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This article applies to version(s):

ACT! 2005 or later

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ACT! 6.0 or earlier

What's Up with ACTivities in 2005?

This article applies to version(s):

ACT! 2005 or later

Victoria Marechal
ACT! Certified Consultant, Los Angeles, CA

Ever lost an important opportunity by not following up? If so this article is aimed directly at you. Amped up ACT! 2005 allows you to ramp up your abilities. Read more to turn yourself from a manager into a leader.

It is important to reinforce - Activity leads to productivity. Therefore your success depends upon taking action.

Successful team activities will build camaraderie. Collaboration tools in the new ACT! 2005 facilitates teamwork. This is an excellent reason to upgrade. Let's examine exactly how we can implement this strategy to bring you great productivity and big morale boosts too. Even if you have not moved forward with the latest version, you can still put these basic concepts into play with the earlier versions of ACT!.

In this article we will go through the reasons to use these tools and the steps to set them up. We will make a new type of activity, create a series of activities and distribute them among your team.

Plus, we will look at the newest team centric improvements such as checking team-member availability, sending meeting invitations and scheduling resources, such as conference rooms, as well as how to set up events, all within the modernized ACT 2005.

Activity Type is a Fun Set Up

Earlier releases had just three types of activities. If it wasn't a Call, Meeting, or To Do, it just didn't happen. Three new activity types in 2005 included by default are Personal Activity, Support Ticket, and Vacation. Better still, you can now add and customize activity types. You might want to add an activity type called Research, Prep Bid, Billable
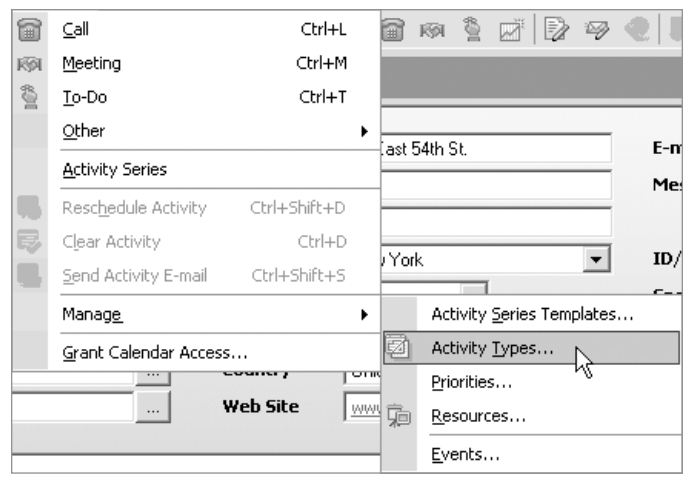
Figure 1. Schedule | Manage | Activity Types

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Time, or Project Planning.

Creating new types of activities are a delight because you can select an icon to represent the activity. If you are wondering where to find icons, they are all over. Your CPU probably has more than 200 (just look for the file name extension ICO). On the internet there are packages with icons, many containing hundreds. Check out low cost software specializing in icon creation or create your own icons from any graphic image with screen capture programs. **Figure 1** shows the Activity types dialog.

Of all of the activities I do, traveling is the one that gets slighted on my calendar. The considerable amount of time (drive, go to the airport, fly, rent a car, check into hotel, etc) is not always re-billable to clients. Yet it is important for me to block out sufficient time which is completely separate from a client's appointment. So let's create an activity type called Travel. To get started, go to the top menu, click **Schedule | Manage | Activity Types**. (**Figure 2**)

Click on **Add**. Type in the name for our new activity: Travel. Click on **Browse** to locate the icon to utilize for this activity type. After you have found the icon, click on **Open** to attach the icon to the activity. (**Figure 3**)

Keep in mind that once you have created a new activity type there is no way to remove it. But you can deactivate it by unchecking the box "Active" and

clicking on OK. You can not edit the three basic Activity Types: Call, Meeting, or To Do.

Set the Result Type, which is used when you clear an activity, by selecting the check box alongside either Not Completed or Completed. The statement just above "The results for clearing an activity must include a completed value and a not completed value" really indicates you can use only one checkmark to show by default what happens to that particular activity type when you clear it.

You can also add a Results Type. For instance, if there was another word you wanted to use to show completion status, you could use a word like Mailed,
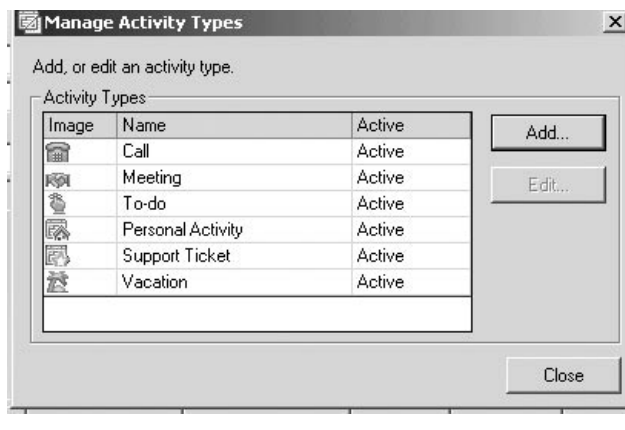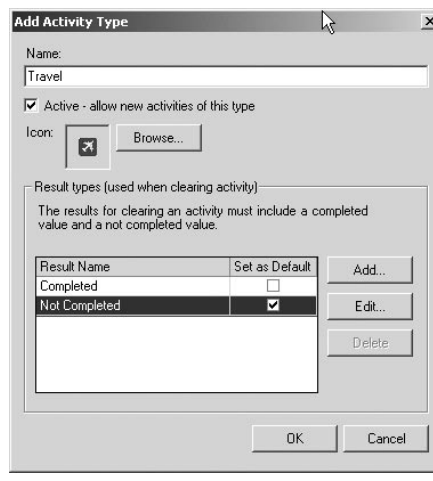

Figure 2. Make a new type of activity

Figure 3. Add an Activity Type - Travel

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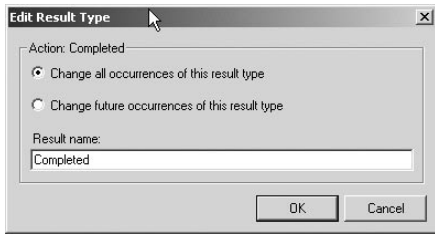
Figure 4. Edit Result Type

Sent, Faxed, Cancelled, or Postponed. (**Figure 4**)

If you Edit a Results Name, this allows you to "Change all occurrences" or just "Change future instances" of this results type.

