December 2004

Looking up dates in ACT! 2000 and ACT! 6.0

I n my business, I record the order date for the sales of my video or CD-ROM training for ACT!. I've even created some queries that would first search the *Id/Status* field to find records with either the word video or the word CD and then do a date search by a range to locate the records in a certain time frame.

With the release of ACT! 2000, my queries didn't work — this is because the year 2000 changed the lookup rules so that you must have the year in four digits. Ergo, to locate a specific date such as December 15, 1999, the date must be entered as 12/15/1999. This article looks at a simple date search and some other ideas on using dates to find records.

Date Ranges

A simple date range formula can be created to locate records. One use of this technique is to locate records that have been added to the database after a certain date. Try this with your database:

1   Open the **Lookup** menu.
2   Select the **By Example** option. The ACT! record screen appears as a blank. (The trick may be locating the Create Date field, as its location depends upon the layout you're using. On the Essentials 1024x768 layout, it's on the *Record Info* tab. On the ACT! 2000/5 layout, it is on the *Status* tab.)
3   In the *Create Date* field, type a greater than sign (**>**).
4   Next, enter the date that you had written in the correct format (see **Figure 1**).
5   Click the **Run** button, which is the green exclamation point on the toolbar (see **Figure 2**).

ACT! locates all the records that you've created a day after the date you
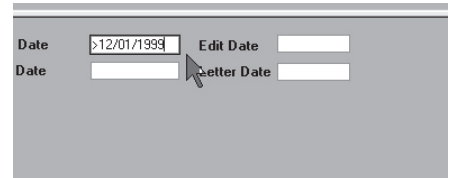
Figure 1. An example date entered into the Create Date field.

Figure 2. Nebulous Run button.

entered. So, if you were trying to find all records created from the beginning of the year, your date entry would have to read **>12/31/1999**.

Further, you can use the less than sign, **<**, to locate records that were created before a date. So, to locate records created before the year began, use the same method as before with the entry **<01/01/2000.**

To find a set of records created in a specific time period, enter the

Looking up dates...
Continued from page 1

first date and then type two periods: **12/31/2003..12/31/2004**.

Edit Date
You can also lookup records using the **Edit Date** field using the same method. I often run this type of query, with a date that's 18 months old, when my client has a large database (5K records or more) to determine if in fact all the records are in use. Whatever date you enter, ACT! finds all the records that have had field changes, <u>but</u> — and this is an important but — if a note is added to a record or a history is created, that's <u>not</u> considered an edit! To further refine my prior search, I run the Notes History report and select the Current Lookup, the same date range, and print any records to a file.

Contact Activity
In ACT! 6,0, you can also run the Lookup/ Contact Activity process, which al-lows you to find contacts based on field changes and/or specific types of activities or histories. The variations are nearly endless, and you can, for example, drill down to locate contacts that you sent a letter to in a specific week (see **Figure 3**). ◆

> **Note:** ACT! 2000 didn't consider the addition of a note to be an "edit" — ergo, if the contact record's only change was the addition or modification of an existing note, the value in the *Edit Date* field wasn't changed. In ACT! 6.0, this was changed so any data added/modified would reflect a new date.
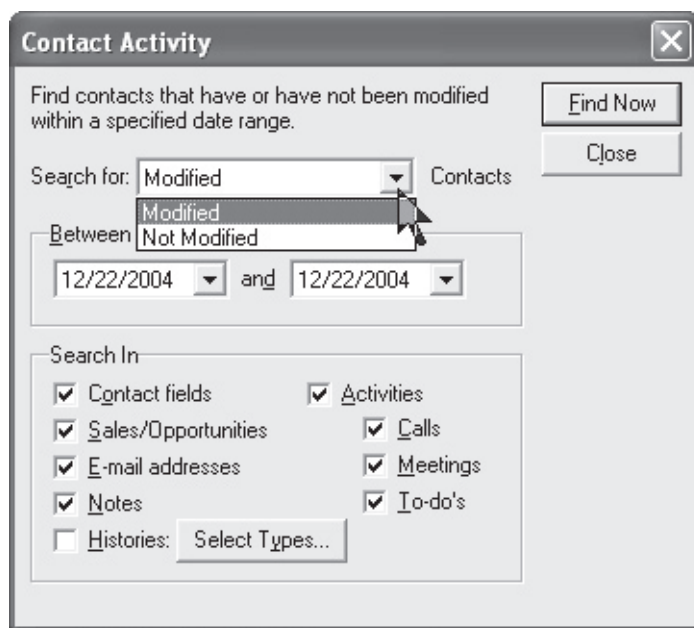
Figure 3. Lookup by Contact Activity dialog choices.

This publication is intended as a general guide. It covers a highly technical and complex subject and should not be used for making decisions concerning specific products or applications.

Articles and advertising in ACT! Extra may or may not reflect the views of Buzz Publishing Inc. or Best Software, makers of ACT!.

Working in the Contact List View

Many ACT! users have never looked at the List View of contact records in ACT! and so are missing out on a powerful way to work with their data. When I teach ACT!, I show the List View as part of the lookup process.

As an example, I have the class working in the ACT6DEMO database and ask them to do a lookup by state, using TX (Texas) as the entry. The result of the lookup returns more than one record. Next, I have them switch to the Contact List as follows. To see your contacts in List View, click the **Contact List** icon in the **View** bar, or, open the **View** menu and select **Contact List**, or press **F8** (see **Figure 1**).

The contact records now appear in a spreadsheet format with the column headers reflecting the field names. What you see is the default column view, starting with the Company column.

> **Note:** If the e-mail field is one of the columns, it dramatically slows performance. I remove it for regular use and add it back if needed.

> You cannot sort the records in this view by e-mail address.

