# Welcome to ACT! ® Premium for Web 2005/ACT! Professional for Web 2005 (Beta)

Welcome to ACT!  $^{\circledR}$  Premium for Web 2005/ACT! Professional for Web 2005 from Best Software.



ACT! Premium for Web 2005/ACT! Professional for Web 2005 is referred to as ACT! Premium for Web in the United States and Canada and ACT! Professional for Web in other regions.

ACT! Premium for Web 2005 includes a server application and a Web client application. ACT! Premium for Web Server is installed on your Web server and lets the Administrator configure and set up access for the Web client users. ACT! closely resembles the look and feel of ACT! Premium for Workgroups 2005 (The latest ACT! for Windows release). You can support single or multiple users without the need to synchronize because updates are performed on your Web server whenever a change is made.

For more information about ACT! Premium for Web 2005, please visit our Web site at <a href="https://www.act.com">www.act.com</a>.

## **New features in ACT! Premium for Web 2005**

This version of ACT! Premium for Web 2005 has more than 50 new features and hundreds of enhancements, so it is nearly impossible to list them all. We recommend that you read the ACT! Premium for Web Server User's Guide and online Help and experiment with the software to discover all the ways you can use ACT! Premium for Web to increase your productivity and improve contact relationships. Some of the most significant enhancements include:

**New Company records** 

**More opportunity information** 

**Enhanced database synchronization** 

**Updated calendar views** 

**Customizable activities and priorities** 

**New contact Notes and History tabs** 

**Improved e-mail performance** 

Easily export to Microsoft® Excel®

**Enhanced groups and subgroups** 

**Tighter Microsoft® Outlook® Integration for ACT! Premium for Web Server users** 

Powerful, easier to use lookups

**Easily find and eliminate duplicate records** 

**Unlimited secondary contacts** 

**New activity series** 

**New reports** 

## How to use Help

Online Help provides a quick way to look up information as you use ACT! Premium for Web Server. You can view Help on your computer in any Window or dialog box. You can also access tooltips for tools.

The following types of Help are available in ACT! Premium for Web Server:

- **◆Feature overview** Information in the "About..." topics include everything you want to know about an ACT! Premium for Web Server feature.
- **How do I...?" Help** The "About..." topics provide a description of ACT! Premium for Web Server features, such as "How do I add a contact to the database."
- **Context-sensitive Help** For an active dialog box, press F1 to display its field definitions.
- **Expanding or drop-down Help** Some topics include bold, blue links. Click the link to display additional information about the topic. For example:

### Click this link for expanding help

#### Click this link for drop-down help

- **Examples and scenarios** Real-world scenarios and examples are included so you can find out how you might use a feature.
- **Troubleshooting** Some topics include troubleshooting tips or links to the ACT! Premium for Web Server Knowledge Base.
- **Notes, Tips, and Cautions** This type of help is indicated by the following graphics.



This signifies a caution.



This signifies a note.



This signifies a tip.

## To access Help from any window

• Click the **Help** menu, and then click **Help Topics**.

In the help table of contents, a book icon represents a collection of topics, and a document icon represents a single topic.

A plus (+) sign indicates that there are more topics. Click the plus sign to expand the list. (The plus sign will change to a minus (-) sign. Click the minus sign to

## collapse the list.)

# To access Help in a dialog box

• Press **F1** to display field definitions for the active dialog box.

## To display tooltips

• Hold your cursor over the tool to read the name of the tool.

# **About the ACT! Premium for Web Administration** tool

Before your users can access ACT! Premium for Web, you must specify your virtual directory and at least one ACT! database. You do this in the ACT! Premium for Web Administration tool. You can also use this tool to change or remove databases from ACT! Premium for Web Server.

#### To access the ACT! Premium for Web Administration tool

In ACT!, from the **Tools** menu, click **ACT! for Web Administration**.

## How do I...?

Specify a virtual directory and ACT! Premium database
Remove access to an ACT! Premium database

# **Related topics**

Configuring Internet Explorer to access ACT!
Accessing ACT!

## Specifying a virtual directory and ACT! database

When you installed ACT! Premium for Web Server, the installer created a virtual directory called act on your Web server. Users access ACT! Premium for Web using this virtual directory name appended to the URL of your Web server. For example, http://salesweb/act would be the name if salesweb is the Web server URL, and act is the virtual directory name. Using the following procedure, you assign one or more ACT! databases to this virtual directory, so that users will have a database to log on to when they access ACT! Premium for Web.

### To specify a virtual directory and ACT! Premium for Web database

1. From the **Virtual Server** list, select the name of your Web server.

A list of virtual directories available on your Web server appears in the Virtual directories box.

