version 5.

Note that there are slight differences in the definitions of collection groups. My understanding of Collection Groups is that there are those records that are a remote user's that are not part of the main group, like West, but still need to be synched. In my experience, I have encouraged clients not to use Collection Groups, as they can be confusing. If you are going to synch records, they should be part of the main group. One thing to note is that if an administrator adds records to the main database, they must be included in a group to be synched out.

As mentioned, Group membership rules can also be used so that the administrator doesn't have to remember to include them in a group. If remote users add a re-

cord, as long as the setting in their synch setup is All Groups All Records, that record will be sent to the main database.

Once you have established what data to receive, you must tell ACT! what data to send (see Figure 3).

Here, we are telling ACT! that for remote user Allison Mikola, we only want to send her the records that are in the East group.

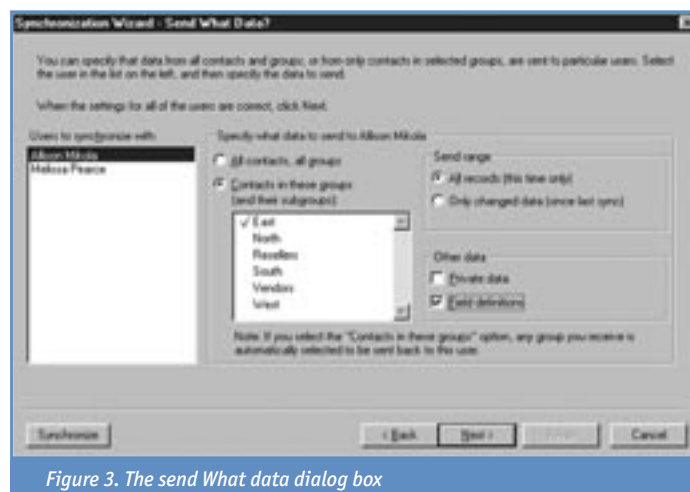


Figure 3. The send What data dialog box

Usually, we will set it up to send Field Definitions, such as drop-down lists. In this case, because it is the first synch, we are sending all the records. ACT! automatically switches this setting to Only Changed Data after the initial synchronization.

If you're going to set up synch, then you should be prepared to set up a test environment to make sure you're getting and sending what you want, or seek the help of a local ACT! Certified Consultant.

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Accessing Your Groups

Douglas Wolf

ACT! Certified Consultant

Author of "How To Do Everything With ACT!"

There are a myriad number of ways to use groups, and in this issue we have only scratched the surface. My favorite use of groups is by event, such

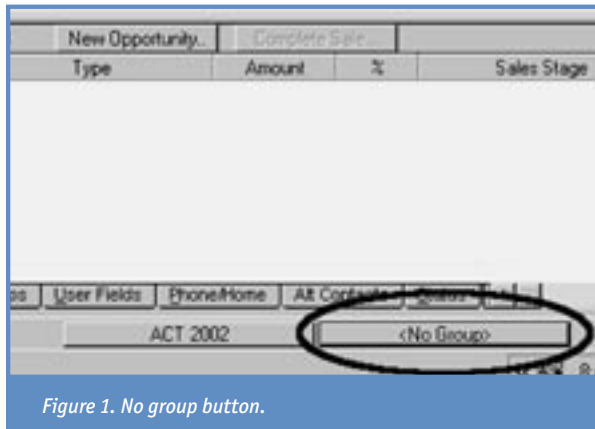


Figure 1. No group button.

as leads from a trade show. By grouping those records, you can easily reach that set of records after the fact.

When I show users groups, they immediately get excited, since many of them had been performing convoluted Lookups using *By Example* or *Keyword* to locate the same set of records. But, after they create the group, it is not obvious as to how to retrieve that group. Most users expect that they would open the Lookup menu and be able to select a group from there. But, it is not so.

The easiest way to select the group is by using the *Groups* button. It is located on the lower right side of the ACT! window, juxtaposed to the *Layout* button and under the *Status* tab. When you start ACT!, the default is <No Group>, indicating that no group has been selected (See Figure 1).

Click the **<No Group>** button, and

a list of all groups appears (See Figure 2). Click the group name you want, and the records in that group appear. If the groups list is quite long, you can scroll or type the beginning letters of the group name to jump to that name.

Another way to select a group is to switch to the *Groups* view by pressing **F10** or opening the **View** menu and selecting groups. Click the **group name** and then open the **Group** menu (not **Lookup**) and select **Create Lookup** (See Figure 3).

ACT! takes you to the Contact view, and the records appear.

When you want to print labels/envelopes/reports for a group, select the



Figure 2. Group list opened.

group, and in the dialog box, you will see three choices: *Current Contact*, *Current Lookup*, or *All contacts*. ACT! treats the selection of a group as the *Current Lookup*, so that is the correct choice.