Click on OK to finish.

Activity Series

Any set of tasks which are recurring are ideal to set up as an activity series. For some organizations, Activities Series are vital. If you have to follow up on a long range goal or work on an agenda which is strictly sequential, scheduling an activity series will save you time and insure you don't miss a trick. This tool is particularly valuable for those working on high dollar value sales like working with prospective commercial tenants or selling Gulfstream jets. Service professionals, especially legal and accounting have strict scheduling requirements. Miss a tax deadline or exceed the statute of limitations, the client suffers major consequences, and everyone involved loses.

Creating Mulit-user Activity Series

The new benefit within the activity series in ACT! 2005 is the ability to set up a multi-user activity series to distribute specific tasks among your team. Now you can define a series of activities around an anchor date so these activities will remain linked. When one activity

moves, you are prompted to move the other ones.

For instance, let's say we work in an advertising agency. You need to roll out a new product campaign within 2 weeks. We need to gather creative types, the graphic artist, the copywriter, the photographer, and the media buyer to coordinate this project. You want your administrative assistant to check the availability of each team member and e-mail an invitation to each for a planning meeting.

To set up a multi-user Activity Series we begin from the top menu **Schedule | Manage | Activity Series Templates.** The Activity Series Template Creation Wizard opens to Create a new activity series..(**Figure 5**)

You must add a Name and optionally Describe the new Activity Series - *New Product Campaign*. (**Figure 6**) **Click next**. Click the **Add** box to select an activity type (**Figure 7**). Enter the appropriate *Add Activity* options:

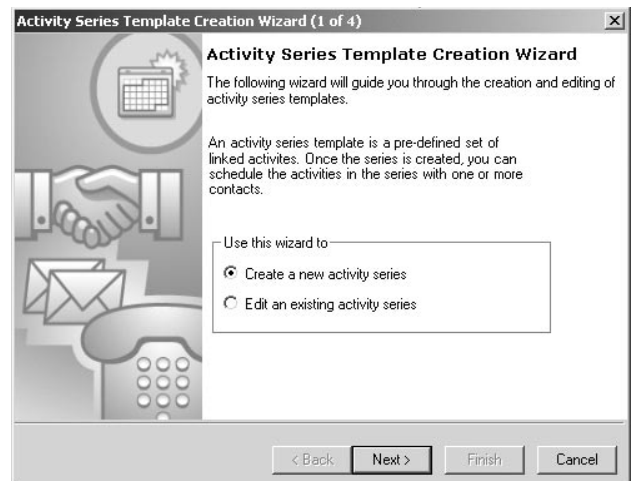◆ Activity Type: Select an activity type from the drop-down.

Figure 5. Activity Series Template Creation Wizard

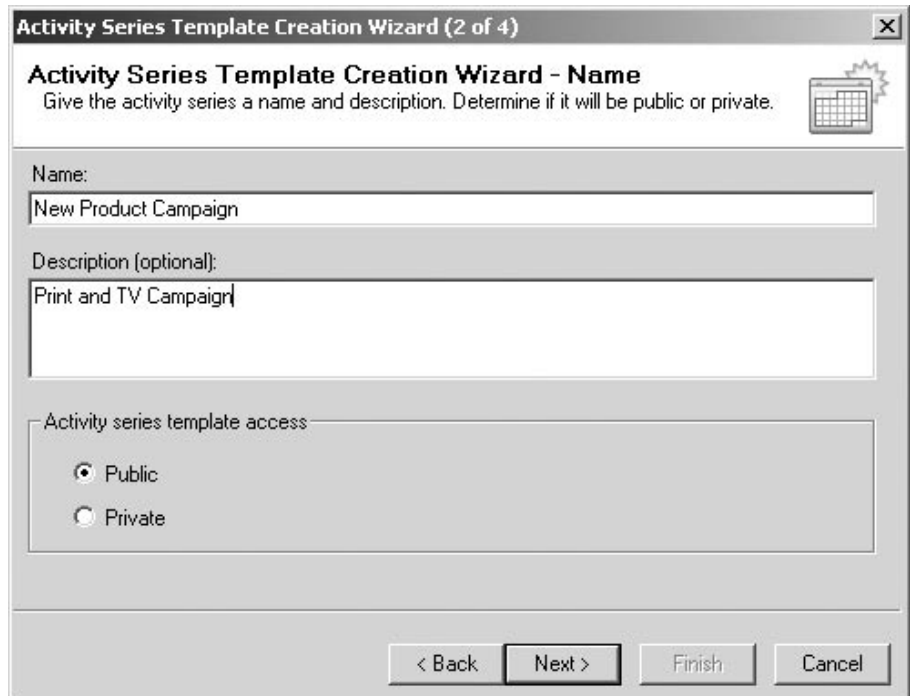**Figure 6**. Name and describe new Activity Series

ACTivities in 2005...

◆ Starts: Number of Days after or preceding the anchor date.

◆ Anchor Date: The anchor date is the base point from which all activities in the series are scheduled. It can be either from the start of the series or days before the deadline date.

◆ Duration: Use the arrow to the right of the field, click to select a duration, or type in a duration.

◆ Regarding: Type a description of the activity or select a description from the drop-down.

◆ Priority: Select a priority level from the drop-down.

◆ Color: Click the arrow to the right of the field to display a color palette. Click the color that best suits the priority of this activity.

◆ Ring Alarm: Type a lead time for the alarm, or select a time from the drop-down.

◆ If activity falls on a weekend: Click on the box to change schedule of activity on a weekend to the following Monday.

◆ Schedule For: This area will allow the organizer to schedule other users for the activity series.

◆ User scheduling the activity series: Select to identify the user scheduling the activity as the organizer.