The box displays only virtual directories that are associated with an ACT! Premium for Web Server installation. In most cases, there is only one. However, in environments where you are hosting multiple installations of ACT! Premium for Web Server, the list may have more than one virtual directory. For more information on configuring this type of environment see the Securing ACT! Premium for Web Server Environments chapter in the ACT! Premium for Web Server Administrator's Guide.

- 2. In the **Virtual directories** box, select the virtual directory you want to configure.
- 3. Click **Add**, browse to the ACT! database you want to associate with your selected virtual directory, and then click **OK**.

You must have administrator rights in the ACT! database you add. If you are not currently logged on to the ACT! database you are adding, the administration tool prompts you to log on. Also, the database must not already be assigned to any virtual directory on your Web server.

## **Related topics**

Removing access to an ACT! database

# Removing access to an ACT! Premium for Web Server database

You can use the ACT! Premium for Web Server Administration tool to remove access to ACT! Premium for Web databases that you added previously.

#### To remove access to an ACT! database

- 1. From the **Virtual Server** list, select the name of your Web server. A list of virtual directories available on your Web server appears in the Virtual directories box.
- 2. In the **Virtual directories** box, select the virtual directory you want to configure.
- 3. Select the ACT! database you want remove access to, and then click **Remove**.

# **Configuring Internet Explorer to access ACT! Premium for Web**

Users access ACT! Premium for Web through Internet Explorer. While using ACT! Premium for Web, users will be unable to access the Internet Explorer View Source function and the right-click menu.

You must enable Internet Explorer to accept cookies, and you must specify certain browser security settings.

## **Configuring ActiveX security**

To use correspondence and word processing features, users must install two ActiveX controls:

- •**TX TextControl** This installs with ACT! Premium for Web Server and is part of the same security zone as ACT! Premium for Web Server. All users will be prompted to install this control.
- **Common Dialog** This is a Microsoft ActiveX control that some users may need to install. It is part of the Microsoft.com security zone.



For more information on security zones in Internet Explorer, see Help in Internet Explorer.

Default browser settings typically prompt users to install ActiveX controls. You can safely manage these ActiveX controls in one of two ways:

- •If your users maintain default browser settings, ACT! Premium for Web prompts them to install one or both of these ActiveX controls. You should inform them that it is safe to install these controls.
- If your client-side Web security policies disallow the installation of ActiveX controls, you may add both the domain associated with your ACT! Premium for Web Server installation and Microsoft.com to the Trusted Sites zone in Internet Explorer. Configure Internet Explorer to prompt users when installing ActiveX controls only for sites in the Trusted Sites zone. Doing this bypasses the ActiveX security constraints only for the necessary controls.

## **Accessing ACT! Premium for Web**

You must provide your users with an address for accessing ACT! Premium for Web. This address consists of the virtual directory name of your ACT! Premium for Web installation appended to your site URL.

#### Examples of URLs are:

- http://salesweb/act, where "salesweb" is your site URL, and "act" is the virtual directory name
- http://teamwebserver/act
- http://92.123.145.63/act
- http://www.salesperson.com/act

If you are on a common network, users can always access ACT! Premium for Web using the network machine name of the Web server. In the first two examples, that name is "salesweb" and "teamwebserver".

The last two examples feature external URLs as opposed to network machine names. Setting up external Internet access for your ACT! site requires additional configuration that is not covered in this online Help. Refer to Microsoft IIS Help or contact your network administrator or ISP for additional support.

# **About creating databases and managing files**

Administrator or Manager users can create a new database, save a copy of or duplicate a database. Administrator users can convert a previous ACT! database. When you create a new database, you can manually enter all contact information, or you can import contact records from another ACT! database or another program.

ACT! Premium for Web Server stores your data in one of three locations:

- Database
- **Database supplemental files**
- **Personal supplemental files**

## How do I...?

Create a database
Convert an existing database
Copy a database
Learn more about supplemental files

## **Creating databases**

#### To create a database

- 1. From the **File** menu, click **New Database**.
- 2. In the **New Database** dialog box, enter a name and location for the new database. Click the browse (...) button to browse to the location.
- 3. (Optional) To share the database, select the **Share this database with other users** check box.
- 4. Type a user name for the database.
- 5. (Optional) Type a password for the database.
- 6. Click **OK**.



If you are using MSDE (Microsoft SQL Server Desktop Engine), you should be aware of the size of your database so that you do not exceed the 2 GB limit.

For information about naming databases and acceptable file names, see <a href="Naming a database">Naming a database</a>.

# **Opening databases**

#### To open a specific database

- 1. From the **File** menu, click **Open Database**.
- 2. In the **Open** dialog box, select one of the existing databases to open or browse to one in a different location.
- 3. Click **Open**.

## To select a database to open by default

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Startup** tab, select **Last opened** to open the last opened database **or**

To specify the database, select **Named database**, and then click the browse button to locate the database.