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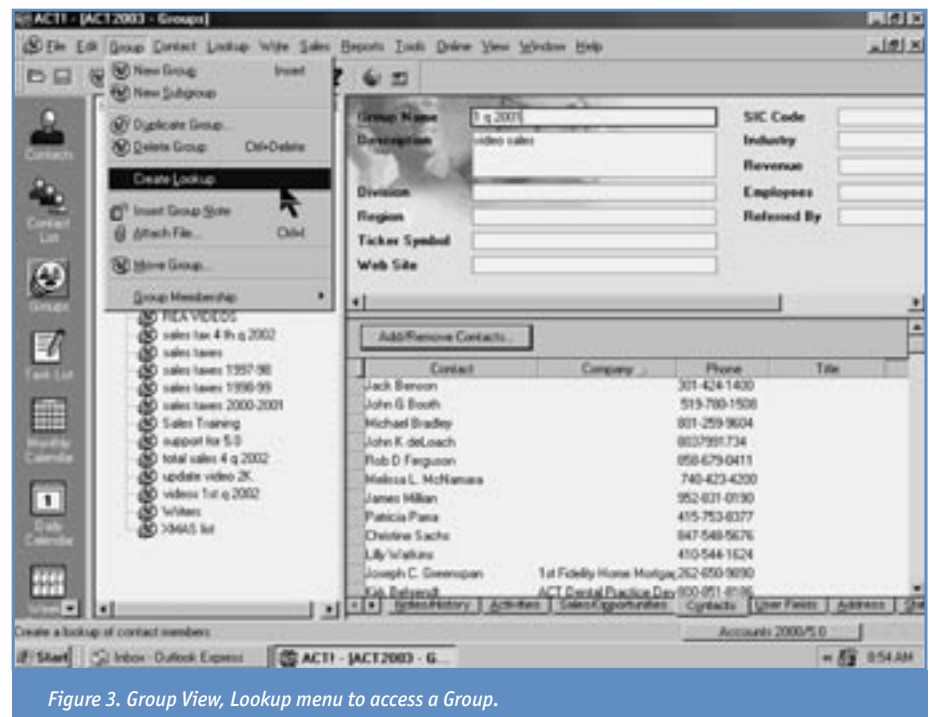


Figure 3. Group View, Lookup menu to access a Group.

Making Groups Automatically

Stan Smith

ACT! Certified Consultant
ADS Programming Services

Have you ever wanted to create groups without having to create them individually? If so, then GroupMaker may be the solution to your problem.

GroupMaker is an ACT! add-on that allows you to create groups automatically based on the contents of certain fields. One example might be creating groups based on the contents of the Company field.

If you wanted to create groups for all of the different companies in your database without GroupMaker, you would have to create the groups individually and then either add the contacts in your database to the groups by hand, or create group rules for each of your new company groups and then run the group rules.

With GroupMaker, all you need to do is select the **Company** field and press the **Create Groups** button (See Figure 1). GroupMaker will then automatically create groups based on the company names listed in the company field for each record in the database. If the Company field contains the value "Best Software"

when GroupMaker is run, a "Best Software" group will be created, and any contact that has "Best Software" in the company field will automatically be added to the "Best Software" group.

Subgroups are treated essentially the same way. If the value in the field you have selected to create groups is based on or contains a value that matches the name of a sub group, the contact will be added

to the sub group. If you want to use GroupMaker to create Subgroups, there is a simple method that can be used. Use GroupMaker to create the group for you automatically and then drag the new group to the group that you want to be its parent group. From that point forward, any contacts that should be added to the group are added to your new sub group.

GroupMaker sells for \$50.00. A demo version can be downloaded from www.actaddons.com. Upgrades for GroupMaker are free and usually just require downloading and installing the new version. If you have any questions or suggestions for the program, feel free to email me at:

ssmith@adsprogramming.com 

Stan Smith is an ACT! Certified Consultant with ADS Programming Services in Birmingham, AL.

