

May 2005

Cover Story

Driven to ACT!

I can't speak for all of the millions of ACT!! users but I would suspect a lot of you have not even scratched the surface of this program's power. Here are several under-utilized parts of ACT!! to deliver you to your destination.

- 5 From The ACT! Knowledge Center:
How to Back Up and Restore an ACT! 2005 Database

This article will assist you in creating and then restoring a backup in ACT! 2005.

- 7 **New Business Development, part 1**

This month, we begin a short series of articles, designed to help you build your business.

- 9 **Q&A with an ACT! Pro**

We sorted our mailbag in search of a few questions to answer to keep you cool in this summer heat. First, we will give you info on PDA Phones that link with ACT. We'll also be solving two issues with ACT e-mail. We will show you how to reply to e-mail so the history drops into the recipient's record avoiding a misplaced log onto your record, and we will aid a reader who needs to know how to set up an HTML e-mail signature. Finally, work smarter not harder via your internet browser as we preview ACT! 2005 Premium for the Web browser as we preview ACT! 2005 Premium for the Web.

Driven to ACT!

Victoria Marechal
ACT! Certified Consultant, Los Angeles, CA

Do you think ACT! can guide you all the way to the bank? Of course, it is just the vehicle to take you there. This article will show you how ACT! can get you where you want to go.

Some ACT! users will find a few roadblocks on the way. I can't speak for all of the millions of ACT! users but I would suspect a lot of these folks have not even scratched the surface of this program's power. Is software similar to our brains? In other words, are most of us using only 10% of what is available? Why not put some of these neglected resources into high gear. Here is one under-utilized part of ACT! to deliver you to your destination.

Map to Contacts

ACT! will literally guide you to your customers. I'm not talking about a lookup, data mining or some report; I mean finding your contACT!'s location on a map. It's one of the newest goodies in ACT! 2005 and it is not even promoted as an enhancement. It is so simple to use; it's only one click.

In Los Angeles, where I'm based, this feature comes in very handy when I need to go to meet a new client. So I can

honestly say I'm driven by ACT!. And as far as you men are concerned, it might even be a miracle; just think: You may never need to ask for directions again!

If you have not already, check out the globe icon in ACT! 2005. It is located in the upper right hand side of the toolbar. See **Figure 1**.

With one click, MapBlast will automatically display a map of your contACT!'s location. For those who have not upgraded to the latest, you *can* get this to work in ACT! 6.0 or 5.0, but it will take much more effort. You need to be of an advanced level, otherwise, use an ACC to engineer this set up. Read on for the roadmap on how to build the Map interface and more related tools to draw information directly from the internet (see **Figure 2**).

Overview of How Internet Links Works with .WEB Files

You can get real-time information related to a contACT! from the web. For instance, you can find what the weather and 5 day forecast is for your contACT!'s location. Beside the maps, you can look up other information about a company or contACT!. This type of link can

Continued on page 2

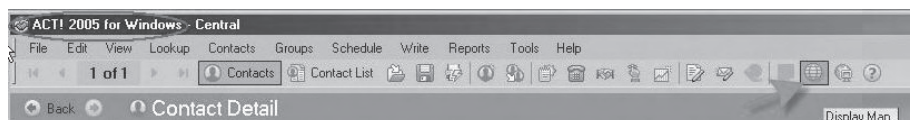


Figure 1. Hovering above the Map icon in ACT! 2005

Driven to ACT!...

Continued from page 1

automatically insert your information to do internet searches. Plus, it can deliver a handy dictionary (Sadly, it does not work in the Notes area).

The first part is easy -- just download the Internet Link file. But as you proceed, it gets progressively more challenging. The Links are simple to use; all you will have to do is land on the desired contACT! and run the link, but this is where the bigger challenges begin. It is necessary to fix these links to get it to run perfectly. You will need to read this article thoroughly to be prepared. I have described the fix in detail. After you have gotten up to speed and are confident to move forward, you can customize these links for a world of possibilities.

In general, we are going to download a little file, unzip it, and load it onto a specific location. If you choose to make

this your final destination, I'm going to recommend you delete a couple of links to eliminate a significant issue, see Links that Provoke Debugger. And if you want to travel further with me we can customize and fix these tools for a lot more functionality. So come with me as we create a small WEB file which will extrACT! the current contACT! information and deliver lookups via Internet Explorer. That's all there is to it; does it seem simple enough?

There is only one other issue for you to consider besides a bit of a complex set up. Before you download, you will find a Disclaimer regarding Internet Links. This legal notice says this download hasn't been tested extensively and Tech Support will not assist you with this "patch". Although a significant issue popped up with a two Internet Links, it was easy for me to handle without dire consequences. I will describe these exceptions in detail and how I handled the problem. Continue to read

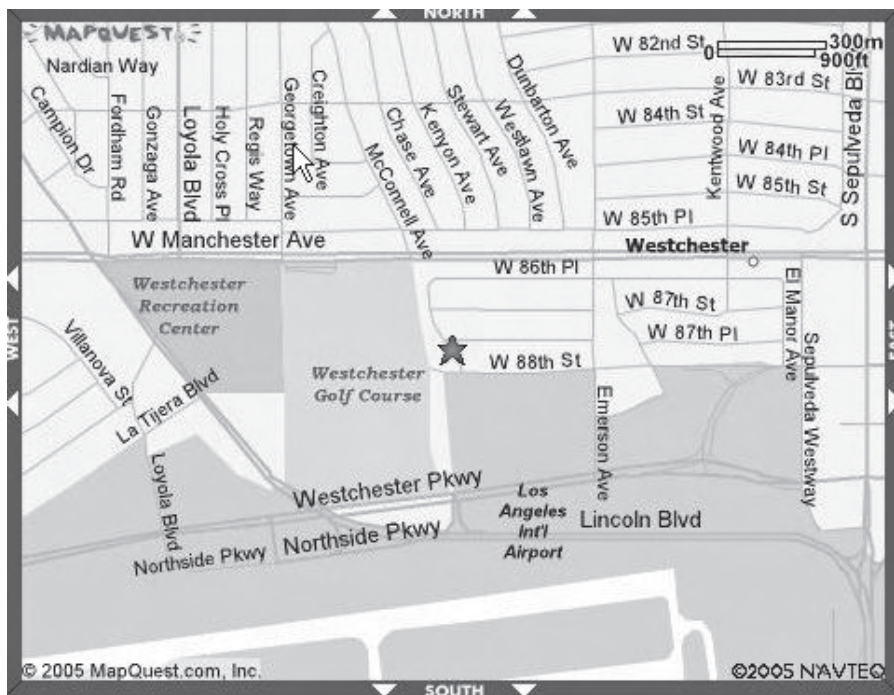


Figure 2. MapBlast displays address location

May 2005, Volume 4, Issue 5

ACT! Extra is published monthly (12 times per year) by Buzz Publishing Inc., PO Box 828, Roswell, GA 30077.