By executing a lookup that returns more than one record, and then switching to the List View, it's easy to quickly scan the list of records for the exact one you want. (In the new ACT! 2005, if more than one record is returned by the Lookup, the List View is automatically opened.) To see a single record, double-click the gray box at the left edge of the record and ACT! goes back to the form
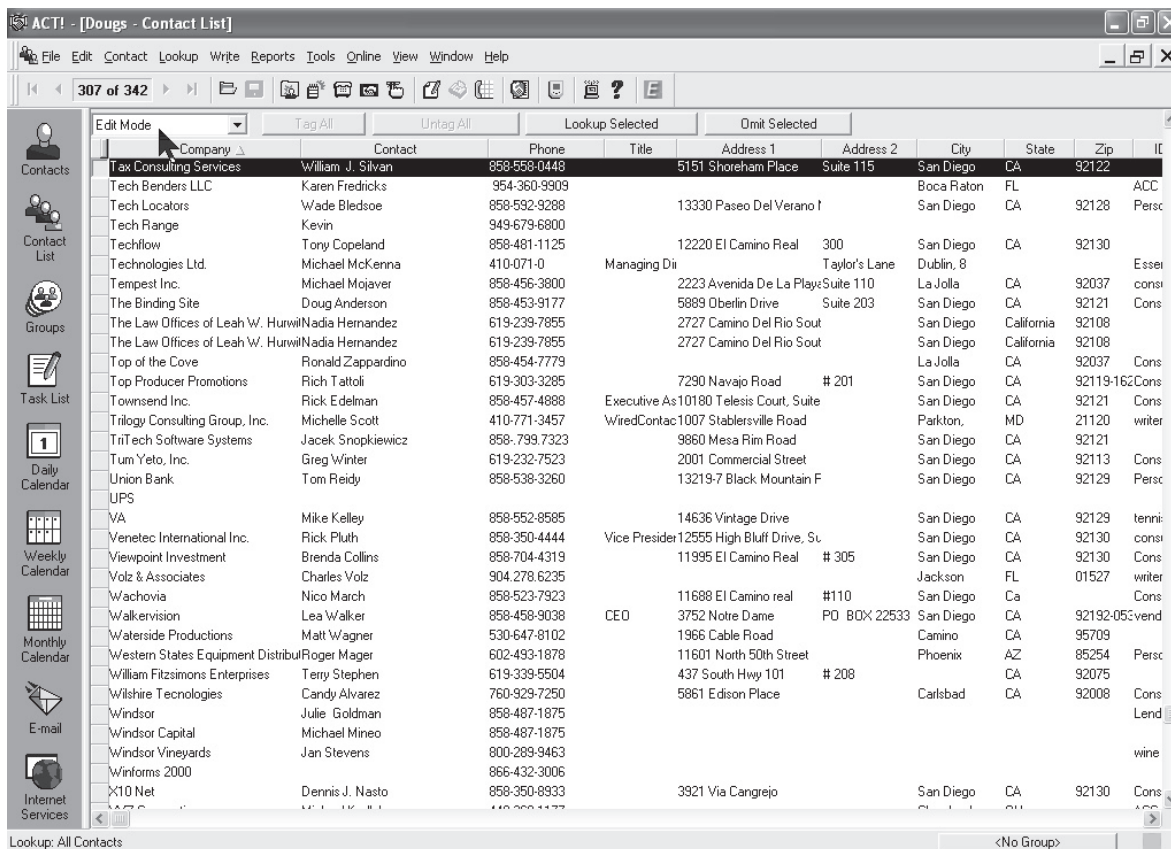
Figure 1. List View of records.

Contact List View...

view — a single record. The lookup remains in effect.

What many users don't know is that you can arrange the columns to your liking and the setting is sticky — that is, the next time you run ACT! and switch to List View, the columns are arranged as you left them. In the example of looking up by state, you may not be able to see the state column (depending on your resolution settings), as it's too far to the right of the list window. So, the next exercise is to move the column.

To move a column in the List View:
1   Click the column header and hold down the mouse button.
2   Drag the column left (or right) as you prefer.
3   Release the mouse button to drop the column.

If you want to move the column to a position that's not in the view, drop it next to the right or left border, scroll the window horizontally, and then click, grab, and drop the column again.

If you have several ways that you want to see data in the List View, and would like to save the settings so that you don't have to reconfigure the columns every time, you can purchase a utility from **www.tnhg.com** that adds the capability of saving several views for later recall.

Sorting the List
When you switch to List View, the records are sorted in one of two ways. If you ran a lookup, the records are sorted on that field. If you simply switched to List View, the company field sorts the records and, if the record doesn't have a company entry, by the last name of the contact.

You can discern the sort column and its order by scanning the column headers for a small gray triangle that is to the right of the column header name and points either up or down (see **Figure 2**).
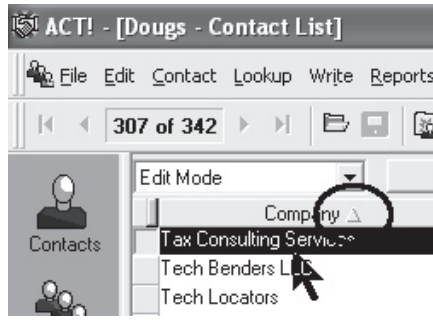

Figure 2. Triangle indicating column sort order.

To sort the list on a different field:
1   Click and release the mouse button on the column header. ACT! reshuffles the records by that field. The default is ascending order — A, B, C.
2   Click the same column header again to reverse the sort order to descending.

Working in the List View accelerates your locating a specific record from a lookup, makes it easy to confirm that the lookup was performed properly, and gives you a different look at your data.

A Hidden Feature
One of the features of the List View is the ability to jump to records by typing the beginning letter(s) of the column that's currently the sort. The funny thing is that this feature isn't obvious and most users find it by accident.

Give it a try by switch to List View and not clicking anywhere on the screen. The default sort is by company, and if you type the letter "T" a small window opens at the top of the list with the label Look for and the record jumps to the first company name that begins with the letter T (see **Figure 3**).

Many of my clients work exclusively this way, jumping from record to record and then right-clicking to access the phone dialer and ring up the contact.

This technique only works in Edit mode, not Tag mode.

Adding and Deleting Columns
The arrangement of the columns is a sticky setting — when you return to List View after exiting ACT!, the columns look exactly as you left them. If you're working on a shared ACT! database, your settings don't affect anyone else.

To delete a column:
1   Click and drag the offending column header toward the top of the ACT! window.
2   When the mouse pointer magically transforms into a small garbage can, release the mouse button (see **Figure 4**).

Relax; you haven't deleted your data, just that column in the List View.