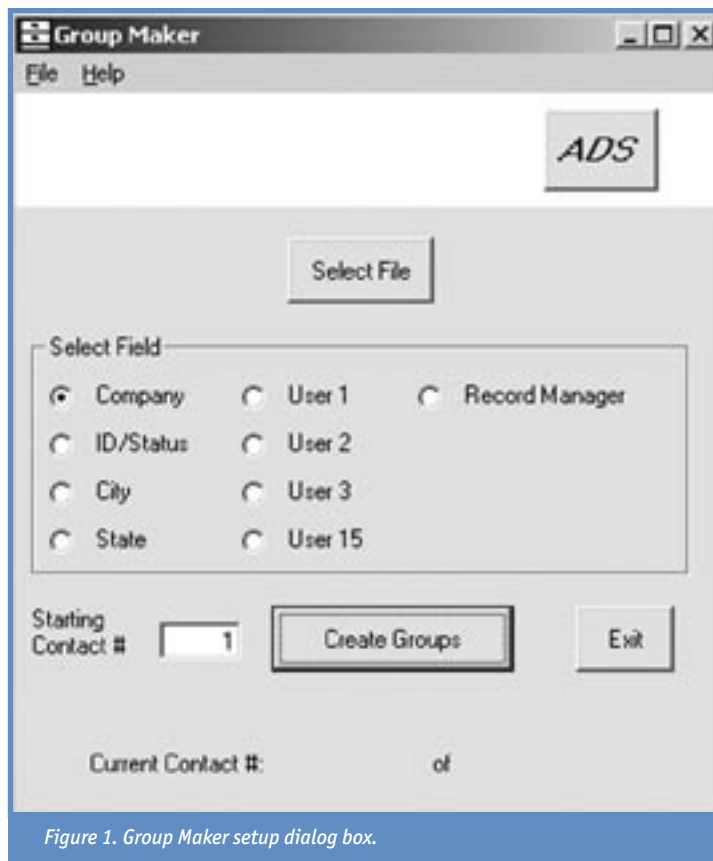


Figure 1. Group Maker setup dialog box.

When GroupMaker is processing the records you have selected, it merely adds the contact to the group, if the group already exists. GroupMaker will not create Subgroups, but otherwise groups and

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Groups – Making the Association

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So, you've seen the *Groups View* button. Maybe you've even created a few Groups so that you can quickly pull up your Prospects, and even created a Group to get a quick view of your Holiday Card list. But, have you ever thought of using your Groups to get a better handle on your Accounts?

On many of the dialog boxes, ACT! is peppered with the field *Associate with group*. This field, which a lot of people just skip over, offers the opportunity to use Groups as a way to manage projects and to get a bird's-eye view of things related to an entire account.

Let's say you are working with **CH Gourmet**. You have a Group created for or named for the account. All of the Contacts you deal with in relation to the CH Gourmet account are members of that Group. Let's explore some of the ways you can use the *Associate with group* feature to better manage your account.



Figure 1. Record History dialog box

Associating Notes & Histories

When you perform an activity that isn't scheduled, a great way to capture that History is by using *Record History*. From the *Contact* menu, click **Record History** (CTRL + H is the keyboard shortcut). The dialog box illustrated in Figure 1 is displayed.

Notice the *Associate with group* field. Click the **Dropdown** and select the **CH Gourmet** Group from the list. This makes direct association between the History you are recording and the Group, CH Gourmet. What that means is, the History entry appears not only on the Contact, it also appears in the *Notes/History* tab for the Group. See Figure 2 for an example of the Group History.

Associating Activities

You can do the same associating with Activities scheduled in ACT!.

In the *Associate with group* field on the *Schedule Activity* dialog box, select the **Group** to which the Activity should be associated. This, like the Record History illustrated previously, links the Activity to the Group. When you clear the Activity, the History is automati-

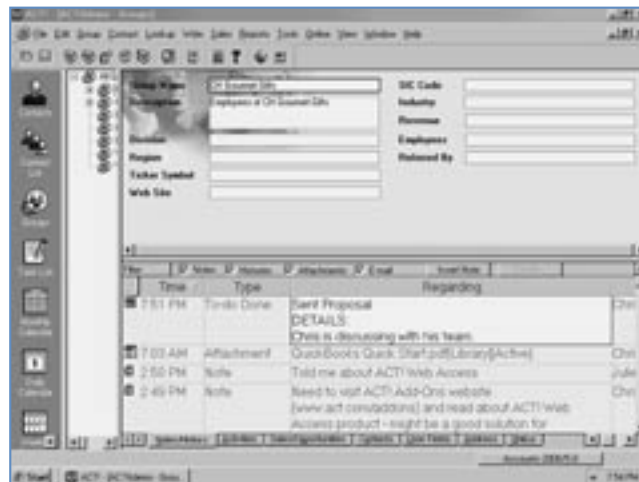


Figure 2. Group History

cally associated with the Group – viewable from the Contact, or when you look at the Group, as an account. Again, this allows you to manage and track your relationships with individual Contacts in your database. With a choice from a single drop-down list, the *Associate with group* field, you have a way to see all the Activities scheduled for the account (Figure 3).

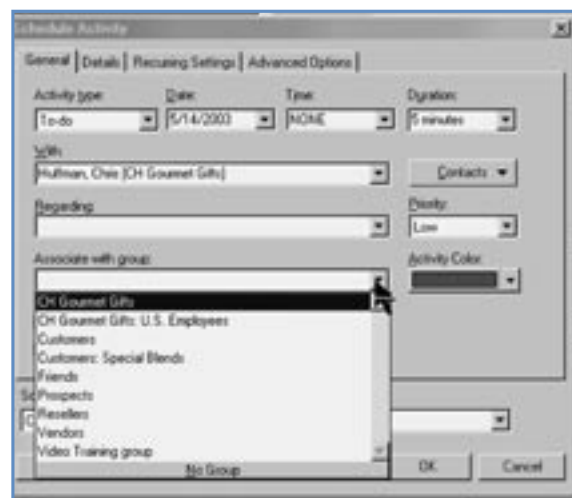


Figure 3. Associating Activities

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Backing Up ACT! 6.0: Preventing the Loss of Data

Tim Kachinske

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Learning to back up and restore your ACT! 6.0 database is one of the most important things you can do as a user. In this article, I'll show you how to make a compressed backup of your database and its associated files. I'll also show you how to restore this database and how to make an uncompressed copy of your database.