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SUBSCRIPTION RATES:

United States: One year (12 issues) \$109.95

Two years (24 issues) \$219.95

International: One year (12 issues) *\$129.95

Two years (24 issues) *\$239.95

Single issue rate: \$14.95 (International *\$16.95) *Funds must be in US currency

POSTMASTER: Send address changes to:

ACT! Extra
PO Box 828
Roswell, GA 30077

Publisher: Howard Flint

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

ACT! Extra
PO Box 828
Roswell, GA 30077

Phone 1-888-422-9267

For International Callers: 770-518-0309

Fax 770-992-9549

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through this article before you decide to progress. If you decide to move forward and are very confident you can handle the consequences, I suggest you make a backup beforehand. It is very important for me to let you know -- your circumstances could be different from mine. Therefore, Caveat Emptor.

Download Internet Links

Are you ready to warm up your engines and download? Go to www.ACT!.com/support/updates. Scroll way down the page to "Updates". Select ACT! 6.0 Internet Links. Click Download now. A dialogue window will open and allow you to select either to Open or Save the file.

While ACT! suggests you save it on your Desktop, I prefer to save it on a portable USB hard drive where I permanently store all downloads. I do this instead of burning individual CDs. It is my way of easily keeping the multitude of downloaded programs that might be needed for a clean reinstall (see **Figure 3**).

Shut down ACT!. Locate the saved download and unzip the file. Answer the dialogue box with the specific location of your ACT! program folder NetLinks. Usually this folder rests underneath C:\Program Files\ACT! in a folder titled NetLinks. The unzip must go to the

NetLinks folder.

To verify the location of NetLinks folder, open ACT! and click on **Edit | Preferences**. Underneath the General tab, look to the left for the Default Locations area. Select the File Type, NetLinks, and the location will appear in the field. If it is not correct, you can Browse to get the program to point to the right place. If you have not already, complete the Unzip of the download to the appropriate location (see **Figure 4**).

Get Driving Directions, Maps, Stock Prices, and Weather Too

Open ACT!. Click on the Online from the main menu and go to Internet Links. You will now see several new links for Driving Directions, Maps, Weather, and so forth. Notice you can keep tabs on stock value too if you have filled in the company's ticker symbol for a contact! (see **Figure 5**).

Not all of these links worked as planned so here is a detail listing of the links including the file name and what I found to be performance issues.

Internet Links Described in Detail

Links that worked flawlessly for me:

Dictionary: Opens One Look Dictionary and delivers definitions or links to, 50001dic.web

Maps: Opens a Yahoo map for the current contact!, 9901map.web.

Weather: Yahoo will get the 5 day forecast for your current contact!, 9903wthr.web

Ticker Symbol Lookup: Using the current

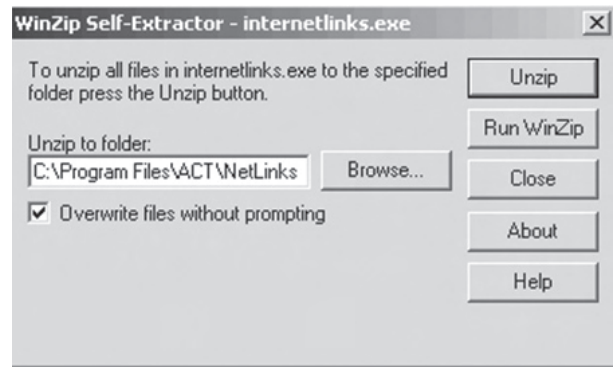


Figure 4. Unzip to NetLinks

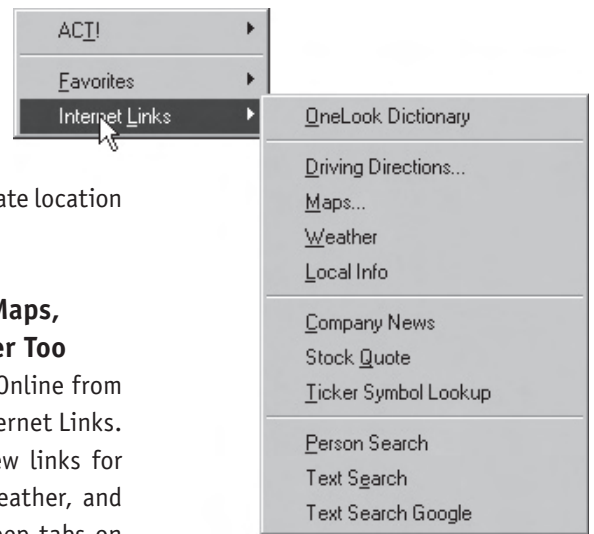


Figure 5. Menu of Internet Links

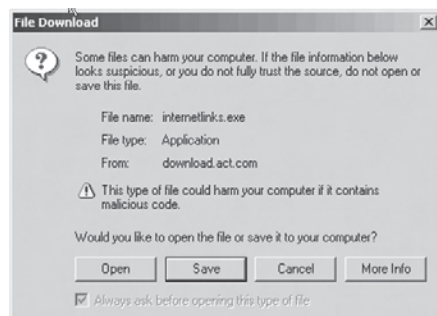


Figure 3. Download Internet Links.exe from www.ACT!.com/support/updates

contact!'s company name Yahoo will give you the stock symbol. Place this symbol into the field Ticker Symbol to make the next lookup work. File is named 9908tick.web

Stock Quote: Yahoo give real time stock quotes from the Ticker Symbol field, 9907quot.web.