To add a new column or one you've removed:
1   Scroll the List View to the left so that you have white space in the
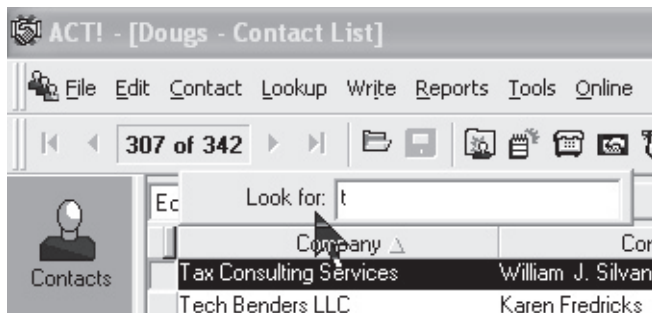

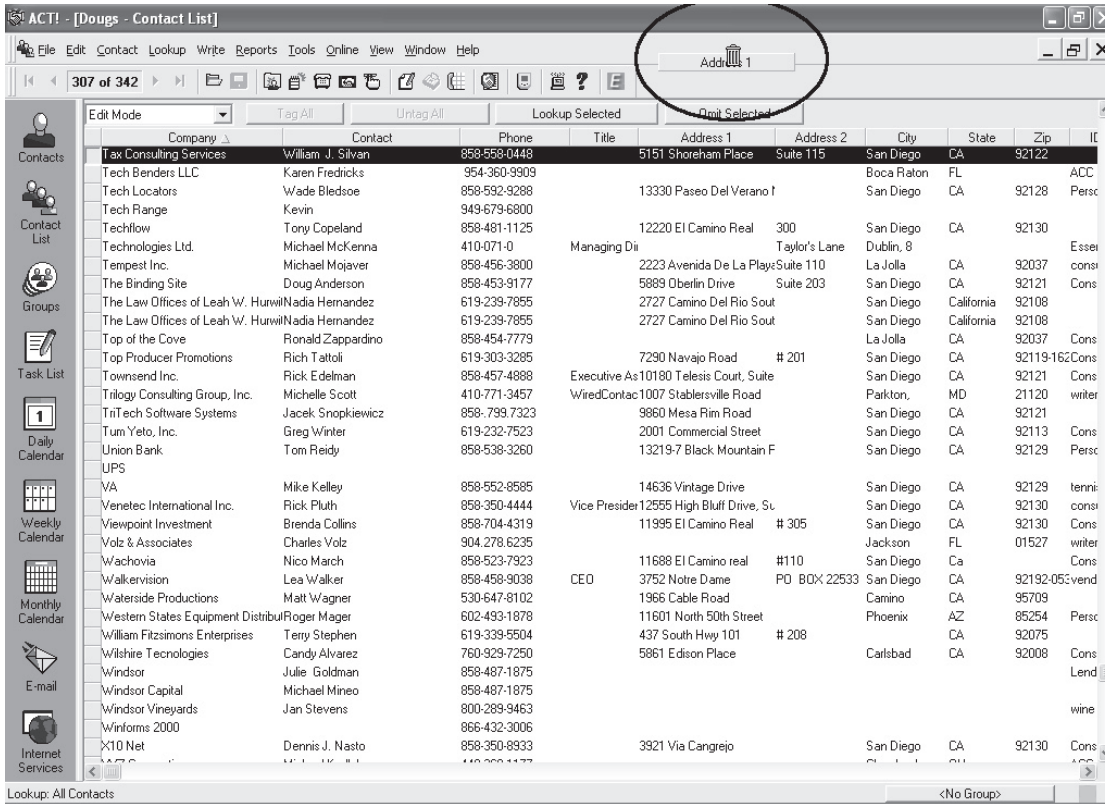**Figure 3**. Look for the window open at the top of the list.

Figure 4. Icon for deleting a column.

window.

2 Right-click the mouse in the white space.

3 From the popup dialog box, select **Add Columns**.

4 The Add Columns dialog box appears.

5 Click the field(s) you want to add and click **Add**.

6 Click **Close**.

The new fields and their correspond-

Figure 5. Edit and Tag mode pull-down.

ing columns of data appear at the far right of the list. Move them as needed.

Editing vs. Tagging

The default mode for List View is Edit mode. To verify the mode you're working in, look to the upper-left corner of the window — not the entire screen but the window — and you should see the words **Edit mode**. There's a pull-down that you can access to switch to Tag mode (see **Figure 5**). For the moment, stay in Edit mode.

Click on any piece of data in one of the columns. When you do, you can see that you have the ability to make changes to that data. If you make a change, it's made permanent when you click to another field or record, exactly like editing in the Contact view. The practical aspect of this is being able to see a lookup of records and go down the list and change multiple records very quickly.

Tag mode

Tag mode is exactly what it indicates: You can view a list and tag or un-tag as you please to create a lookup. I use Tag mode to create groups when the contacts have no easy way to be grouped using a lookup. A prime example is using a group in concert with the Id/Status field. Suppose that all your customers are identified as such in the Id/Status field and you want to further categorize those same customers by types of product they purchase. You've already created three groups: Hot Dogs, Hamburgers, and Sushi. Now you can use Tag mode to quickly add the records to the correct group.

1 Open the **Lookup** menu and select the **Id/Status** field.

2 Enter **Customer** as the matching item.

3 Click **OK** to execute the Lookup.

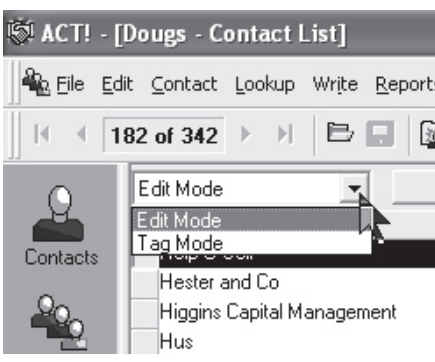**4** Switch to List View by pressing

Creating a Paperless Office with ACT! and DocAdmin

Victoria Marechal
ACT! Certified Consultant, Los Angeles, CA

Environmentalists and efficiency experts have long dreamed of creating a paperless office since computers sprung up on our desks. With the advent of ACT! 2005, one of the newest add-ons, DocAdmin by ASDS, delivers on the promise. It's astonishingly easy to use and practical in every sense of the word.

The United States has enjoyed a productivity growth averaging over 2.6 percent per year for the past 10 years and an astonishing 4.5 percent in 2003. Because productivity gains are a major contributory factor to economic growth, it stands to reason that if companies utilize means to improve productivity, they can enjoy bottom line benefits too. You might be surprised how much of a benefit this can mean to your organization.