All of these features are easy to use in ACT! 6.0. So, once you learn them, I'll also help you get started on a backup plan to avoid the loss of data in your ACT! database.

Never Make Assumptions

Never assume that your system backup program will back up your ACT! database. Should one of your users leave your database open overnight, your server backup program will regard the database files as open and will skip them. Also, never assume your system backup program is doing your backup if you have never tried restoring these backups.

The *Backup* and *Restore* features of ACT! enable you to quickly do a firsthand check on your backed up data. As you and your colleagues build a valuable ACT! database, using the *Backup* features of ACT! 6.0 will give you a sense of comfort and security based on your own knowledge of precisely what is in your ACT! backup files.

Thinking Ahead

Before you do any clicking to start your backup, you will want to think ahead about the location of your backup. By default, ACT! 6.0 will assume you want to put your backup on a diskette in Drive A, but you

will probably want to put your backup in another place.

For the purpose of learning the *Backup* feature, we will use your desktop. First create a new folder on your desktop and give it your first name plus the word "Backup." Next to this folder, create another new folder and give it your first name plus the word "Restore." See Figure 1.



Figure 1. New desktop folders ready for practicing Backup and Restore.

(To create a folder on your desktop, minimize any open programs so that you can see only the desktop. Right-click your mouse, and a pop-up menu appears. Select **New** and from the sub menu, select **Folder**.)

For now, we will use these new folders on your desktop. Later, you may decide to keep your backup files elsewhere.

Starting Your Backup

Now open ACT! 6.0 and then open the ACT! demo database. I always recommend practicing a new feature in ACT! on the demo database. With the demo database open, go to **File | Backup** to open the *Backup* dialog box.

You will see two tabs at the top of the *Backup* dialog box: *General* and *Options*. ACT! 6.0 will open to the *General* tab, but I recommend you start setting up your

backup in the *Options* tab. Click **Options** and look down the list of folders that now appear in the box: *Attached Mail*, *Documents*, *Envelopes*, *Labels*, *Layouts*, *Reports*, *SideACT! Data*, and *Templates*.

These folders store important files associated with your ACT! database, including templates, layouts, and documents you have created in your ACT! merges. Next to each folder, you should see the path showing where each folder is stored. The checkboxes on the far left in front of each folder name indicate whether you want to include a folder's contents in the compressed backup that you are preparing. By default, ACT! includes them by putting a check mark in the checkbox. Now uncheck all boxes. For this backup, you will just copy and restore your ACT! 6.0 demo database.

Before you leave the *Options* tab, look at the *Remind me* feature at the bottom of the box. By default, ACT! 6.0 is set to remind you to back up your database every seven days. If you want to do daily backups of your database, which I highly recommend, then now would be a good time to change this number to **1**. Also make sure the *Remind me* checkbox is checked.

Now go to the **General** tab and click it. Back in the *General* tab, you will set the location of your backup. After the *Current database:* label, you will see the name of the open database, which in this case should be the ACT! demo database as shown in Figure 2.

Look next at the *Back up to:* label and textbox. You will see that ACT! 6.0 has, by default, set the location of your backup in *Drive A*. A compressed copy of the ACT!

demo database will easily fit on one floppy disk, but a more typical working database of several thousand contacts will not. You will want to change this setting so you can put your backup on your desktop, which you can later copy to a larger capacity storage disk such as a CD or DVD. Click the **Browse** button. If you have no diskette in Drive A, you will get an *Insert Disk* message. Click **Cancel**, browse to your desktop backup folder, and

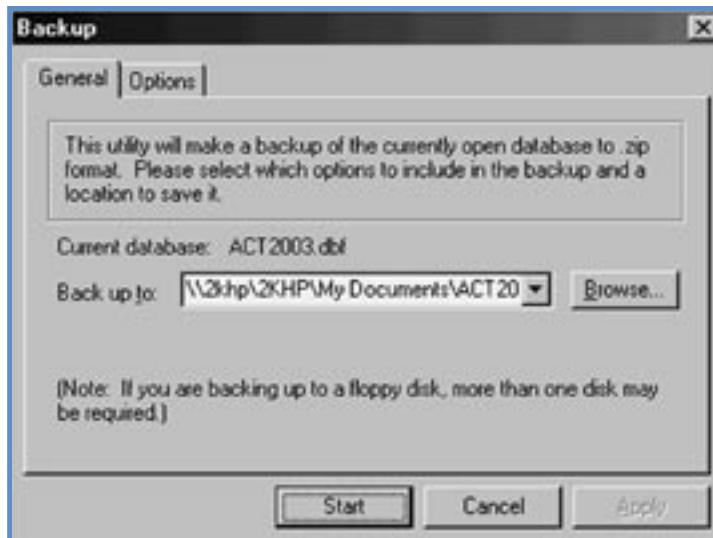


Figure 2. Click the *General* tab to set the location of your database backup in the ACT! 6.0 Backup dialog box and *Restore*.