Person Search: Gives you a Yahoo search of the contact!'s name, 9910per.web.

Imperfect Links – these work but need a little hand from you to work exactly as planned.

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Driven to ACT!...

Continued from page 3

Here are the two that worked partially. These two are dependant upon you to type in some info. So it was not automatic as it did not exchange info in such a way as to make the lookup complete. But even so, I did get the opportunity to complete the lookup manually.

I believe these are flawed due to rewritten HTML on the featured website. Therefore the field info does not drop in where it was originally planned. Less likely but another possible affect is due to the way the .WEB file identifies the contact! fields. Some of the fields, I have noticed, do not contain the numeric designation for that particular field.

Read on, you can learn a do it yourself fix and maybe create a few new ones of your own.

Driving Directions: Because Yahoo has rewritten the HTML code for this page it only partially works, you will need to type in yours and the contact!'s zip code to make it work. File is named 9901driv.web.

Local Info: this will open the Yahoo local search but it does not load automatically the location address. File is named 9904locl.web.

Links that Provoke Debugger

Debuggers. -- Gee, this would be the perfect opportunity to come up with a rakish joke, but propriety and my publisher put on the brakes. Why don't you come up with one of your own. The following Internet Links invoke Just-In-Time Debugger. I had to click on "No" three times to make it go away.

Caution: If you by accident click yes, the Debugger will start to debug the entire ACT! program and possibly

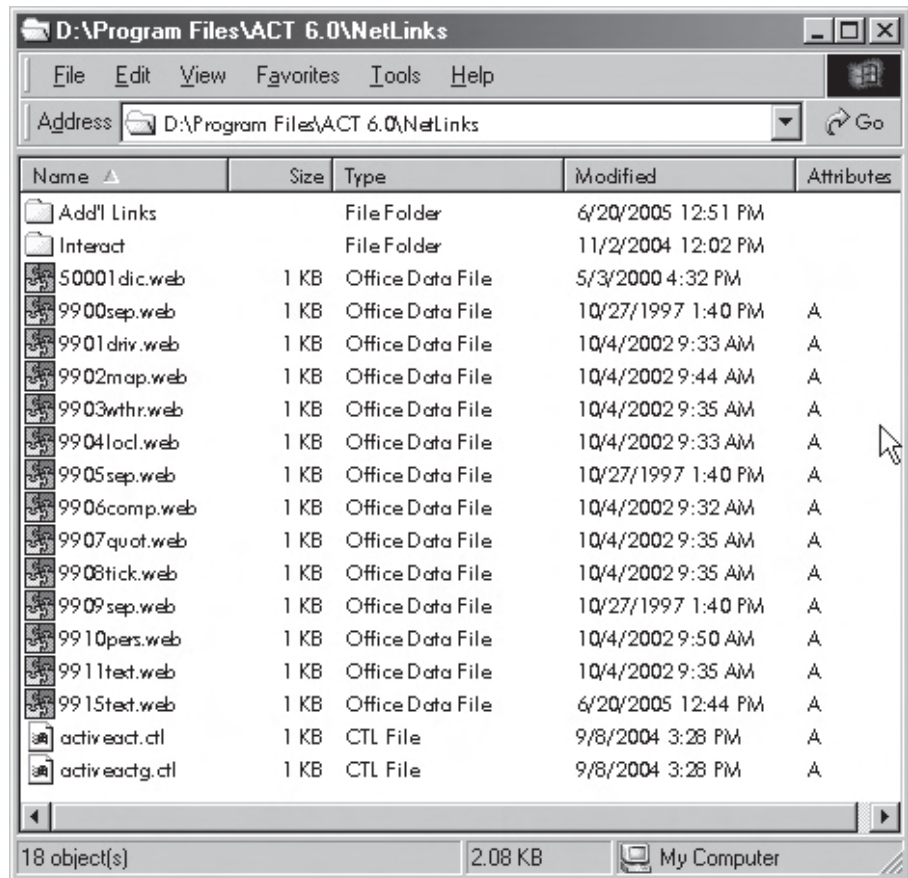


Figure 6. View the existing .WEB files

corrupt the program and maybe your data. If that is the case you may have to reload the whole ACT! program. That is why I suggested you backup your data earlier in this article. If you can not make the Debugger go away, use Ctl - Alt - Del to open Task Manager and shut down the debugger. If you choose not to fix these links, I strongly recommend you delete these from Netlinks so some unsophisticated user doesn't cause a crash and/or corruption.

Company News: Broken interface, Debugger opens. File is named 9906comp.web.

Text Search: Riles up the Debugger too. File is called 9911test.web.

.WEB Fix It

As we begin our fix it, you may recall,

each of the Internet Link menu items corresponds to a separate text file with the .WEB file extension. These files are stored in ACT!'s NetLinks folder which is the same place we put the unzipped Internet Links file, as was described above.

Careful, unlike most ACT! files, WEB files are read once when ACT! starts. If you create or modify .WEB files, first you must exit, make your changes and then restart ACT!

I have chosen the buggy Lookup Text to tune up. We can adapt it to use a Google search and it will run beautifully. Follow along, I think you will find it a very smooth ride from here to our destination.

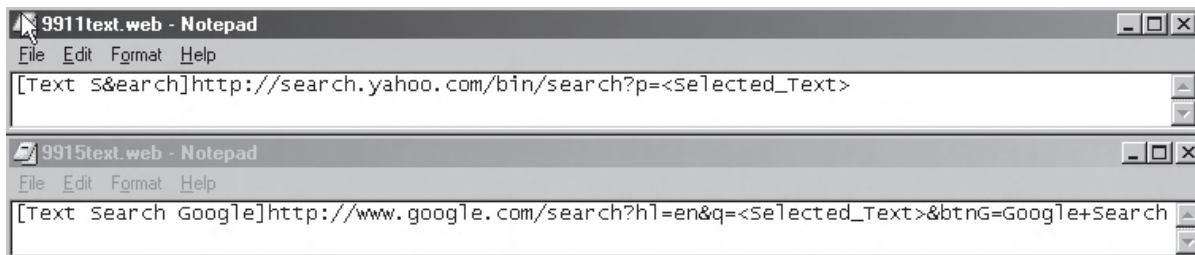


Figure 7. Contents of both old and new WEB files

Go to the .WEB files via Windows Explorer

Close ACT!. Go to Windows Explorer and navigate to your ACT! program files (usually C:\Program Files\ACT!). Go one step further and find the NetLinks folder. Click to open this folder. You will find about 15 files; most have the file name extension of .WEB (see **Figure 6**).