Let's examine a small company, with enough paperwork to have a full-time file clerk. Yearly the cost runs somewhere between $15,000 and $30,000. Annual costs of paper, copier equipment, and storage space for the filing cabinets can easily double that number. But by far the highest cost of document handling is attributable to administrators and executives, easily consuming 20-30 percent of each work day. Even for small businesses, costs can escalate to tens of thousands and even hundreds of thousands of dollars.

However, the single most compelling and best savings from using a paperless solution is the elimination of an intangible cost: stress. The inability to locate an important paper document is a huge expense in so many ways. For instance, suppose an important client calls and wants to renew their contract, but you can't find the original. He's ready to go but you can't move forward. You ponder, maybe it's sitting on a colleague's desk, or worse yet, misfiled. The worst-case scenario is that you lose a good client by stalling, looking unprofessional. Wherever that document is hiding, it will require someone's time to physically hunt it down. The potential savings of universal document access are incalculable.

Yet many mid- and small-sized businesses haven't embraced this technology, even though it's been available for more than 10 years. The companies that would gain the most, as labor costs are still are a major percentage of expenses for most businesses, are the paper-intensive organizations — for example, insurance, financial services, public relations, legal, consulting, and real estate. Moreover, it's not just documents, which can be scanned. Any photo or graphic can also be stored.

The real reason most enterprises haven't set up a paperless office has to do with a fear of a nebulous system of document retrieval. By combining a scanning solution with a CRM (Contact Relationship Management) database, DocAdmin makes the job easy. It's a clean and simple solution to take important documents like signed contracts, customized proposals, and the ubiquitous CYA (in polite terms, cover your rear) memos and turn them into PDFs (portable document files), made ubiquitous by Adobe. But how do you know that it's the correct document and not an earlier draft? Easy — it is stored within ACT! under the Document tab under the contact record as a shortcut with a date stamp.

Like with any technological improvement, there are costs. However, you'll be surprised that both the hardware and the software are available at a shockingly low price. You'll need a scanner. Perhaps your office already has one — either an "all in one" printer or perhaps a stand-alone copier capable of scanning. Or you can pick one up for less that $100. The cost of DocAdmin is $149.00 per workstation license. Adobe Reader is ubiquitous and free. What are you waiting for?

Training is minimal. Actually, this application can probably be set up and used by a fifth grader (okay, I confess; I haven't actually brought in an 11-year-old to confirm this statement). Truly, beginners should find it a no-brainer. System administrators will like the feature of document storage in a central location under the Supplements folder nested neatly underneath the Database folder. And with synchronization, these documents can be transferred to remote users (but only if they're located within the supplemental file system of ACT!). DocAdmin is only compatible with ACT! 2005 (both versions), not with earlier releases. If you're still using an older version of ACT! (4.0 to 6.0), you may

want to check out the earlier incarnation: ACTScan by ASDS Computer (**www.asdscomputer.com**).

If one must keep documents for forensic or audit purposes, a digital copy may be acceptable by the court. In these cases, you'll want to check with your legal department, accounting advisor, or rules of evidence section of the state and/or federal code. In any event, original paper documents can be archived early while a PDF can be readily available digitally.

Installing DocAdmin is quick. Once this has been done, open ACT! and notice the addition of two icons representing scanners at the end of the taskbar. One icon has a black shadow, which will allow you to use all of the scanning and saving options. The other icon is plain except for the digit 1; this is used for one touch scanning (see **Figure 1**).
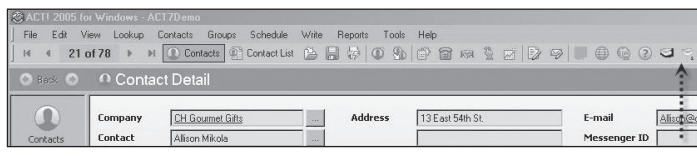
array of naming opportunities, you can select under **PDF Preferences** the ability to assign an author's name to the PDF scanned output. And included in this area are checkmarks to prompt for the opportunity to establish both subject and title of the document. The more detail you include here, the easier it will be to look up and cross-reference the document.

Finally in Scanning Preferences the Scanner User Interface is checked by default. The other two settings Auto Negate and Auto Rotate Scanned Images are optional features.

This software is very well built. I accidentally closed ACT! with-

out first closing DocAdmin, but it took the hint and closed itself without hesitation.

The process has three basic steps: Scan, acquire, and then save the document as a PDF.

Testing a late-model Hewlett Packard stand-alone scanner needed a push — of
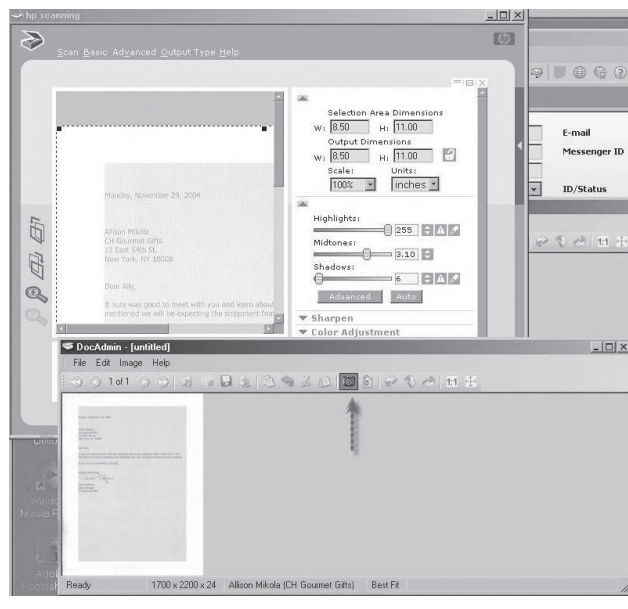
Figure 3. Acquire the image.

Figure 1. DocAdmin icons.

DocAdmin is used within ACT!. First, you'll want to land on the appropriate contact to which your scanned document will refer. Click on the **Full Scan** icon to invoke DocAdmin. Before you proceed to the scan, you might want to check out the **Preferences** under **Edit** (see **Figure 2**).

Under **General Preferences**, sizing the image offers two choices: Best Fit or a 1-to-1 ratio under Default Image Scale. The Auto Naming feature is available, but the default setting is none. Although it does offer the **Apply** button, it's not even necessary to confirm changes before moving to another screen.