◆ Schedule For: This will allow you to select another user on your team to be responsible and accomplish this task. (see **Figure 8**)

(**Figure 9**) Click **OK**, this will bring you back to the Activity Series Creation Wizard with your Activity Series settings displayed. Continue **Add** Activities until you have assembled all of the activities. Click **Next** to select the option to either schedule the Activity Series now or later.
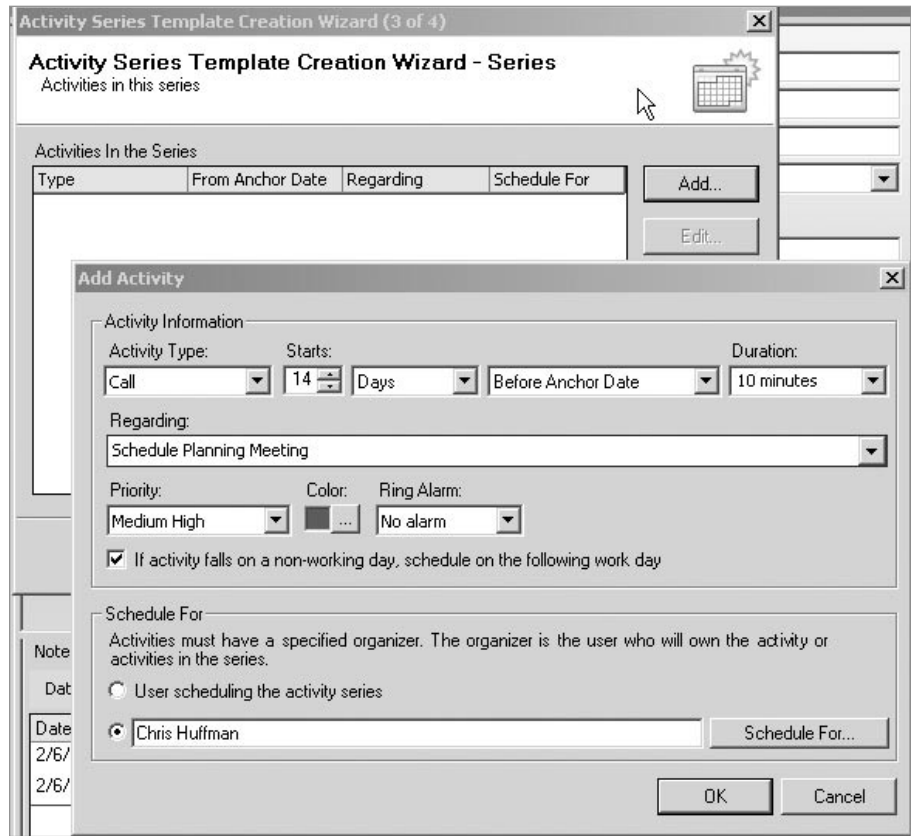
Figure 7. Add an Activity
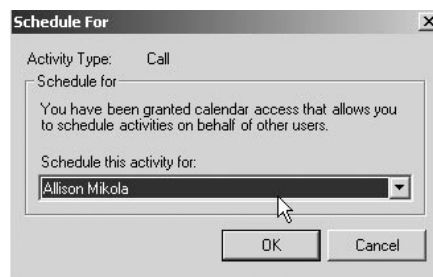
Figure 8. Schedule Activity for another user
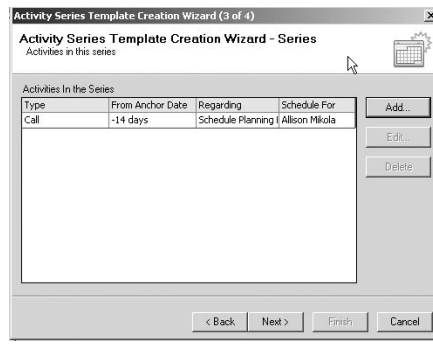
Figure 9. Activities in the Series

Click **Finish** to complete the task.

Send Meeting Invitations by E-mail

To initiate an e-mail regarding an activity just right click on it on your calendar. This allows you to communicate with the contact. Or use the Shortcut Ctrl+Shift+S. An e-mail will pop up which will include all of the scheduled activity particulars, date, time, regarding. It will also attach the ACT! activity to the e-mail (see **Figure 10**).

Set up Global Events

Global Events are available in all flavors of ACT! 2005. It is a great way to schedule company wide occasions like holidays and company wide events. You can also set up birthdays. All users will be able to see the events on their calendar. Go to **Schedule | Manage |**

Events to set up Global Events.

Enhancements in ACT! 2005 Premium for Workgroups: Checking Team Availability, Handling Invitations, Managing Resources

With ACT! 2005 Premium for Workgroups there are special features which allow teams to coordinate their schedules

Checking Team Availability

When you schedule for someone else you can check their availability. Notice the dotted arrow pointing to the tab. Click on that tab to see the user's schedule (see **Figure 11**).

Handling Invitations

When you schedule an activity for ACT! 2005 Premium in Workgroups for another user, an invitation to attend the activity is sent to that user and the activity is placed on that user's calendar. A notification shows up on their status bar. Users can accept or decline these invitations. This ensures that no one puts an activity on your calendar unless you have knowledge.

The user is notified of the invitation by a pop-up window in the lower right corner (see **Figure 12**).

To open and respond to an invitation, click the invitation icon or pop up window. A list of pending invitations will appear. Respond to an invitation by clicking on it and selecting the appropriate button; either Accept, Tentative, or Decline. Those ACT people really know how to get us to RSVP.

Manage Your Resources Effectively

ACT! Premium allows a user to schedule resources, such as conference rooms and equipment. A resource can be a place or
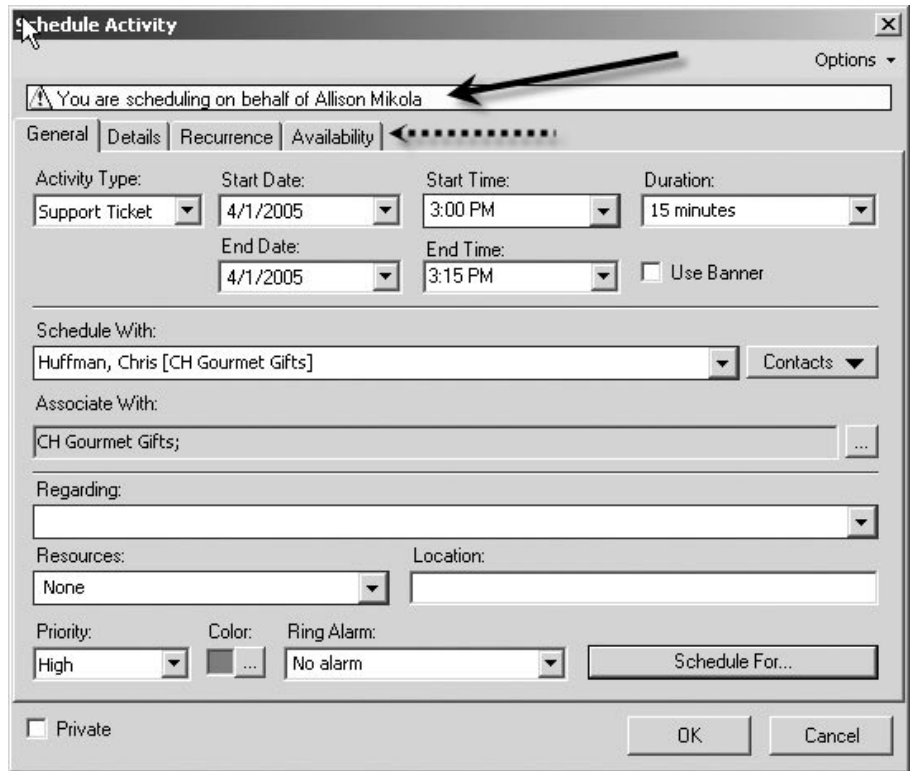
Figure 10. Send an e-mail regarding an activity