Select the WEB file to Edit and Save As Immediately

Select the file 9911text.WEB, right click, and open it with Notepad. I strongly recommend you immediately use Save As and create a new name. You can see

from the **Figure 6** screen shot, shown above, I have already modified the file name to 9915text.WEB. The WEB files are arranged on the drop down menu in numerical order so that is why I chose a file name to fit in line with the number sequence.

It is important to save the file as a WEB file and not a txt file. You can insure this by placing quotes at the left and right edges of the file name. For instance, I will save this file exACT!ly "9915text.WEB." This will make sure the file is readable by the Internet Link Menu and upon saving the Notepad program, doesn't try to sneak in a txt

file extension at the end of the file name (see **Figure 7**).

View the WEB file in Notepad.exe

The old 9911text.WEB file contains the following:

```
[Text S&earch]http://search.yahoo.com/bin/search?p=<Selected_Text>
```

Breakdown of Contents of WEB File

The first part in brackets is the menu name. This will appear in your Online | Internet Links drop down menu.

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From The ACT! Knowledge Center: How to Back Up and Restore an ACT! 2005 Database

Product(s): ACT! 2005 for Windows; ACT! 2005 Premium for Workgroups

Operating System(s): Windows 2000; Windows XP Home; Windows XP Pro; Windows 2003 Server

Situation:

You would like to create a backup of your database or restore a previous backup.

Solution:

The following steps will assist you in creating and then restoring a backup. Please note that ACT! 2005 has security features which apply to backup and restore functions.

Please see the following

Knowledge Base document for additional information on this topic:

Title : What are the Security Levels in ACT! 2005

Document ID : 20031061474

Web URL : <http://itdomino.act.com/act.nsf/docid/20031061474>

If you are creating a backup to your local hard drive, to a network drive, or to a removable drive such as a Zip drive, follow these steps. If you are creating your backup on CD or using a tape backup system, read the section for creating a backup to these devices.

You Can Check out Lots of Great article FREE on the ACT! Knowledge Center:
<http://www.act.com/support/technicalsupport/index.cfm>

Floppy disks cannot be used to back up your ACT! 2005 database.

What files are included in an ACT! 2005 backup?

- ◆ Database
- ◆ Attached Documents
- ◆ Layouts

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Driven to ACT!...

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The second part is the http portion which shows the specific URL link to Yahoo lookup. Within that and after the equal = sign, and enclosed in angle brackets, is the text drawn from inside ACT!.

Find Structure to the New Lookup Criteria

To find out what I needed for a lookup in Google, I went to Google and typed in Selected Text and hit Enter. The browser address box displays the syntax I need. The part of the web query with Selected Text is the only area I will need to modify.

In general, and for future reference, if you want to create a new Internet Link, you can use this same technique to pull formats which indicate the field name. Just go to the online address and fill in each box with the ACT! field name. This will help you retain the exACT! syntax and just drop in the right field tags. You might want to open ACT!DIAG to locate the field names and numerical identifier. I noticed that some of the existing IL in ACT! have field numerical designations but some did not. Although I did not have trouble with those without the number, I am not sure how it might affect performance (see **Figure 8**).

Paste into New WEB File

Copy the complete address shown in the browser bar. Paste it into your new WEB file but don't copy over the old formula just yet. This is the Google search syntax in its raw state: **http://www.google.com/search?hl=en&lr=&q=selectedtext&btnG=Search**. The highlighted area

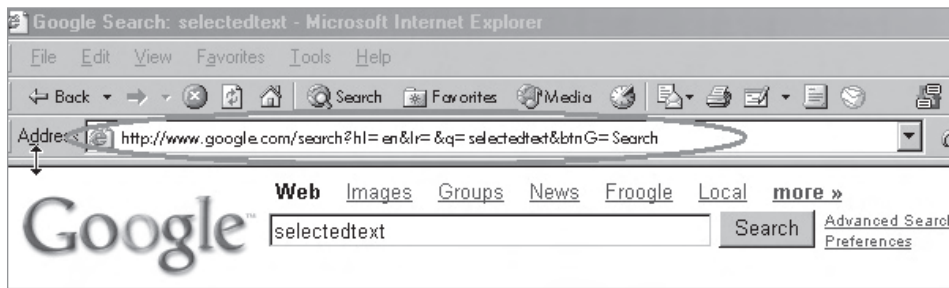


Figure 8.
Google sample of query text

is the part we will modify.

Modify the Text and Save

There are two parts to change. Keep in mind there are no spaces in a browser based query. First is the menu designation. It leads the text and is shown within brackets. We must make this unique from the older file, [Text S&earch]. So I have modified it to read [Text Search Google]. Use an optional ampersand to create a menu shortcut. The ampersand should proceed the shortcut letter and must be unique to that portion of the menu.

Now we will break down the other part which specifies ACT! field data to push out into the internet. Specific to our new link is "selected text" which we were able to include in the Google syntax. To specify the exACT! field information to be uploaded, refer to the old query in **Figure 7**. You will want to insert the same field syntax as the old file. In this case it will be <Selected_Text>. Therefore, our edited file should contain the following:

```
[Text Search Google]http://  
www.google.com/  
search?hl=en&q=<Selected_  
Text>&btnG=Google+Search
```

If you have followed the earlier instructions and have already saved the file under a new name, you can save and close your new WEB file. Remember to use quotes to maintain a WEB file name extension.

Test your new Internet Lookup

Open ACT! and go to a field within a contact! that has suitable text to test our lookup. First highlight the text you want Google to lookup. Go to the Online menu, drop down to Internet Links and select our new Text Search Google. If your syntax is properly tuned you will see the results immediately.

Other Thoughts on Developing New Internet Lookups

Keep this function in mind for regularly performed searches on the internet. You can automate anyone of those queries and it can be a huge time saver. Since you now understand all of the pieces to put this together, you can modify and correct the flawed, existing IL or make your own from scratch.