To really take advantage of the wide

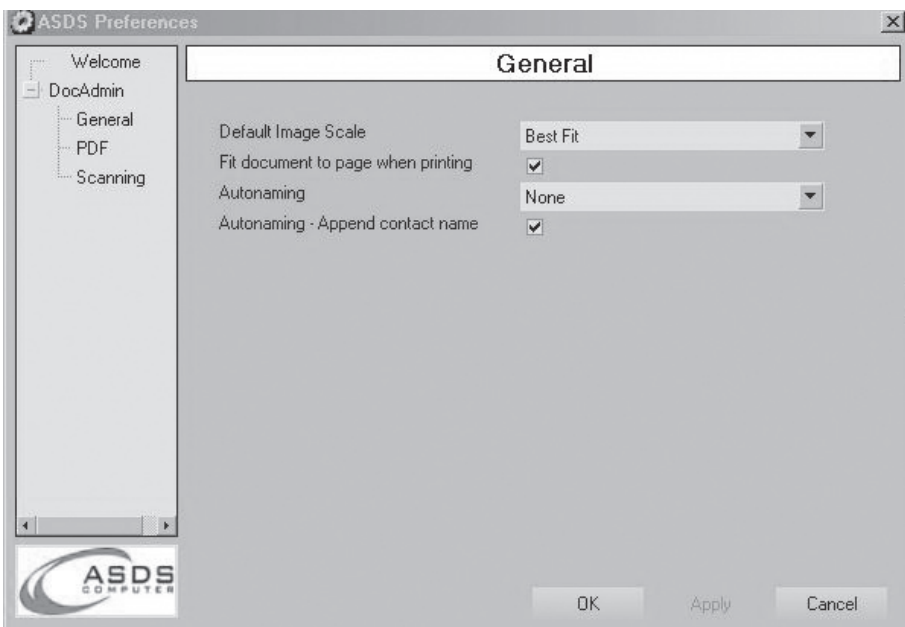**Figure 2**. DocAdmin Preferences.

Paperless Office...

a button. Once the HP captured the document, I clicked on **Acquire Document** (you get access it from either the icon or the dropdown menu). The document popped into the DocAdmin window exactly as expected (see **Figure 3**).

There are many options for editing the scanned image. Graphic artists will recognize these commands — too numerous to catalog here but certainly enough to avoid opening a memory-hogging visual application (see **Figure 4**).

The next step is to name it and save it. You choose where to save it; I recommend the shared Documents folder alongside your centralized folders. Automatically, in addition, it's destined for the Attachments folder beneath the Database folder. Since it's centrally stored, the documents are easy to back up, synchronize, and retrieve (see **Figure 5**).

The planning aspects of this are the only challenging part of the deployment. Remember to position yourself on the correct contact before scanning (see **Figure 6**). The most difficult part is deciding on a naming convention for your documents and being consistent. You may want to read an interesting discussion on this at **http://graphicdesign. about.com/od/organizingfiles/qt/ files1.htm**. If you spend time preparing a structure to your file-naming system and are rigorous in its application, you'll be well rewarded in time-savings. And once you've acquired several documents, you'll find the process extraordinarily easy.

The only question now is, will you be able to translate the cost and time-savings into a shorter work week? ◆

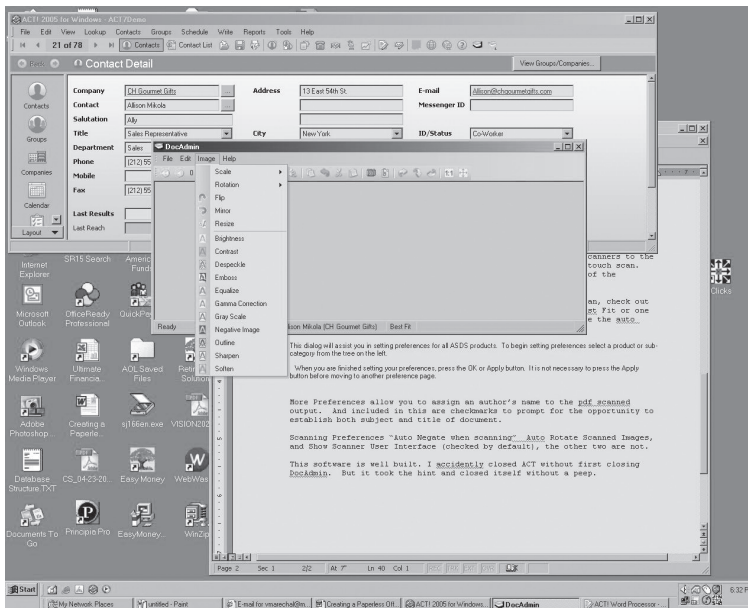*Victoria Marechal is an ACT! Certified Consultant*

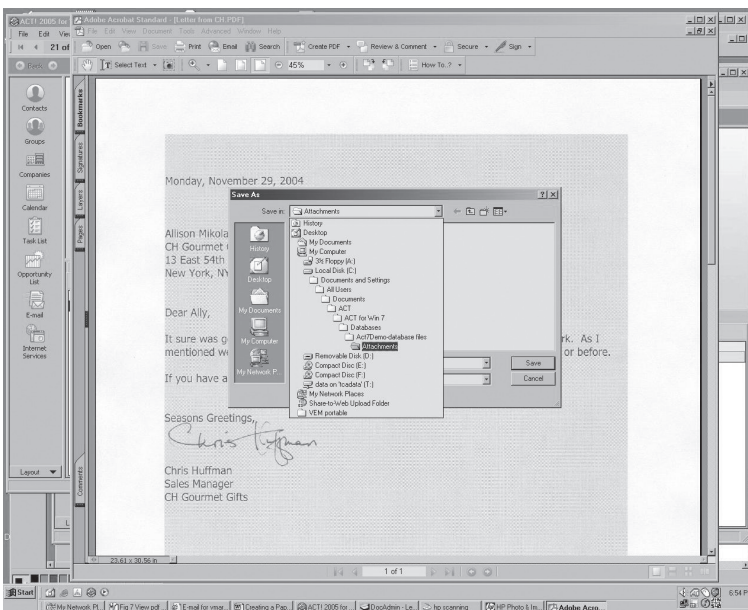**F i g u r e 4.** Image options.