## **About ACT! Premium for Web Server Preferences**

Preferences allow you to set up ACT! Premium for Web Server to accommodate your work style. You can set options to specify where to store personal files associated with ACT! Premium for Web Server and to customize name and salutation settings. You can set preferences to change the background colors and fonts for your calendars, lists, and other views. You can also set preferences to determine how contact names display, how you are notified of new e-mail messages, and so on.

You can also set preferences that are feature specific, such as choosing your default e-mail system or word processor. Information about setting up these preferences is given in topics that describe how to use the feature.

The Preferences dialog box includes the following tabs:

General

**Colors & Fonts** 

**Calendars & Scheduling** 

E-mail

Communication

**Startup** 

## How do I...?

Set preferences from the General tab
Set preferences from the Colors & Fonts tab
Set preferences from the Calendar & Scheduling tab
Set preferences from the E-mail tab
Set preferences from the Communication tab
Set preferences from the Startup tab

# **Checking for ACT! Premium for Web Server updates**

#### To automatically check for updates

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Startup** tab, select **Automatically check for updates**, and then select the length of time and measurement. For example, type 10 to indicate the length of time in days, weeks, or months.

#### To manually check for updates

- From the **Help** menu, click **ACT! Update**.
   If an update is available, a message appears at the bottom right of the screen.
- 2. Click the link to begin the download.

## **Converting an existing database**

Only an Administrator user can convert databases. For more information, see <u>About user roles and permissions</u>.

## To convert an existing database created in ACT! 3.x-6.x

- 1. Open ACT! Server, and then click **Open Database**.
- 2. In the **Open** dialog box, locate the folder that contains the database to be converted.
- 3. From the **Files of type** list, select **ACT! 3 6 Database (\*.DBF)**.
- 4. Select the database, and then click **Open**.
- 5. Click **OK** at the conversion message prompt.
- 6. If prompted, type your login ID and password, and then click **OK**.
- 7. Follow the instructions on the screens, clicking **Next** to advance. Press F1 for more help.



Once conversion is complete, you should back up and consider removing the earlier version from your computer.

## **About printing**

There are several options you can use to print information about contacts, groups, and companies. For example, you can quickly print the detail view for a specific contact, or you can filter information and select options to include on a calendar view.

When printing address books, calendars, reports, labels, and envelopes, you can specify which information you want to include by selecting the paper type and options. For instance, you can print a monthly calendar of all your meetings and calls on a Day Runner type calendar.

When printing information for contacts, groups, and companies, you can print the current view, including information on a selected tab; or you can print the information on a specific tab only.

You can print letters, memos, and faxes from the word processor, print an opportunity graph or pipeline, and print an e-mail message.

## How do I...?

Print address books, calendars, and reports
Print information for contacts, groups, and companies
Print documents, graphs, and e-mail messages

# Setting the option to display a country code in phone fields

You can set a general preference option to display the country code in phone fields for a contact and company.

## To set the option to display a country code in phone fields

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, in the **General preferences** box, select **Always display country code in phone fields**.
- 3. Click **Apply**.

# Setting the option to allow/disallow history editing

If you are a user with an Administrator or Manager role, you can set an option to allow or disallow the ability to edit history items.

## To set the option to allow/disallow history editing

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, in the **General preferences** box, do one of the following:
- To allow editing of history items, select **Allow history editing**.
- To disallow editing of history items, clear **Allow history editing**.
- 3. Click **Apply**.

# **Setting quote preferences**

## To set quote preferences

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, click **Quote Preferences**.
- 3. In the **Quote Preferences** dialog box, select **Prompt for quote number** when generating. For field definitions, press **F1**.
- 4. (Optional) In the **Quote prefix** field, type the prefix you want to use for quotes.
- 5. Click **OK** to save the settings, and then click **Apply**.

## **Setting storage locations for personal files**

You can set the storage location for personal files such as databases, documents, Internet links, and dictionaries.

## To set the location for a personal file

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, in the **Personal Files Locations** box, select a file type from the **File type** list.
- 3. In the **Location** field, type the location or click the **Browse** button to select the folder where the file type will be stored, and then click **OK**.
- 4. To set the location for another file type, select the file type from the **File type** list, and repeat step 3.
- 5. When you are finished with all file types, click **Apply**.

## **Customizing name prefixes and suffixes**

If you are a user with an Administrator or Manager role, you can customize the lists of contact first name prefixes, last name prefixes, and last name suffixes. These lists are then available to users when they add a contact to the database, or when creating a letter or sending an e-mail message.



Prefixes and suffixes are case- and punctuation-sensitive.