The basic secret is to find a form on the internet and fill in the boxes with ACT! field names. This will help you identify exACT!ly the area to modify and create your very own specialized Internet Links.

I'm thrilled with the maps to get to my customers. Now, if only someone could clean up the traffic jams in LA before I am driven berserk. ♦

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New Business Development, part 1

Andrea B. Edwards
Vice President, Business Development at Bullfrog Solutions

This month, we begin a short series of articles, designed to help you build your business. Each month for the next few months, we'll touch on a different aspect of New Business Development (aka: prospecting for new business, trolling, dialing for dollars, etc.).

In my experience as a sales person and a sales consultant, I find that this entire subject of prospecting makes grown ups act like petulant children and use every available (lame) excuse to avoid it. Like going to the dentist, you're glad when it's over, and it's awful getting yourself there. I've often wondered why we loathe prospecting so much, and after much thought and research, I've concluded what you, dear reader, have already figured out: who wants to be rejected, or talk to a recording device (voice mail) and never get any confirmation that we're getting anywhere?????

For a long time, the most commonly known form of New Business Development (only then it was known as prospecting) was the telephone. Until we had to use it to speak to strangers, the

phone was our friend, often carrying good news ("You've been awarded the contract."). All of a sudden, when we have to pick up the phone, call strangers (strange people?), and talk about our product/services, the phone becomes our enemy!

I'd like to propose an updated approach to New Business Development, which is a combination of sending a letter via conventional mail (sounds quaint, doesn't it?) and following it up with several phone calls. I call it the Five Touch Point Campaign (FTP). This approach has been developed over the past few years with a former business partner and is a reflection of understanding that our buyers now buy differently than in the past. It's really a bow to accepting that our buyers are much more sophisticated (and demanding) now, and therefore need to be "sold to" in a different way. Many of my clients have used this approach and have had a very good close ratio (when compared to only cold calling): a 3.6% close ratio (standard rates are less than one per cent).

The FTP campaign has two parts:

Three letters, sent once a week for three weeks, followed up by two phone calls in the fourth week. The genesis of this program was some research done a few years ago by Sales and Marketing Magazine, showing that the vast majority of sales people stop calling prospects (suspects?) after two – maybe three-tries, and it's after the fifth touch point that the probability of closing business goes up to 50%!

Letter 1, sent out on a Monday, talks about common business issues or common goals that your targeted audience can identify with. For example, in the technology arena, I might suggest that some of the issues they're dealing with are "shrinking profit margins" and "significant dollars spent outsourcing work." Be sure to target goals or issues that your product or service can fix. Reference no more than 4 issues.

Letter 2, sent to the same group a week later, should include *how* your product or service can specifically address the issues you referenced in the earlier letter. If you brought up 4 issues, be sure to include 4 highlights of your product that can rescue them. Think of the first letter as the "hurt" and the second letter as the "rescue." Be careful that this letter does not become a "core dump" of how simply fabulous your product or service is. Your reader will be turned off and your approach will fail.

Letter 3, sent to the same group a

Continued on back cover

TABLE 1	Week 1	Week 2	Week 3	Week 4
Group A	Letter 1	Letter 2	Letter 3	Phone calls 1 and 2
Group B		Letter 1	Letter 2	Letter 3
Group C			Letter 1	Letter 2

Table 1. A suggested schedule for the FTP campaign

Backup and Restore...

Continued from page 5

- ◆ Document Templates
- ◆ Report Templates
- ◆ Saved Queries

Personal Files may also be backed up.

Personal Files include:

- ◆ Documents that you have saved
- ◆ Internet links
- ◆ Spell check Dictionaries

There is a separate process for creating this backup, covered in the following document:

Title : How to Backup and Restore Personal Files in ACT! 2005

Document ID : 200432514219

Web URL : <http://itdomino.act.com/act.nsf/docid/200432514219>

Database Backup

1. Click the File menu, point to *Backup*, and then click Database. The *Back Up Database* dialog appears.
2. Verify the location for the backup. This backup may go to a removable drive, such as a zip drive, to a network drive, such as H: or S:, or to your local hard drive. Under most circumstances, you will NOT be able to send your backup file to your CD-ROM drive using the ACT! backup function. Click Browse to change the destination of your backup. (if necessary)

3. For added security, password protect your backup file by enabling the **Password protect file** option.

Note: Once you have set a password for this backup file, the file can not be restored and there will be no way to retrieve the data without the password.

4. Click **OK** to start the backup. A *Back Up* progress indicator appears as your database is backed up.
5. If the backup is successful, a *Backup* dialog will also appear to indicate that the backup was completed successfully.

Creating a Backup on CD or automated backup system

You will not be able to create a backup file directly to CD or use an automated backup system to work through the ACT! program to backup the ACT! database. You will need to create the backup file separately, and then use your CD burning software to store the backup file on the CD or direct your automated backup system to your backup file.

1. Click the **File** menu, point to *Backup*, and then click **Database**. The *Back Up Database* dialog appears.
2. Click the **Browse** button. A *Save As* dialog appears.
3. Click the Desktop button or change the Save In field to an alternate location on your hard drive for this backup. (the Windows Desktop is

suggested), enter a new File name (if desired) and then click Save. The Backup Database dialog re-appears.

Hint: Adding today's date to the File Name will help organize your backup files and prevent overwriting of your previous backup.

4. At this point, you have the option to set a password for your backup. Adding a password is not required. This adds more security, ensuring that only an administrative user of that database who has the password will be able to restore the backup. Note: Once you have set a password for this backup file, the file can not be restored and there will be no way to retrieve the data without the password.
5. Click **OK** to start the backup. A progress indicator appears as your database is backed up.
6. Use your CD Burning software, provided with your CD Recorder, to safely store the file on CD, or use your automated backup system to back the file up to tape. If you need assistance with these products, please contact the software vendor. Sage Software does not provide support for these products. ◆

For Restoring a Database, see the continuation of this article on <http://itdomino.act.com/act.nsf/docid/20043108032>

Are you missing an issue? Did you receive a damaged issue?