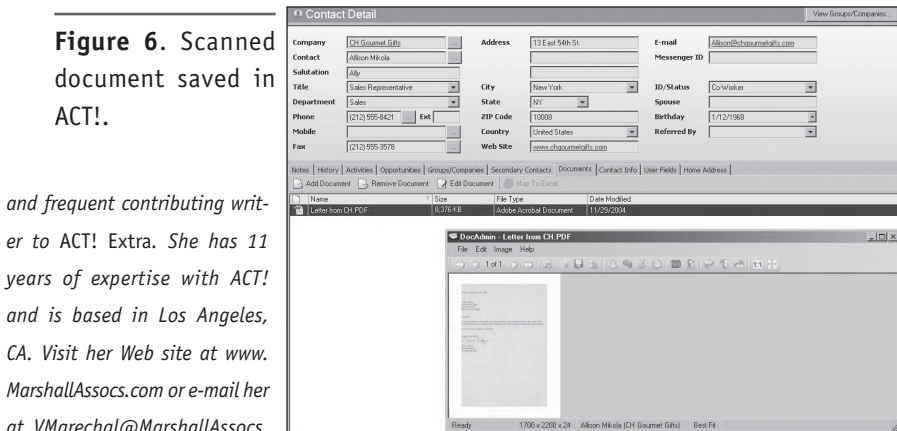**Figure 5.** A t t a c h - ment file location.

Figure 6. Scanned document saved in ACT!.

and frequent contributing writer to ACT! Extra. *She has 11 years of expertise with ACT! and is based in Los Angeles, CA. Visit her Web site at www. MarshallAssocs.com or e-mail her at VMarechal@MarshallAssocs. com.*

Outlook Express and ACT!

No single thing causes more confusion among my consulting clients than the difference between Outlook and Outlook Express. The confusion is partly the fault of Microsoft. Why they choose to name two products that do similar things with a nearly identical name is beyond me.

To clarify, Outlook Express is automatically installed when Microsoft's Internet Explorer Web browser is installed — which it is with Microsoft Windows. Outlook Express is an extremely easy-to-use e-mail program and therefore still the preferred software program for many ACT! users. It's also very fast in comparison to the ACT! e-mail program.

The 6.0 release of ACT! was expressly designed to work as seamlessly as possible with Outlook. Outlook is part of the Microsoft Office program and is designed to work well with the other components. You can easily e-mail a Word document, an Excel spreadsheet, or a PowerPoint presentation directly from the native program. In other words, instead of typing a document and then saving it as a file, opening an e-mail program, and then attaching the saved file, you can simply open the **File** menu, select **Send to**, and the file is on its way.

Despite the apparent advantages of using Outlook, Outlook Express is still used by many ACT! aficionados. In this article, I want to explore the connection between ACT! and Outlook Express and some of the problems that may bedevil
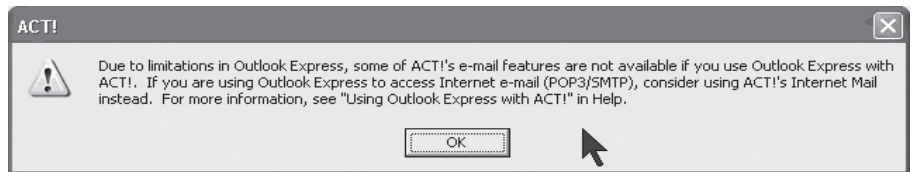

Figure 1. Warning on limitations.

you in trying to get the connection to work as you expect.

E-mail

Let's begin with a quick review of ACT! and e-mail. E-mail is sent and received by connecting to a computer that's run by your Internet Service Provider (ISP). ACT! has its own e-mail program, which goes by the name of Internet Mail, and many computers have other programs that can send and receive e-mail such as Outlook, Outlook Express, Eudora, or Lotus Notes.

No matter which program you use, they all connect to the computer that hosts your e-mail. In some cases, your company may be using Exchange Server, which acts as an in-house e-mail host computer, which in turn connects to outside computers to handle your e-mail traffic.

When you install ACT!, you're asked to

set up your e-mail. ACT! will search your system and display the e-mail programs it sees installed on your system. If you choose Internet Mail, you have to enter the SMTP and POP settings, among other things, in order to connect to your ISP.

Most ACT! users simply select either Outlook or Outlook Express as their e-mail program. When you select Outlook or Outlook Express, or any other program other than Internet Mail, you'll get a message saying that using one
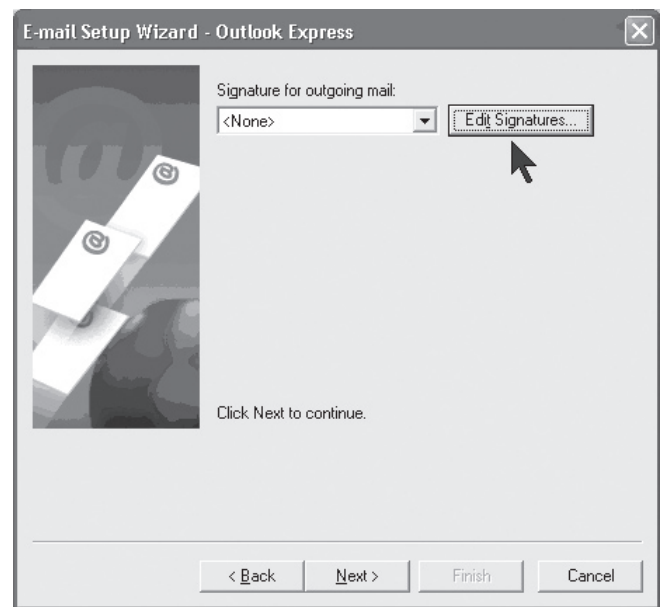
Figure 2. Option to create signatures.

Outlook Express...

of the other programs will have some formatting limitations (see **Figure 1**). What happens is that some graphics or other HTML attributes may be stripped from your messages. That's because of the method used by the various e-mail programs to process and send the message.

At that point, you can create signatures that become part of any e-mails you send when not starting from a contact record. That last sentence is another confusing aspect of e-mail. When you're looking at a contact record and click the **Write** menu and **Email** option, the default e-mail template is **emailbody.gmt**, and that must be edited separately from the ad-hoc signatures (see **Figure 2**).

No matter which e-mail program you choose, when using ACT! you're forced to work within the ACT! e-mail interface.