Figure 11. Schedule For

a thing. You can view a calendar to see whether the resource is available. Start by defining resources such as conference rooms and A/V equipment. Resources can also be identified by location so they will be pre-filled when you schedule them. Keep in mind the resources only show on the main database and are not accessible to remote uses, although they are viewable remotely. Start the

set up by selecting **Schedule | Manage | Resources.** After you have set up the resources, they will be available to select whenever you schedule an activity.

There are many other worlds to explore inside ACT! 2005 and beyond. Learn more about the potential time savers with software and liberate yourself

Getting the 411 on ACT!'s new Company Feature

Karen Fredricks, Tech Benders, LLC, Author, ACT! 6 for Dummies, ACT! Certified Consultant, ACT! Premier Trainer

The company portion of ACT!, new in version 2005, is a feature that not all of you are going to take advantage of. However, those of you who are working with larger companies and organizations will find this feature invaluable. You might want to think of a company as a mini "database within a database."

There are a lot of similarities between the contact and company portions of ACT!; most of the concepts that you've learned about contacts can be applied to companies as well. For example:

◆ You can add your own unique company fields and associated drop-down lists

◆ Companies come with a variety of modifiable layouts

◆ ACT! provides you with a whole series of tabs so that you can add company specific documents, notes, activities, and opportunities

◆ ACT! provides you with various customizable company specific reports

◆ You can view, modify and print a list of all your companies

◆ You can create Lookups based on any of your company fields

◆ You can create a mail merge to a specific company

You can view your contacts either individually through the Contact Detail window or as a whole in the Contact List. The same holds true for companies:

◆ The Company Detail Window lets you see all the information that relates to a single company as you can see in **Figure 1.**

◆ The Company List allows you to view all the companies that you've created as seen in **Figure 2.**

Out of the box ACT! includes a Company icon on the navigation bar running down the left hand side of the ACT! program. Clicking the Company icon takes you to the Company Detail window of the first of your companies as it appear alphabetically. Once there, you have to click the Company List icon that now appears in the toolbar which will take you to the Company List. In the Company List, you can find the name of the company you'd like to view and double-click it. Once there you might want to sit down and rest for a minute or two. Personally, I find that to be way too much of an effort. My solution is to right-click on the navigation bar, choose "customize" from the window that pops up, and drag the Company List
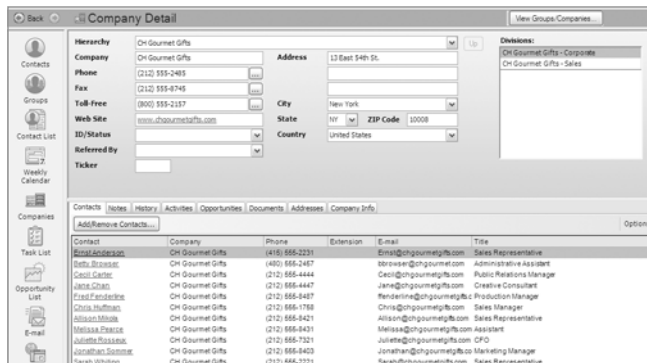
Figure 1.

icon on to the navigation bar. From now on a simple click of the Company List icon will allow you to bypass several unnecessary steps. **Figure 3** shows you how easy it is to add the Company List icon to ACT!'s navigation bar.

When most of you created a company in real life you had to hire an attorney and sign a bunch of papers. In ACT! the procedure is a bit simpler, thank heavens! You can add a new company from either the Company List or Company
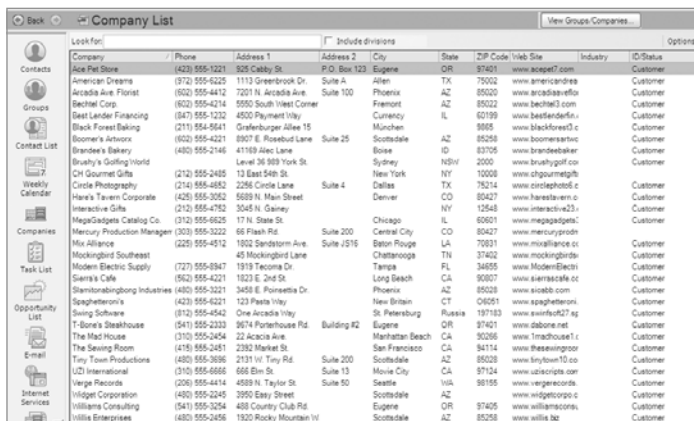
Figure 2.

Detail views; however, adding it from the Company List gives you the advantage of seeing all the companies that you've already created.

1. Navigate to the company list.
2. Right-click the company list and choose "New Company."
3. A new, blank Company Detail window appears. Fill all the necessary information into the various company fields.

You might find yourself dealing with companies that vary in size from the sole proprietor who runs his business from his backyard tree house to the Fortune 500 companies with locations all around North America - or the world for that matter. You might even find yourself working with a really super-sized corporation like the federal government. ACT! will allow you to create 15 levels of divisions so that you can have divisions of your divisions of your divisions. Sound confusing? It is, but then so is the structure of many mega corporations.

To create a new division, sub-division, sub sub-division or whatever, follow these steps:

1. Display the Company List.
2. Right-click the company for which you'd like to add a sub-division and choose New Division. **Figure 4** shows you an example of the new window that appears when you right-click the Company List.
3. Enter the pertinent info for the division into the blank Company Detail window that magically appears.