We want to know about it, and we want to fix it.

Write to us: Subscriptions@ACTExtra.com

“Ask The Pro” Q&A with an ACT! Pro

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

In the heat of summer, most of us want to keep chillin’. So we sorted our mailbag in search of a few questions to answer to keep you dew fresh and not force you to breaking into a sweat. First, we will give you info on PDA Phones that link with ACT. You can keep in touch with your clients at the same time looking good to your boss despite the fact you’re multitasking, and getting a tan. We’ll provide a little air conditioning between your ears solving two issues with ACT e-mail. We will show you how to reply to e-mail so the history drops into the recipient’s record avoiding a misplaced log onto your record, and we will aid a reader who needs to know how to set up an HTML e-mail signature. Finally, we will see to it your vacation is much easier, or at least subvert your attention to the productivity mantra: Work smarter not harder via your internet browser as we preview ACT! 2005 Premium for the Web.

We enjoy our subscriber’s questions and comments. Keep in mind we do need to know the version of the software you are using so we can tailor our response to your query. And it bears repeating - although we wish we could, we do not reply to reader queries directly.

ACT! 2005 Performance with Pocket PC/Phone

Q I’m a CEO of a startup company with a “smartphone”. Before I got ACT!2005 I was rather pleased with it. But now I re-

alize it’s a dummy phone; it won’t even talk to ACT! Would you give me info on the latest units to choose from?

KDW via e-mail to Buzz mailbox

A You hit the nail on the head; some of these so called smart phones don’t measure up. It depends upon who is defining “smart”. Obviously it is a subjective description, loosely tossed around. Even Microsoft earlier this year decided to opt out of the trade names Smartphone and Pocket PC in favor of the very branded moniker “Windows Mobile.”

Following up on last month’s question about the latest PDA Phone we have put together a comparison chart (see **Figure 1**) to help you make your decision. In compiling the chart we selected best selling units available in the United States. In doing so, we searched five major cell phone providers and manufacturers in addition to independent reviews. All of that research aside, the durability of data on the internet fluctuates greatly, so there is the possibility some sources are out of date. Comparing this list to a chart I created less than a year ago, it is interesting that in time the marketplace has narrowed with fewer Palm and Microsoft units. Yet the most surprising revelation is the proliferation of Symbian. Even though Symbian is a joint venture by Ericsson, Panasonic, Nokia, Samsung, Siemens AG and Sony Ericsson, and has a big foothold in the cellular industry, it’s limited to cell

phone functions only. It is not exactly an operating system, it doesn’t interface with a PC desktop, and it is unlikely to evolve to that point.

It is hard to cull through all the hype. You will find carriers pushing “smart phones” without the a clarity of functions. At my cell phone carrier’s retail stores there is a proliferation of phones on display. But the more sophisticated, PC friendly ones are not displayed prominently. Fewer yet are models available for immediate activation. Am I to assume all of the really “smart” phones are at a Mensa meeting, or are they just on backorder?

Since the marketplace changes quickly, you may find a phone listed that has been dropped by a carrier, or a phone not listed on our list. If you are perplexed, keep in mind you can automatically exclude some PDA phones based upon the phone operating systems because they don’t talk to ACT. If it runs on Symbian, don’t even think twice. Or if it is a proprietary systems, read homemade, with the exception of the Blackberry, just walk away. You don’t need the aggravation.

Caution: Readers using earlier ACT! versions, be very careful which ACT! link you choose to download. There are two versions of either ACT! Link for PocketPC which could be confusing. One of these only synchronizes with ACT! 2005 Standard or Premium, the other works with 6.0. The only clue on the website

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is the positioning underneath the related version, therefore the 6.0 link is listed under ACT! 6.0. It's easier to see the difference for the Palm sync as it is identified as ACT! Link 2.0 for Palm OS (6.0) or ACT! Link 2005 for Palm OS. Bottom line: Your sync software is determined by the ACT! version on your computer.

While there is the ACT! for Palm, an application that puts your whole ACT database on the Palm, it does not work with 2005 -7.0 versions. The 1.0 version is a couple of years old and we have not been informed of an upcoming release.

Besides the free ACT! Links, there are several other linking applications that work with Palm and/or Microsoft operat-

ing systems. Check out Companion Link Professional (\$79.95), Chapura's Pocket Mirror (\$29.95), Puma Tech's Intellisync (\$69.95), TransACT! for Pocket PC (\$99.00), XTNDConnect (\$44.95), plus Handheld Connect for Blackberry, a wireless sync service (\$179.00 one year). If you are dealing with MS Exchange, this could restrict your selection of software link.

In an upcoming issue we will look at the most exciting ability to access and maybe sync directly to ACT! via the internet with the upcoming initial release of ACT! Premium for the Web. You might want to plan to upgrade your wireless phone to include internet access to take advantage of this ultra cool innovation.

can be maddening.

It can be changed but you must do it each and every time you reply to an e-mail. I guess you do have a choice; you don't have to reply to anyone's mail – Now that's a refreshing thought.

Here is how you fix the reply issue. Initiate an e-mail Reply. Click on the "To" button to open the "Select Recipients" dialog box. Select from the scroll down list or use the type ahead feature to send. This will apply the e-mail history, be it subject or subject to the appropriate contact.

Elegant Signature for E-mail

Q I have noticed quite a few people who have a fancy closing at the end of their e-mail. Sometimes they even use their own handwritten signature. Can you show me how to do this? Oh, by the way I am using ACT 6.0.

Lisa via e-mail

A Yes, this is done by setting up an HTML e-mail signature. Take your pick, the hard way or the simple way. We will tackle the easier one first. If you decide to take the challenge and go the more difficult path, you should have some understanding of the HTML code. And you want to make sure you have the right software tools for composing in an HTML mode, like Outlook, FrontPage, Netscape/Mozilla Composer, or Microsoft Word, etc.

Verify Your Settings

Within ACT!, check your composing options. Go to **Edit | Preferences**. Look for the **E-mail** tab. Click on the **Composing Options** box to open the selection window. The **Send Messages** preference must be specified as HTML. Notice the

Errant E-mail

Q When I reply to an email, it does not go under the notes/history column of that contact. Instead, it gets attached underneath the Notes/History of My Contact.