Note in **Figure 3** to the right of the From line that ACT! indicates that the message will be sent via Microsoft Outlook Express. That means that once you click **Send**, the e-mail file is sent to the Outlook Express outbox. If Outlook Express is open, the message is generally sent immediately to your ISP computer for delivery, unless you have the option in Outlook Express to not send immediately.

In previous issues of *ACT! Extra*, we've described how to set up your connection to Outlook making the ACT! address book available via Outlook. Outlook Express doesn't have those same options.

What you can do with ACT! connected to Outlook Express is:

◆ Use the Outlook Express outbox to send your ACT!-created e-mail messages.
◆ See and read messages in your Outlook Express inbox.
◆ Attach received messages in the inbox to ACT! contact records.
◆ Create new contacts from a message in the Outlook Express inbox.
◆ Create new activities from a message in the Outlook Express inbox.

All of those things are easy, once you get connected to the Outlook Express program. But as it turns out, sometimes getting connected is more difficult than anticipated.

After selecting Outlook Express as your preferred e-mail client, to see its implementation, open the **View** menu and select **Email**.

What you should see are the Outlook Express Inbox, Deleted Items, Drafts, Outbox, and Sent Items (see **Figure 4**).

Click the **Send and Receive** tool button at the top of the window, and any e-mails that are in your Outlook Express inbox should appear along with any new messages.

How Can I Back Up the Outlook Express Address Book?

Outlook Express version 6 uses the Windows Address Book (a .WAB file) to
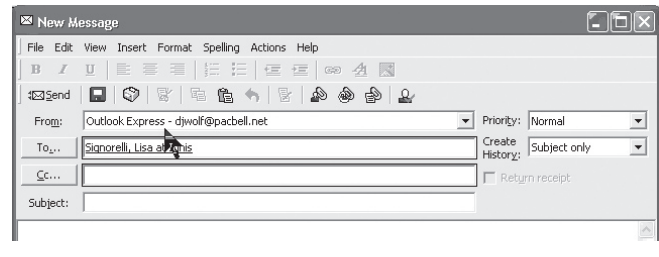
Figure 3. New e-mail message.

store address information. If there's more than one identity set up, the information for all identities is stored within the same .WAB file. If you want to save just the address book information for your identity, you can do so by exporting it to a file. See this site for instructions: **www.winxpnews.com/rd/rd.cfm?id=041116QC-Backup**.

The easiest way is to back up the entire .WAB file for all identities. Just copy it to an alternate location. Here's how:

1 In Outlook Express, click the **Address Book** button on the main toolbar or click **Tools | Address Book**.
2 In the *Address Book* window, click **Help | About Address Book** to see the full path to your .WAB file.
3 Navigate to the .WAB file in Windows Explorer.
4 Copy the .WAB file to your backup location.

To restore the data, in Outlook Express click **File | Import** and select the backup .WAB file to import. ◆
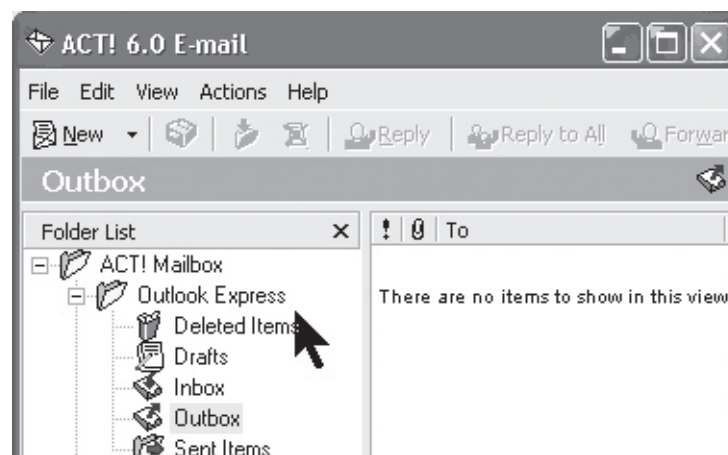
Figure 4. Outlook Express folders visible in ACT! e-mail.

Conveying Your Compelling Message

Neglecting to stay systematically in touch with your customers is one of the main reasons volume encounters peaks and valleys — it's also a major contributor to stress in the work place. The cycle to earn business is never-ending, as credibility is lost with the customer each time promises aren't delivered upon. Harvey McKay states, "If you can't keep the customers you have, creating new ones is a very expensive way to go out of business."

Investment into your customer relational system is about caring for the client as a person, not just as another sales opportunity. There's an honest desire to deliver what this individual or family needs currently and in the future. Sending a piece of material just to "stay in front" of the customer isn't enough — in fact, following are some outstanding statistics provided by Seth Godin in his book Permission Marketing.

Consumers receive 5-10 pieces of junk mail every day. In fact, there companies that spend 52 percent of their budget to market to strangers in the hopes of making a sale. What this equates to is:

- ◆ 1,000,000 marketing messages a year
- ◆ 3,000 marketing messages a day
- ◆ 100 marketing messages in every newspaper or magazines that's read
- ◆ 40 messages in an hour of television

So when your client receives a letter or an e-mail from you, the critical question becomes: Why should they listen to you?

If your message isn't compelling, if it's not relevant, if it's not anticipated, the consumer won't hear what you have to say.

Keeping a database intact isn't just about keeping names, addresses, and phone numbers, but rather a retention net that allows you to collect information that's pertinent to that consumer — hear what your customer vocalizes, by keeping track of your conversations in the Notes/History tab of the database. The ability to furnish information that's anticipated, personal, and relevant in nature will be directly related to the accuracy with which the data is recorded. As a result, what you send has meaning and won't be discarded into the nearest trash receptacle. In fact, if the messages you send meet these criteria, 70 percent will be read and 35 percent will be acted upon. Quite a different result than most marketing campaigns that are considered successful with a 1-2 percent result.