The Company Detail window is probably your best source for navigating through the corporate maze. If you are looking at the main company window, you'll notice all the divisions listed in the Divisions field along the right-side. For example, Figure 1 shows you that the CH Gourmet Gifts company has

both corporate and sales sub-divisions. If you want to hone in on a division just double-click the division name; you'll notice the company name and path now appears in the hierarchy field and additional sub-divisions appear in the Divisions field. You can keep drilling down through the divisions until you reach the final sub-division or oil - whichever comes first. **Figure 5** illustrates the fact that we are now in the "corporate" sub-division; clicking the "Up" button will land you back at the primary corporate level.

I almost hesitate to tell you this one but it's very easy to delete a company. The good news is that even if you delete a company, the contacts
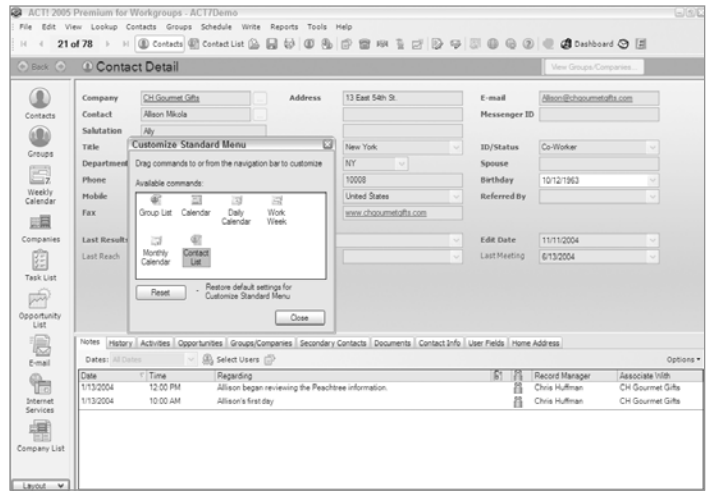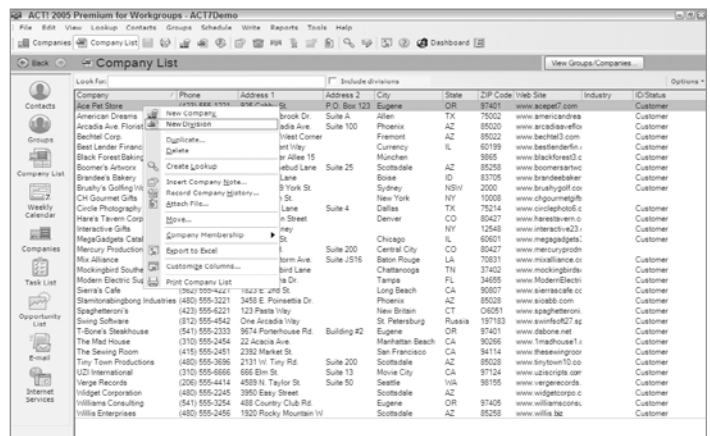
Figure 3.

Figure 4.

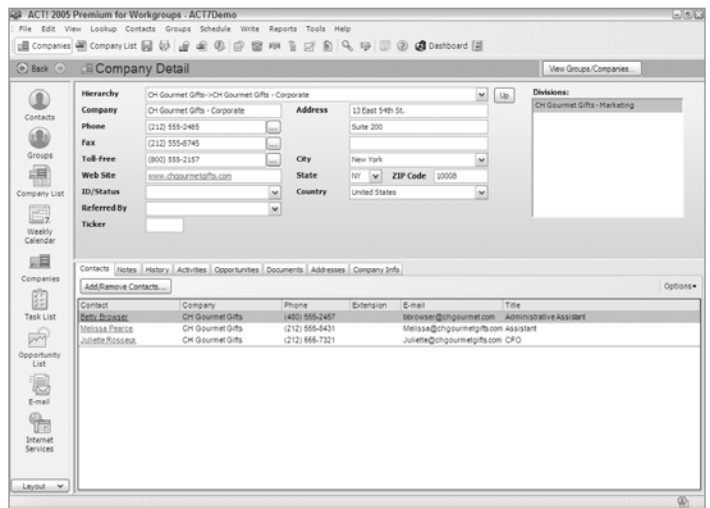**Figure 5.**

Getting The 411...

associated with the company are still alive and well and living in your database. The bad news is that all the information from the company fields is lost forever - unless, of course, you have a backup!

1. Highlight the company from the Company List.

2. Right-click and select Delete Company.

3. Click Yes to confirm that you want to delete the selected company.

You might already be an ACT! fanatic and have recently converted from ACT! 6 to ACT! 2005. ACT! 6 users had to be content with groups because the concept of companies was non-existent at that time. You might have set up a group which in actuality was a company. New users in the crowd might set up a group from time to time and find that the group miraculously transformed itself into a full-scale company. By now you know that ACT! thinks of everything and this is just one more instance of that. You can easily convert a group into a company at the click (or two) of a button by following these directions:

1. From any ACT! screen click View@@--->Group List

2. From the Group List, right-click the group name that you'd like to transform into a company.

3. Select Convert to Company.

4. Continue clicking Next until you arrive at the last screen; click Finish.

If you'd like I can try to make these instructions a bit more difficult. Basically the wizard is confirming that yes, you want to convert the group into a company. By default, the group name will become the name of the newly created company, the group address will now be the company address and so on.
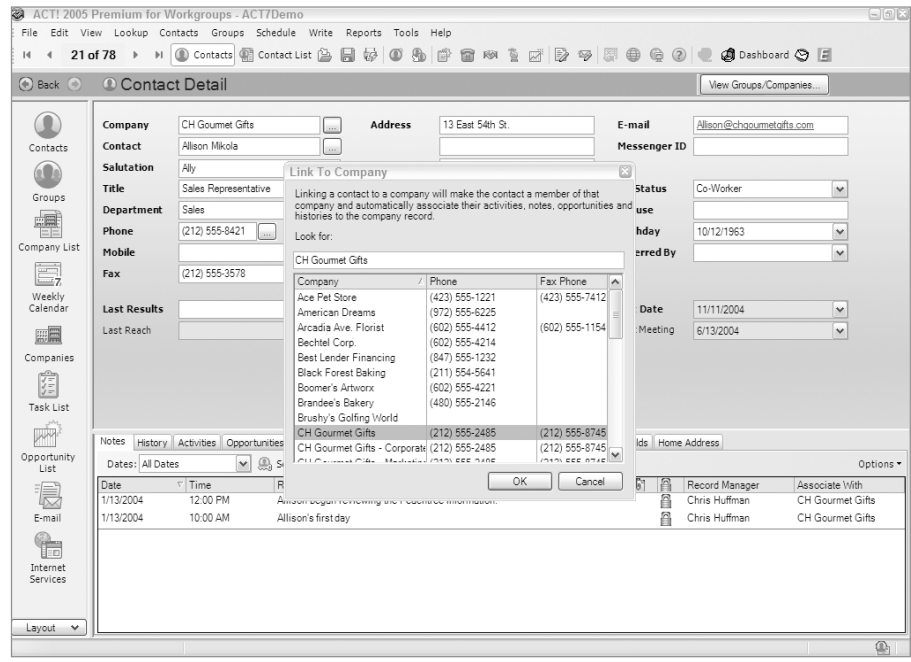

Figure 6.

Feel free to muddle in there if you'd like but don't blame me if your muddling efforts are successful!

Once the conversion is complete you might want to race over to the Company List to have a look at the company you just worked so hard to create! You'll also notice that the original group has disappeared - or at least been replaced by the new company.

Once you've created your companies you'll want to link each of your contacts to a company. Linking a contact to a company will create a hyperlink from the contact to the corresponding Company Detail window. Once you arrive in the Company Detail window you can click the contacts tab to view all the other members of company. There are two important concepts to remember before linking a contact to a company:

◆ A contact can only be linked to one company.

◆ Linking a contact to a company is the only way to create a hyperlink from the contact to the corresponding

company.

To create the link between the individual contact and the company follow these steps:

1. Click the browse button which is next to the Company field on the Contact Detail window. The browse button is identified by the three little dots or "ellipsis". The Link to Company dialog box appears.

2. Select the company to which you would like to link the contact and click OK. If the company name in the Company List matches the company name in the Contact Detail window, the name will be automatically highlighted as shown in **Figure 6**.

The company name will now appear in blue, indicating that a hyperlink has been created between the contact and the company.

If you find that you no longer want the link, simply click the browse button again and ACT! will ask you if you want to disable the link. Click OK and the link

"Ask The Pro"
Q&A with an ACT! Pro

THIS MONTH:
Victoria Marechal
ACT! Certified Consultant, Los Angeles, CA

In this issue we cover how to use ACT to increase sales and how to perform calculations within fields. We also respond to a query about slow going with ACT! 2005 as well as the most evolved PDA/Phones and Links for Palm and Pocket PC.

These concerns cover several versions of ACT!. Since we realize some of our subscribers are more comfortable with earlier versions, we endeavour to publish a balanced selection of questions. As an ACT! Certified Consultant I must stay on the cutting edge, yet I recognize our audience is made up of all types of ACT! users. Therefore, in response to your concerns, we invite you to send e-mail regarding your issues with any version. Keep in mind when you do ask, let us know which version you are using. Although we would like, I'm sure you understand we can not reply to all queries individually.

Q I'm a new sales director for a national organization. I manage a team of 20 salespeople around the country. Although the company has been using ACT for a while, I'm new to it. Each salesman's territory has been set up as a Group and we synchronize daily, all which is working fine. But other than I don't know anything about ACT! I don't want to look like a novice to my salesmen. What should I do with ACT? Moreover, can you suggest ways for us to improve our sales?

Anonymous via e-mail

A Congratulations on your new position. We have five practical suggestions on how to use ACT effectively within a sales environment. If you use these tips we believe you will get tangible productive, lucrative results. Since your team is already using ACT you can get up to speed within a few days using the collective knowledge in your database. Just think, a few years ago, your acclimation would take months.

Training

The first step is for you to get up to speed with a little hands-on, one on one instruction. An ACT Premiere Trainer specializing in executive needs can either come to your office or set up a virtual training via a web link. Expert guidance tailored to your needs will give you the leap forward.

Insist on Good Data

Get an overview of the scope of your data. If you need to, clean up the data. Make sure each client and prospect has a designated salesperson listed as the Record Manager not the secretary that entered the contact. Assign leads immediately to a sales associate. If you are using ACT 2005, set up Teams.

Use ID/Status field consistently and wisely by narrowing the definitions to a short droop down list of primary roles like Customer, Prospect, Suspect, Vendor, Staff and so forth. The ID/Status is the basic identifier of your contact's primary relationship and is the pivotal base of the database. If a contact has dual roles, use only one designation for ID/Status, the primary one. With this you can, with one lookup, get an overview, perform many tasks, and get comprehensive reports.

Listen to your Prospect or Customer and Record It

You already know the basics: Your clients will tell you what they need. All you need to do is just, listen. The important goal is to take notes from what you hear. Consider customizing ACT to capture this information in a consistent, therefore, meaningful way. Once you coalesce this data, you will find these statistics very valuable. Use this data to design your products or services around their demand.

Keep Your Sales Focused and Follow Up

Customize the Opportunities to conform to your sales cycle and include all of your products. Following up with contacts isn't an accidental occurrence. Read my article in this issue about activity series which will assist you to schedule routine, recurring, and sequential tasks. Keep in mind cross selling ancillary products to your existing customers is

a very effective technique to increase sales especially because the sales cycle is usually shorter and it does not require as much upfront cost.

Manage Your Team Wisely

Pull all of the available sales reports and graphs regularly, preferably weekly. Review the activities and results of your team. Analyze these reports to make sure they are entering a full complement of information. This should include all of their daily activities plus sales opportunities, not just their calls and/ or meetings. Encourage your team to fill in the "Referred By" field. With this information you can manage your team but more importantly you can report your success to the CEO.

Remember to share the success of others to educate and invigorate all. Use the weekly reports as statistics to coach your team to victory. Go team Go!!

Q I would like to multiply the value in one field by the value in another and have that result appear in a third field. I wish I could Figure this out. It seems like it should be really simple. Can you help?