In other databases I have set up, the reply gets filed away under the appropriate contact. Any ideas?

Joe via e-mail

A Of the ACT! e-mail preferences "Create History," including the subject and text of my e-mails is a wonderful thing. It is the best tool for my business since I use so much e-mail, and one that I would have a hard time doing without – so if it gets misplaced under My Contact, it

Model/Make	Sync Software	OS	Transmission Method	Carrier	Extras	\$ for service contract (discount)
Audiovox PPC 6600	ACT Link for Pocket PC	WinMobile 2003 SE	GSM or CDMA depends upon carrier	Cingular, Sprint	Bluetooth, Mini SD Card Slot, optional camera and 30 sec VGA	\$ 479.00
Blackberry 7100t	3rd party sync or Wireless sync via ACT Handheld Contact	BlackBerry tm 4.0	GSM/GPRS	T-Mobile	BB browser, Bluetooth, Two USB cables included	\$ 199.00
Blackberry 7230	3rd party sync or Wireless sync via ACT Handheld Contact	BlackBerry tm 4.0	GSM/GPRS	T-Mobile	BB browser	\$ 299.00
Blackberry 7250	3rd party sync or Wireless sync via ACT Handheld Contact	BlackBerry tm 4.0	GSM/GPRS	T-Mobile, Verizon	BB browser, Bluetooth	\$ 299.00
Blackberry 7520	3rd party sync or Wireless sync via ACT Handheld Contact	BlackBerry tm 4.0	GSM/GPRS	Nextel	BB browser, Bluetooth	\$ 149.99
HP IPAQ h6300	ACT Link for Pocket PC	WinMobile 2003	GSM/GPRS	T-Mobile	Bluetooth, WIFI 802.11.g, optional camera, extended battery	\$ 499.00
Kyocera 7135	ACT Link for Palm	Palm OS6 4.1	CDMA	Alltel, Verizon	Clamshell design	\$ 199.00
Motorola MPx220	ACT Link for Pocket PC	WinMobile 2003 SE	GSM Quad	Cingular	Bluetooth	\$ 399.00
Samsung i700	ACT Link for Pocket PC	Pocket PC 2002	CDMA	Verizon	Camera	\$ 499.00
Samsung i730	ACT Link for Pocket PC	WinMobile 2003 SE	N/A	Verizon	Bluetooth, WIFI	\$ 599.00
Samsung SPH-i500	ACT Link for Palm	Palm	CDMA	Sprint	Clam shell design, optional extended battery	\$ 299.99
Siemens SX66	ACT Link for Pocket PC	WinMobile 2003 SE	GSM/GPRS	Cingular	Bluetooth, WIFI 802.11b	\$ 499.00
Treo 600	ACT Link for Palm	Palm OS 5.4	GSM or CDMA depends upon carrier	T-Mobile, Verizon	Camera	\$ 299.00
Treo 650	ACT Link for Palm	Palm	GSM or CDMA depends upon carrier	Cingular, Sprint, Verizon	Bluetooth, Camera/Video	\$ 449.00

Figure 1 Comparison of PDA Phones

pointing arrow in **Figure 2**.

If you are using Outlook you can verify the HTML settings. Go to **Tool | Options**. Click on Mail Format and verify the setting for HTML. Do not checkmark the other boxes regarding Word and RTF. See the Outlook options in **Figure 3**).

Simple Solution: Create Default HTML E-mail with Signature Inside

The easiest solution is to set up a new default e-mail template so you can use it automatically each time. The file name

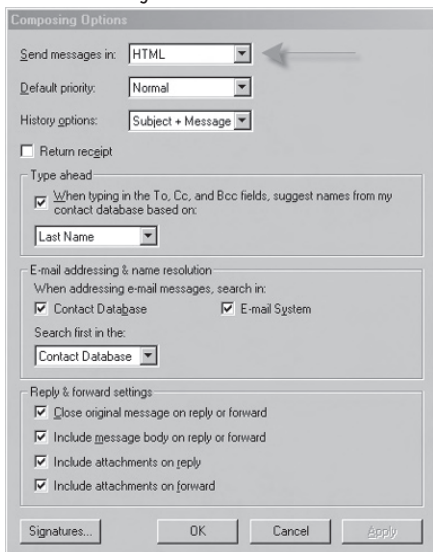


Figure 2. Composing Options

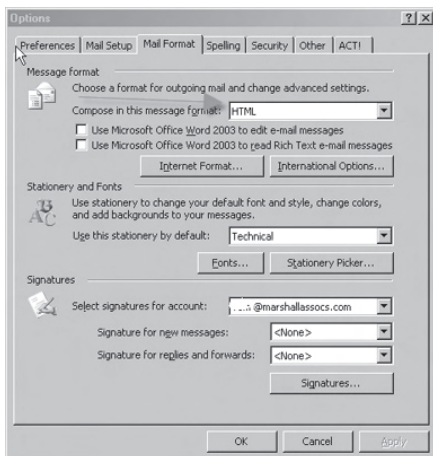


Figure 3. Outlook Options for Composing Mail Format

extension for the 6.0 e-mail templates is .GMT. Go to **Write | Edit Graphical E-mail Template**. Open the file called emailbody.gmt. This is the file we use when we use the e-mail merge within ACT!. Usually I immediately “Save As” when I am working with a default template. However, in this instance it is our goal to keep this file as the default so it will work with the standard Menu commands. (See **Figure 4**).

The ACT! Word Processor will open. Close the Mail Merge Fields window. If you need it later you can find it in a drop down menu. This is where you will get creative. Set up your typed signature by customizing it with your font and size. Insert your web address, telephone number, and so forth. If you do use a special font, keep it one that is widely distributed therefore relatively basic so you can rely on it to be available on the recipient’s computer. Basic sans serif fonts are Arial, Helvetica, Tahoma, and Verdana. Widely distributed serif fonts are Georgia, Times New Roman, and Times. You can also add your handwritten signature or your photograph by inserting a gif or jpg image. Go to **Insert | Image**. You should add alternate text to identify the image if for some reason the image is blocked by e-mail reader (see **Figure 5**).