double-click it. A Windows *Backup* dialog box will appear, and you should see your backup folder selected in the *Save in:* text box. Click **Save**, and you will return to the ACT! *Backup* dialog box. You are now ready to make a compressed backup. Click **Save**.

After ACT! has created your backup file, you can close or minimize ACT! and use Windows Explorer to look at the compressed backup file in your desktop folder. But, don't open it. You will uncompress this file in ACT! with the *Restore* feature.

Restoring Your Backup

Restoring your backup is even easier than creating it because of the built-in *Restore* feature of ACT! 6.0. To begin, open ACT! to any database and go to **File | Restore**. This will open the *Restore* dialog box. Look at the *File to restore* text box. You should see the path to the backup folder you created on your desktop. If you don't see it, browse to the folder and select it.

Next look at the *To folder:* text box. By default, this location is set to your default ACT! 6.0 database folder. Click **Browse** and change this setting to the restore

folder that you created on your desktop. Click **Start**, and you will get an ACT! message telling you that the ACT! database you have opened will be closed, and that your restored database will be opened. Click **Yes** to continue, and in a few seconds ACT! will have completed restoring your backup database, and you will be in the restored backup database that is located on your desktop. It's that easy!

Save Copy As

Learning the *Save Copy As* feature of ACT! 6.0 will enable you to make an uncompressed, identical copy of your database. This is as easy to learn as the *Backup* feature, but before your start, it is absolutely critical that you have made a new folder for your database copy.

Because the *Save Copy As* feature will copy all two-dozen plus files that comprise your ACT! 6.0 database, it is essential that you make a new folder for your database copy. Do this on your desktop right now. To distinguish this folder, give it your first name and then the word "savecopyas."

If you fail to create and use this folder,

you may find all the files of your ACT! 6.0 database spread across your desktop!

Now open ACT! 6.0 and open the demo database. Go to **File | Save Copy As** to open the *Save Copy As* dialog box as seen in Figure 3. By default the *Copy the database* button is selected and the *Database Version* text box has *ACT! 6.0 Database* selected. Leave these settings as they appear.

Next go to the *Filename* feature and click the **Browse** button to open the *Save in*

dialog box. Search for your desktop folder that contains your first name and the word "savecopyas." Select this folder so that it appears in the *Save in:* text box at the top of the dialog box. Then at the bottom of the dialog box in the *Filename* text box, give your database copy a new name. You may want to use six numbers to indicate today's date for this backup copy. Click **Save**, and you will return to the *Save Copy As* dialog box.

Now in the *Filename* box, you should see a path showing your new desktop folder and the six numbers that constitute the name of your database copy. Click **OK**, and ACT! will make the copy.

Now you can close ACT! 6.0 and look inside your desktop folder to see all the files of your database copy. Note that it no longer has the name *ACTdemo6*. You can open this database in ACT! 6.0, or you can simply click on the .DBF file to open it.

The *Save Copy As* feature enables you to make a copy of your database only. You cannot use this feature to make backup

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Who's the Accountant?

You? Did you know that we also publish a monthly newsletter for Peachtree Accounting software and QuickBooks software. Just as important as your wealth of contact information are the numbers. To stay on top of your business you need to know where your numbers are at all times. If you use either Peachtree or QuickBooks, you know that these are robust programs with many features you may not be taking advantage of. Each month you'll get insights from Pros on how to use these accounting packages to their fullest. As with ACT! Extra, we offer a Money Back Guarantee if you are not completely satisfied. You have nothing to lose.

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Backing Up ACT! 6.0: Preventing the Loss of Data

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copies of ACT! folders that contain your templates, documents, and other files associated with your database. Also, the file size of the database you copied with the *Save Copy As* feature is identical to your original database. The compressed copy you made earlier with the *Backup* feature is considerably smaller.

Automating ACT! 6.0 Backups

You can use the ACT! *Reminder* feature to prompt you to do daily backups. This is very helpful for the conscientious ACT! 6.0 administrator. But for a modest investment, you can purchase an excellent add-on program that will do daily backups while you sleep.


AutoAdmin II, a product designed specifically for administrators of ACT! 6.0 databases, will do a daily compressed backup and give each day's backup a new name so you can automate a historical backup of your data. You can also automate your daily database maintenance and synchronization with AutoAdmin II. These important functions can be set to a time of day that doesn't interfere with your work. Dollar for dollar, AutoAdmin II is probably the most valuable investment you can make toward the long-term preservation of your ACT! 6.0 data. To learn more about AutoAdmin II, go to www.actaddons.com.