Matt posted on ACT! User Group

A The answer is of course you can but simple is a relative term. A helper application will enable you to perform simple field level calculations, i.e. add, subtract, multiply, and divide within the database. If you are comfortable with macros, you should have no problem with this set up. One caveat, I have not tested this on the latest version of 2005 but it does work with earlier versions back to 3.07.
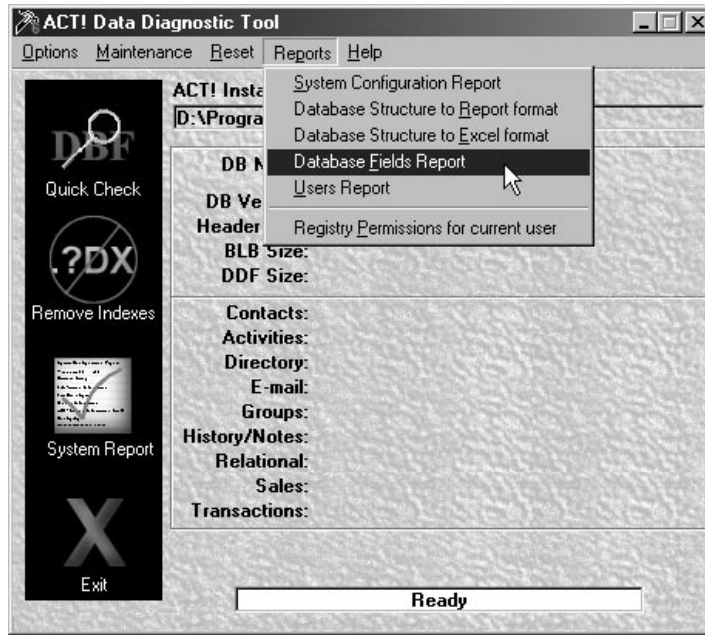
Download Helper Application

Download the free math utility at **www. techbenders.com/addons**. Inside the zip file you will find two files. One is a text file which is an introduction, how to use the utility. The other is an .EXE. Make sure you install it in the directory where the ACT! program is located, usually underneath Program Files, not where your database resides in My Documents.

After you have installed it, open the text file and notice the examples. Jot down your own formula. The text will also refer you to another utility; but don't worry that this is missing because you will be able to get the field numbers another way. If you are already familiar with the utility ACTDiag, you know you can access the Database Fields Report for this information. Read on for a full explanation of how to fully implement this add-on.

Find Field ID with ActDiag

Every field in the ACT! database has a numeric ID assigned to it. This unique number is an internal identification. You
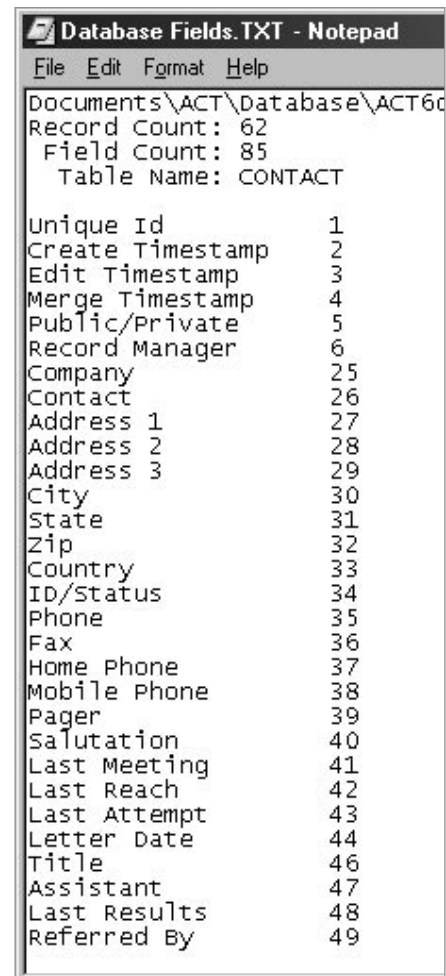

Figure 2. Database Field Report

will need to find the field ID number for each of the fields you wish to use in your calculation. I'm assuming you already know how to set up fields and set the type of field to numerical.

Go to **Start | Run** and type in Actdiag; click OK (see **Figure 1**). You may be prompted to enter your user name and password. Go to **Reports | Database Field Report**, locate and select your database. Open the report in Notepad. Find the field names and the ID numbers. You will need these to set up the computation macro in ACT! If you think you can take a shortcut by opening Design Layout and using that assigned number, you will not get the calculation right (see **Figure 2**).

Edit and Test Macro

Now is the time to craft you own formula so you may want to go back and look at the examples of macros in the text file. Once assembled, you will want to install it in the proper field. For purposes of illustration, we will simplify one of those examples.

c:\act\acttrgr.exe 50+51=52

This simple addition will total two fields with the result to go in field 53.

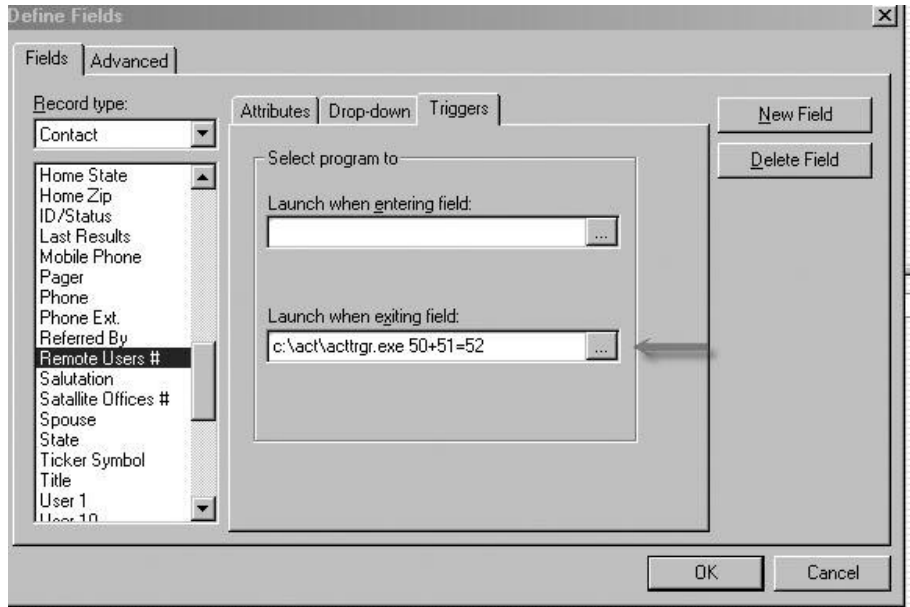Go to Edit | Define Fields. Verify your fields are designated numerical types.