As you finish, **Save** the file. Remember

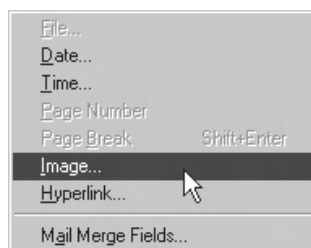


Figure 5. Insert Image

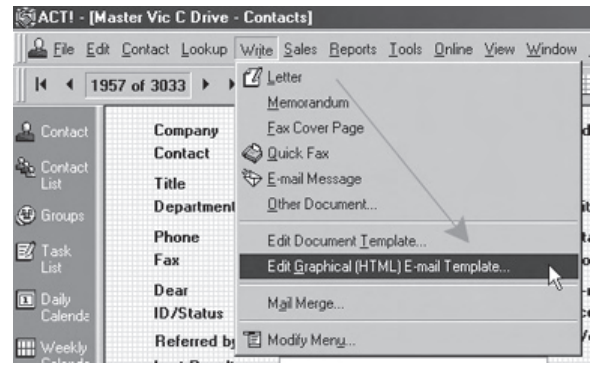


Figure 4 Edit Graphical (HTML) E-mail Template

to check your e-mail by sending it to yourself before you distribute it to others.

Create Customized HTML Signature to Use with Outgoing E-mail

This is the more complicated method but it will give you the most flexibility as you can use this signature with any e-mail template. Open one of the above named applications (Outlook, FrontPage, Netscape/Mozilla Composer, or Microsoft Word, etc).

The Mozilla Composer I use is very helpful. It offers three different views. You can see the hard HTML code, a tagged view, as well as a preview tab. Plus it creates a much simpler code than the other three Microsoft products.

If you are a novice, you can find a sample e-mail signature file on the ACT! Knowledge Base to use as a starting point. Drop this code into one of these applications and modify it to suit your circumstances.

As a precaution, once your signature is refined, save your work using **Save As** as a text file in the raw code format of the HTML. You will however, be copying and pasting this hard code into the E-mail Preferences of ACT!. So keep the file open for convenience.

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Open ACT! Go to Edit | Preferences | E-mail | Composing Options (see **Figure 6**).

Look at the lower left of the Composing Options window and click on the **Signature** box (see **Figure 7**).

Click on New. It will by default name your new signature "Signature 1."

Look carefully back at the code you have developed. See the place where we want to begin to copy. It is identified by <body...>, the opening tag, which is the start of the vital code. Find the end tag, near the end, and identified as </body>. Highlight the <body> -- </body> section and **Copy | Paste** the raw HTML into the Edit Signature box. Click on Apply and Click OK to close and save your new Signature. Finish closing the Preferences.

You can now test it by creating a new e-mail. Insert the Signature from the drop down menu and send the e-mail to yourself or a friend so you can be sure what it will look like upon delivery.

The HTML code did turn out much cleaner if the word wrap was turned off or

cleaned out. Somehow the style was affected by the carriage returns within.

Keep in mind when you do use HTML in ACT! it only recognizes the most elementary HTML codes. So keep it simple to insure a clean look.

ACT! via Web Browser

Q Do you know where to find step-by-step on how to set up and share an ACT! database online through a Web site between two users? I came across an add-on product but it seemed pricey at \$350 per year. Thanks

Goldgemz - posting on ACT user group

A Remote access has been possible but very soon you can use a browser access with the very latest evolution, ACT! Premium for the Web. It will be out late June 2005. It works in conjunction with ACT! 2005 Premium for Workgroups, looks just like the desktop version, just faster. Check out a full working demo at www.act.com/webdemo. Login as Chris Huffman. No password is required. Host it on your own server or at an out-sourced site. Either way, it is secure

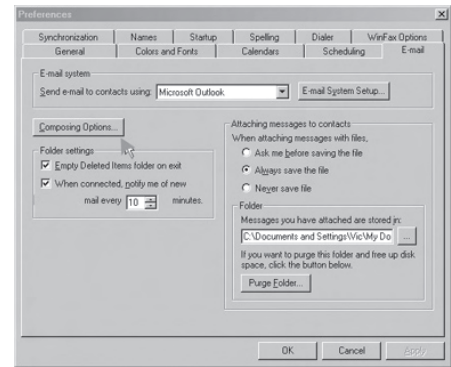


Figure 6 Composing Options

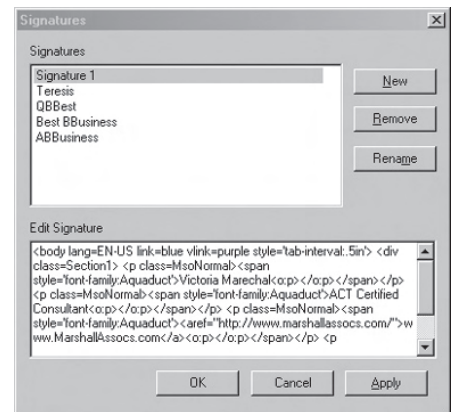


Figure 7 Set up Signature

because it sits behind the firewall. I understand layouts translate seamlessly. We will give you more information in a later issue. ♦

Business Development...

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your product or service is. Your reader will be turned off and your approach will fail.

Letter 3, sent to the same group a week after Letter 2, is all about customer testimonials. These quotes need to be directly related to you, your firm, or your product and should have some tie in with the subjects referenced in the previous two letters.

Phone calls 1 and 2 (comprising the 4th and 5th touch points) should be made the following week, on Tuesday

afternoon and Friday morning. My assumption is that you'll get voice mail; have a prepared phone prompter (not a script, because then you'll sound like you're reading a script), which hits the highlights of the business case your letters have made. Your voice mail message should not be longer than 30 seconds.

If, by the final phone call, you've not received ANY indication that they're interested in talking with you or have any need for your services, then your call should indicate that you will not be in touch with them again for a specific

period of time (could be 45 days, or 90 days, or until next quarter, etc.).

Table 1 is a suggested schedule for the FTP campaign. Each Group should consist of no more than 10 names (could be more than one name per company); it gets much too complex to manage more than 10 names as the weeks progress.

In the coming months, we'll talk about Trade Associations, networking, growing your own "rolodex," etc. Until then, happy dialing! ♦

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