Begin Developing a Backup Plan

Learning the Backup, Restore, and Save Copy As features of ACT! 6.0 are important first steps in developing a systematic backup plan. The frequency of your backup

procedure will depend on how much data you can afford to lose. Some people can recover from a day's loss, but most find it difficult to recover from the loss of a week's or month's worth of data.

Never write over a backup. Always rename a backup. Should you wisely choose to do daily backups, you can use a naming protocol containing the six numbers of the date of a backup. Later, when you need to restore deleted data, you can find and recover this data from an earlier backup.

Over time, you will want to store your historical backups on a reliable media, and probably even keep these backups at another secure site. Making backups is important, but so is checking them from time to time. It only takes you a few moments to restore a compressed backup to ensure that the data is really there and easily accessible. If you keep your backups on CD's or DVD's in a safe place, you will always be able to restore data quickly and easily with the ACT! 6.0 *Backup* and *Restore* features. 

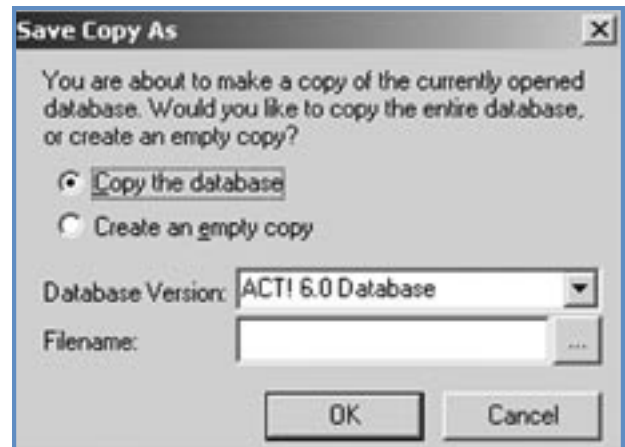


Figure 3. Set the location and name of a database copy in the *Save Copy As* dialog box.

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“Ask Tim”: Q&A with an ACT! Pro

Tim Kachinske
ACT! Certified Consultant
Innovative Solutions, Inc.

May’s mailbag brings some very interesting questions from ACT! Extra readers. Some ACT! users want help with their lookups. Basically, any data you put into ACT!, you can get back, so long as you know how. Other ACT! users need a little help adjusting their Views to make the ACT! interface work better for them. Let’s take a look at these and other questions from ACT! Extra readers, as we all work to get the most from the world’s greatest contact manager.

Q I am a long-time user of ACT!, and I would like to do a lookup of every contact in our database for which I and my staff have created a sales opportunity. I have eleven salespeople using the database. I don’t want to see any closed or lost sales in this lookup -- just sales that are still pending. Can we do it?

Rodney, Illinois

A I recommend that you take a look at Advanced Sales Lookup. This modestly-priced add-on will enable you to do a lookup of every contact with an opportunity, and it will do so with just a couple of clicks of the mouse. Once you have Advanced Sales Lookup installed, you need only click the ASL button on your toolbar to open a Sales/Opportunities Lookup dialog box. In the Define the type of lookup feature, click the Contacts with Sales/Opportunities button, and then choose to replace, add to, or narrow your lookup. Click OK, and you will have the lookup you need.

Advanced Sales Lookup will do much more. For example, it will allow you to perform lookups for opportunities that have empty fields. This will enable you to quickly identify and clean up your data so that your reports are thorough. You can also do lookups of one or two “conditions,” such as a lookup of all the contacts with an opportunity for a specific product and a specific sales stage.

To learn more about Advanced Sales Lookup, go to www.actaddons.com and look for Advanced Sales Lookup in the Product Name directory tab.

Q I just upgraded to ACT! 6.0, and some of the new icons on the toolbar look odd in this new version – especially the handshake icon that schedules a meeting. Is there something wrong with my installation, or is this how the new icons look?

Joseph, California

A You’ll find that most of the icons on the ACT! 6.0 toolbar look better when you have your toolbar buttons set to large mode. In the Contact view, click the View | Customize Contacts Window. In the Toolbars tab, select Large buttons in the Button size area. Click OK, and ACT! will enlarge the icons on your ACT! toolbars.

Q I use most of the icons on the ACT! View Bar, but they don’t all fit on my screen. I have to scroll to see all of the icons. Is there a way to get smaller icons on my View bar?

Pierre, Alberta

A If you have a small monitor, or if your resolution is set to less than 1024 x 768, you might consider setting the View Bar to show small icons. When you do this, you’ll be able to see all of the view bar icons on one screen.