Figure 3. Enter the formula underneath the Trigger Tab in the box labeled "Launch when exiting field"

The field before the equal (=) sign is the one we need to work with. Find it in the list, highlight it and click. Click on the tab Triggers. Click "Launch when exiting field" box. Type your equation in the box; make sure you leave a space between the .EXE and the beginning of the fields (see **Figure 3**).

Test your macro. It should display the results in the field after the equal sign. ◆

Victoria Marechal, is a frequent contributor to ACT! Extra. She is an ACT! Certified Consultant specializing in systems integration and has been designing IT systems since 1992. She is based in Los Angeles, CA. Contact her at vmarechal@marshallassocs.com.

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as much as possible from repetitive jobs. To put all of this into perspective, at the 1964 NY World's Fair, an early computer, the Univac, was exhibited. The plaque posted along side said: "The computer is only a fast idiot, it has no imagination; it cannot originate action. It is, and will remain, only a tool to man. ◆

Victoria Marechal, a frequent contribution writer for ACT! Extra, is an ACT! Certified Consultant based in Los Angeles, CA. She has been designing IT systems since 1992. She can be reached at vmarechal@marshallassocs.com.
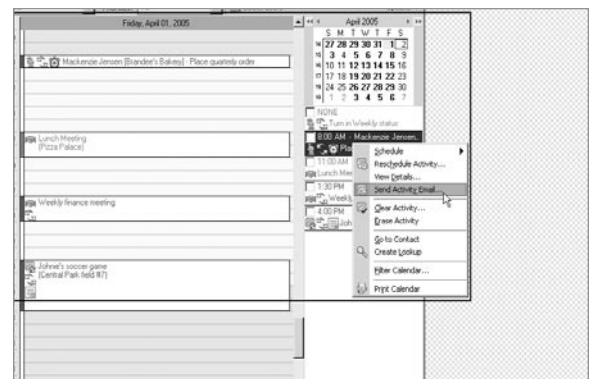
Figure 12. New Invitation

is now history.

In ACT! each contact can only be linked to a single company. The company tab works a bit differently because a single contact can be a member of multiple companies. Sound confusing? Think about it. I am linked to Tech Benders because that is the name of my company. But what if I were a sales rep and I was assigned to several companies all of which I'd like to cross-reference on my contact page? Or what if you have a contractor in your database that works with more than one company? Enter the company tab.

The Group/Company tab is conveniently located on the bottom of your Contact Detail window. When you click on the tab, you have a choice of seeing the membership information for either the groups or companies that a contact is associated with.

Just because a contact is a linked to a company doesn't mean that he is a member of that company. I know this seems like fuzzy logic but this ties in to the fact that a contact can only be linked to one company but can be a member of several.

Don't worry - gaining membership to a company is easy and doesn't require a membership application or initiation fee. You can add new members to the club, er, company from either the Company Detail or the Contact Detail windows. Let's start with an individual contact and sign him up as a member of the company.

1. Create a lookup on the contact that you'd like to add as a member to the company.
2. Click the Groups/Companies tab and show membership for Companies and Divisions. You'll probably find that
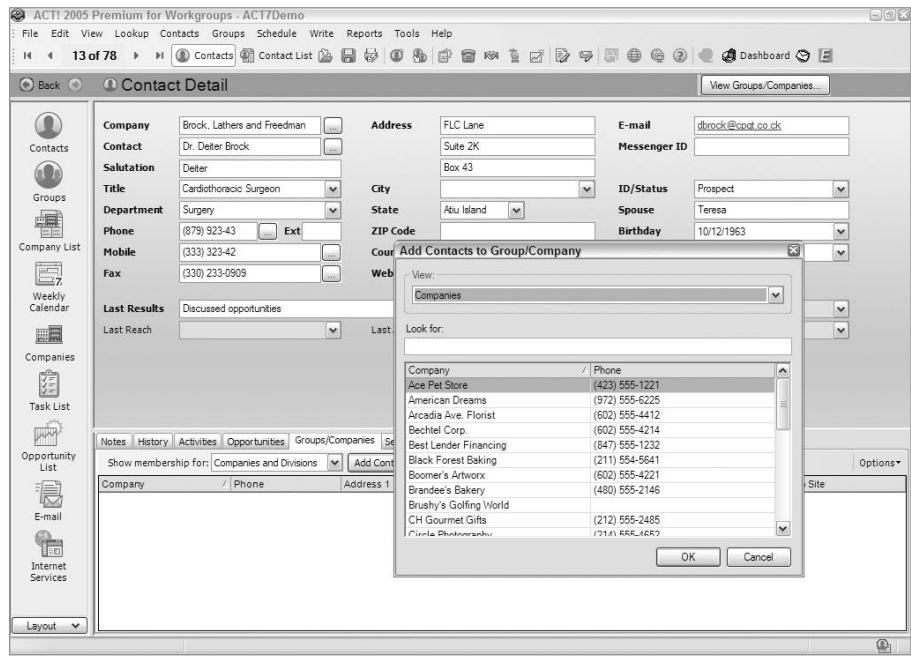

Figure 7.

last step a bit unnecessary; I do too. Just remember that Groups and Companies are forced to share the same tab so you'll have to specify that you are interested in using the Company portion of the tab.

3. Click the Add Contacts to Company button. The window shown in **Figure 7** pops up.
4. Select the Company you wish to link to the current contact and click OK.

Now that you've associated a contact to a company, you can also do it from the Company side. You might want to add several contacts to the company at once so now's your opportunity.

1. From the Company List, double-click the company to which you'd like to add additional members.
2. Click the Contacts tab.
3. Click the Add/Remove Contacts button.
◆ To add a contact: select a contact from the list on the left and then click the right arrow to move the contact

to the Selected Contacts list.
◆ To remove a contact: select a contact from the Selected Contacts list, and then click the left arrow to move the contact to the Contact to select from list.
4. Continue adding or removing contacts. Feel free to add as many contacts to a company as you'd like.
5. Click OK when you're finished. The members of the company will now appear on the Contacts tab of the Company Detail window. ◆

Karen Fredricks, Tech Benders, LLC, Author, ACT! 6 for Dummies, ACT! Certified Consultant, ACT! Premier Trainer

Have a question?

Get help by sending an e-mail to

QandA@ACTextra.com