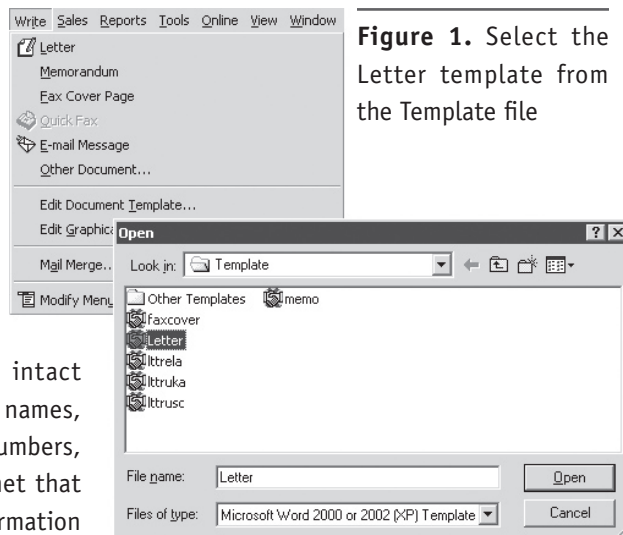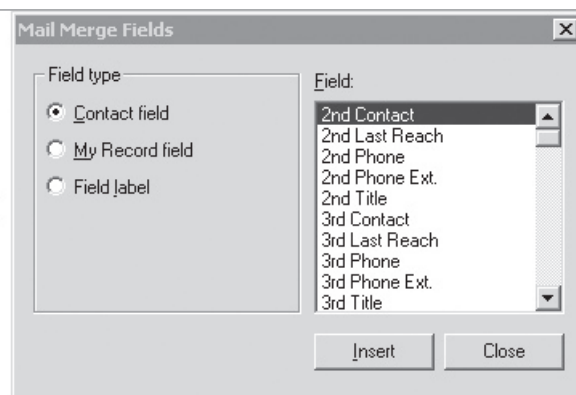**Figure 1.** Select the Letter template from the Template file

Figure 2. Type the messgae you want to convey in the letter template

Compelling Message...
Continued from page 11

Creating the Letter Template

The good news is that this process may still be automated by producing custom letter and e-mail templates that meet the criteria above. To create a letter template, follow these steps:

1 From the menu bar, select **Write**.
2 From the dropdown list, select **Edit Document Template**.
3 Select the **Letter** template. (See **Figure 1**)
4 Type the message you want to convey in the letter template. (See **Figure 2**)
5 From the menu bar, select **File** and then choose **Save As**. (See **Figure 3**)
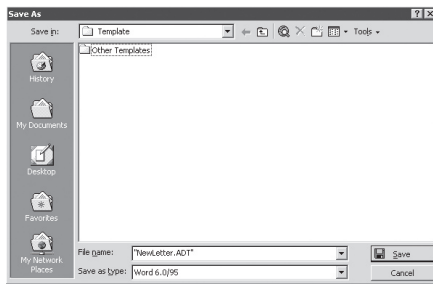6 Name the document by following these steps:
   ◆ Quotation mark

Figure 3. From the menu bar, select **File** and then choose **Save As**

   ◆ Name of document; we used NewLetter
   ◆ Period
   ◆ ADT
   ◆ Quotation mark

Creating the E-mail Template

To create your custom e-mail template, follow similar steps:

1 From the menu bar, select **Write**.
2 From the dropdown list, select **Edit Graphical (HTML) E-mail Template**.
3 Select the **emailbody** template. (See **Figure 4**)
4 Type the message you want to convey in the e-mail template. (See **Figure 5**)
5 From the menu bar, select **File** and then choose **Save As**. (see **Figure 6**)
6 Name the document by following these steps:
   ◆ Quotation mark
   ◆ Name of document
   ◆ Period
   ◆ GMT
   ◆ Quotation mark
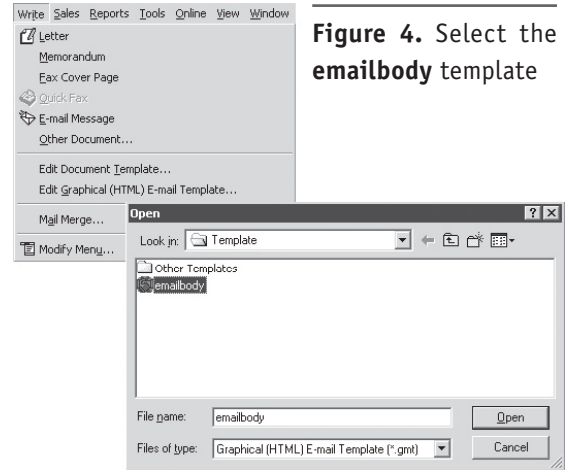

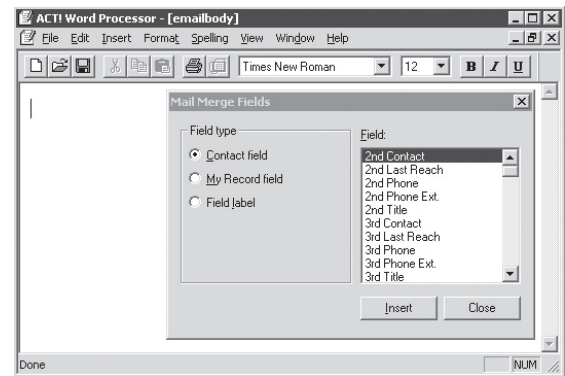**Figure 4.** Select the **emailbody** template

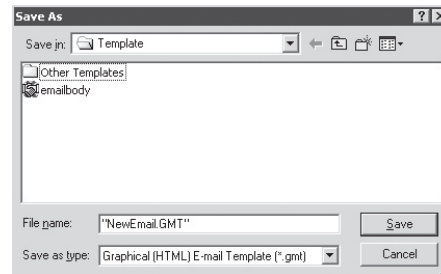**Figure 5.** Type the message you want to convey in the e-mail template.

Figure 6. From the menu bar, select **File** and then choose **Save As**.

Contact List View...
Continued from page 5

F8. You may wish to move the Id/Status header next to the Contact or Company.

5 Make sure you're in Tag mode.
6 Click on each of the records that belong in the Hot Dogs group. A plus sign precedes each of the selected records.

7 Click the **Lookup tagged** button.
8 Click the **Groups button** in the **View** bar.
9 Select the **Hot Dogs** group.
10 Open the **Group** menu and select **Group Membership**.
11 Select **Add/Remove Contacts**.
12 In the dialog box that appears, select the **Current Lookup** radio button.
13 Click **Add All** to add the tagged records to the Hot Dog group.
14 Click **OK**.

The records that were tagged are now part of the Hot Dog group. To add the other customer records to the appropriate group, use the **Lookup** menu and repeat the Id/Status lookup, and then tag the records to belong to the Hamburger group, and then repeat the steps for the Sushi group. ◆