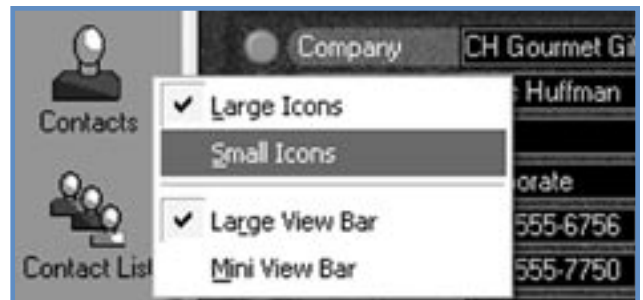


Figure 1. Right click anywhere in the View Bar to select the Small Icons option.

To set the view bar to show smaller icons, right-click somewhere in the View Bar and select the Small Icons option as shown in Figure 1.

If you frequently use a particular view – like the Email view – you might want have the email icon on your view bar near the top of the screen. Using your mouse, just click and drag the email button to a top placement on the view bar.

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Q Why does ACT! always put a [1] in front of my contacts' phone numbers?

Judy, Indiana

A For phone numbers to be correctly formatted to your country of residence, the phone number in your My Record must be filled in.

If your My Record does not have a valid phone number, every phone number in your database will show a [1] at the beginning of the field.

Q Last week, my boss somehow deleted about 100 contacts in our database, and none of us can figure out what he did. He claims that he didn't delete each contact, and I just can't understand how he could have deleted so many people without realizing it. Can you help us?

Robbie, Washington

A He probably tried to delete one contact in your database and instead deleted an entire lookup of contacts. If you perform a lookup in ACT! and click **Contact | Delete contact**, you will be presented with two options: 1) to delete the current contact and 2) to delete all contacts in the current lookup.

If you click the **Delete Lookup** button, every contact in your current lookup will be permanently removed from the database. It's a good idea to make a backup of your database before deleting any contacts. If you have a current backup, you could export the missing contacts from your backup into the new database.

Q I went into Edit | Preferences, and in the Names tab, I changed my database to automatically fill in the Salutation field with each contact's last name. But, I can't get ACT! to apply the change to the contacts in my database. Am I missing a step?

Joe, Texas

A The change you made only affects new contacts added to the database. When you change the default salutation options, ACT! will not retroactively change all of the salutations you've entered into the database. Only new contacts are affected by changing the salutation preferences.

If you'd like to automatically change the salutation field for each contact in your ACT! database, check out Oak!Check! from Alliance Technology Group. You could use the update salutation feature in Oak!Check! to retroactively change your contacts' salutations. Visit www.actaddons.com to find out more about Oak!Check!.

Q When my colleagues are in the Groups view, they see a list of groups in the database. On my computer, I don't get this list. How can I have it, too?

Helen, New Jersey

A Most likely, the separator bar that divides the list of groups from the rest of the Groups view has been moved so far to the left that the list of groups has disappeared.

The groups list is a handy directory of all the groups and subgroups in your database. You can make the list wider or narrower by dragging the vertical separator bar that divides the Groups view into two

main sections.

To get your groups list back, hover the cursor over the separator bar. You will find this separator bar just beyond the left edge of the Contact View bar. When the cursor turns into a double-pronged arrow, hold down the left mouse button, and when you see a wide line appear, drag the line to the right an inch or so, and then let go of the mouse. Your group list should appear. Adjust with the mouse to make the list wide enough to show your group and subgroup names.

Q We changed network drives recently, and none of our attachments work anymore. How can we get our document attachments to work again?

Melissa, Kansas

A If you move a folder containing files that have been attached to ACT! contacts, you can reattach these contacts easily with the Attachment Migration Wizard, available from the Database Services unit of Best Software.

The Attachment Migration Wizard is also useful for reattaching documents that you've relocated from your desktop computer to the network server. If you're sharing an ACT! database with other users, and if you want other users to be able to double-click and launch attached files, you'll need to attach files that are stored on a shared network resource. If you would like to synchronize documents with other ACT! users, ask your system administrator about Windows' Offline Folders feature.

Go to www.actaddons.com for more information on the Attachment Migration Wizard.

Q We write a lot of correspondence from within ACT!, and our remote sales reps are always attaching documents to the database. The problem is that we need to be able to see those documents here in the office. Even if the reps send us the documents, we can't use the automatic links to the documents in the Notes/History tab. How can we synchronize these documents with ACT!?

Greg, Connecticut

A If you're sharing an ACT! database with other users, and if you want other users to be able to double-click and launch attached files, you'll need to attach files that are stored on a shared network resource.

If, for example, you attach a file on your local desktop, other users will receive an error when they attempt to launch the file from the Notes/History tab. This is because ACT!'s attachment feature only provides a hyperlink to an existing document. Attaching a document to an ACT! contact doesn't actually imbed the document into the database.

If you would like to synchronize documents with other ACT! users, ask your system administrator about Windows' Offline Folders feature. Your remote reps could attach documents to an offline folder, and when they log into the network, the documents would sync back onto your network drive – and the attachments would work.

Q Each user in our database gets a different number of contacts when they do a lookup of All Contacts. Is the database corrupted?

Sally, Maine

A The database probably isn't corrupted, but I wouldn't rule that possibility out without actually seeing the data. Your local ACT! Certified Consultant could check your database for possible corruption, but here are a few things to try first:

On some slow computers running large ACT! databases, looking up all contacts will show an inaccurate number of records. For an accurate record count, run a Database QuickCheck in the ACT! Diagnostic Tool. To launch ACTDIAG, click **Start | Run**. Type ACTDIAG and press Enter. Then click the QuickCheck button and select your database. The QuickCheck results will show exactly how many contacts are in your database.

Another possibility might be the existence of private records in your database. You can see if any users have private records by running a user report in ACTDIAG. In ACTDIAG, click Reports | Users Report and select your database. If you're logged into ACT!, you'll only be able to see your own private records. Even someone with administrator rights to the database won't be able to see other users' private records.

Q Can I add additional fields to the Lookup menu?

Frank, Virginia

A No, but if you click inside a field in the Contact view before performing an Other Fields lookup, ACT! will automatically bring up the field you clicked when clicking Lookup | Other Fields. This trick only consistently works in ACT! 6.0.

Q We're looking to clean out some of the old junk in our main corporate database, and I can't figure out an easy way to get rid of the old dead wood. Right now, we're manually going through each contact in the database and deleting notes and contacts that haven't been edited in more than five years. If you have any suggestions, we sure would appreciate it.

Mike, Illinois

A In ACT! 6.0, you could perform a contact activity lookup to find contacts that haven't been modified in the last five years. Click Lookup | Contact Activity to begin your search.

You might also want to check out the Database Cleanup Wizard from Best Software. The Database Cleanup Wizard will automatically remove selected types of information from your database that were edited in a given date range. You'll find that this program is quite flexible. You can even specify that you only want to remove certain users' old data. For more info, go to www.actaddons.com.

Q The Contact List view in ACT! is soooooo slow. It would be a really great feature if y'all could just get it to run a little faster.

Brian, Georgia

A Try removing the Email Address field. A Contact List view that does not show the email address will run about 200% faster. For more tips on speeding up your ACT! database, check out Edward Kachinske's article "13 Ways to Speed Up Your ACT! Database" in the March 2003 issue of ACT! Extra.

Groups – Making the Association

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Figure 4. Add the Groups column to your Contact View tabs

The Overall Association

You'll notice *Associate with group* fields on *Sales/Opportunities* also. The same functionality described for *Notes/History* and *Activities* applies. Now that you know how to do it, just what is the benefit? This Group association offers a "higher-level" view of your accounts. You can, of course, look at the individual Contacts and see what is tracked within the Contact's tabs – Histories, Activities pending, and sales being worked. It's likely that when you work an

Account, you deal with several people at that company. Creating a Group and associating those Contacts is a nice way to keep the Contacts organized. Associating Histories, Activities, and Sales/Opportunities to the Group lets you use the Group record to see everything that has happened, is pending, and what you are selling to all of the Contacts in that Account. Account management then becomes possible, just from choosing the Group in that often overlooked Associate with group field.

One Step Further

Try adding the Group column on your Contact tabs. When you are on one of the Contact tabs, Notes/History for example, **Right-Click** on the tab. A menu appears,

shown in Figure 4; select **Add Columns**.

Highlight **Group** and click **Add**. A column labeled *Group* is added to the tab you are viewing. Repeat this on the Activities Tab and Sales/Opportunities tab. If a Note/History, Activity, or Sales/Opportunity is associated with a Group, that Group is displayed in the newly added column. See Figure 5 for a sample.

This is a great way to manage Contacts that you may work with on several Accounts.

Michelle Scott is an ACT! Certified Consultant working in Maryland with Zip City Solutions, Inc. Michelle and Zip City help their clients improve, implement, and manage their customer data more effectively with ACT!. Zip City also hosts the Maryland and DC area ACT! User's Groups.

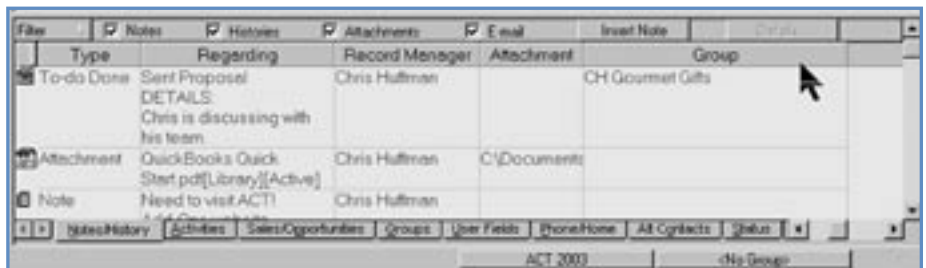


Figure 5. Sample Group Column on Notes/History tab

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