#### To customize the contact name prefix and suffix list

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, click the **Name Preferences** button.
- 3. In the **Name Preferences** box, select the **First Name Prefixes**, **Last Name Prefixes**, or **Last Name Suffixes** option to view the default prefixes or suffixes.
- 4. To add a new prefix or suffix, select the appropriate option, and then click **Add**.

#### To remove a prefix or suffix

Select the item from the appropriate list, and then click **Remove**.

# **Updating the salutation field**

You can update the salutation field to match the current default salutation setting. See <u>Setting the default salutation preference</u>.

## To update the salutation field

- 1. From the **Tools** menu, click **Update Salutation Field**.
- 2. In the **Update Salutation Field** dialog box, select one of the options. For field definitions, press **F1**.

# **Setting the default salutation preference**

You can set the salutation preference for a contact. This salutation is used when writing a letter or performing a mail merge.

## To set the default salutation preference

- 1. From the **Tools** menu, click **Preferences**.
- 2. From the **General** tab, in the **Names** box, click **Salutation Preferences**.
- 3. Select one of the options. For more help, press **F1** for field definitions.
- 4. Click **OK** to save the setting.

## **Enabling/disabling duplicate contact checking**

Users with an Administrator or Manager role can set a default option to enable or disable duplicate contact checking and select up to three default contact fields for matching. Once enabled, duplicate contact checking will notify users if a duplicate contact exists when adding a new contact, importing a contact, or merging a contact record attached to an e-mail message.

#### To enable/disable duplicate contact checking

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab, click **Duplicate Checking**.

  The Duplicate Checking dialog box opens. For field definitions, press F1.
- 3. Select one or more contact fields for matching.
- 4. To enable duplicate checking in the database, select **Enable duplicate checking in the database**. To disable, clear this option.
- 5. Click **OK** to save the settings, and then click **Apply**.

# Customizing colors and fonts for lists, tabs, and calendars

You can set the colors and fonts for lists, tabs, and calendars, but you must set the colors and fonts for each item separately.

#### To set colors and fonts

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Colors & Fonts** tab, select an item to customize from the **Customize** list.
- 3. Click the **Font** button.
- 4. In the **Font** dialog box, select the font, style, and size of the font. For field definitions, press **F1**.
- 5. (Optional) From the **Script** list, select the script to use.
- 6. Click **OK**.
- 7. In the **Font** dialog box, select the text color and background color.
- 8. To set the font for another item, select the item from the **Customize** list, and repeat steps 3 7.

# Showing grid lines for lists, tabs, and calendars

You can set the grid lines for lists, tabs, and calendars. For more information about selecting multiple items, see <u>Selecting more than one name or item</u>.

### To show grid lines

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Colors & Fonts** tab, select an item to customize from the **Customize** list.
- 3. Select **Show grid lines**.
- 4. To set grid lines for another view, select the item from the **Customize** list, and repeat step 3.

## **Setting preferences for calendars**

You can set preferences to customize calendar views and to set default options for your calendar. The Calendar Preferences dialog box contains all the settings to customize your calendar views.

#### To set calendar preferences

- 1. From the **Tools** menu, select **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Calendar Preferences** button.

The Calendar Preferences dialog box opens. For field definitions, press F1.

- 3. From the **Calendar work days** box:
- a. Select the days of your work week.
- b. Select the start and end time for your daily schedule.
- 4. From the **Calendar increments** box:
- a. In the **Daily calendar** list, select the amount of time you want your daily calendar to increment by. For example, to display hourly increments, select 60 minutes.
- b. From the **Work week calendar** list, select the amount of time you want your work week calendar to increment by.
- 5. From the **Calendar options** box:
- a. In the **First day of the week** list, select the day you want to display as the first day of your week. For example, select Wednesday to make Wednesday the first day of your week.
- b. From the **First week of the year** list, select the first week of the year.
- c. From the **On calendars show** list, select an option for displaying contact or company names on the calendar.
- d. From the **Enable pop-ups for** list, select the areas for which you want pop-ups. Pop-ups shows basic activity details and indicate whether the activity is recurring, has an alarm, or is private. You can select pop-ups for the Activity Tab, Task List, and/or Calendar.
- 6. To display only the current month when viewing the Mini-calendar, select **When displaying Mini-calendar, show only current month**.
- 7. To display activities you accepted as tentative on your calendar, select **Show tentative activities on my calendar**.
- 8. From the Show full day banner list, select the minimum duration of

- activities for which you want to show a full day banner. For example, select 1 Day to have a banner display automatically on activities lasting one day or more.
- 9. To display events on your calendar, select **Display events**. When selected, this option displays events that are created for all users through Manage Events.
- 10. To compress weekends into one space on the calendar, select **Compress** weekends on monthly calendar, and then click **OK** to save the settings.

## **Setting scheduling preferences for activities**

You can set preferences for default options when scheduling activities. You can customize activity appearance, customize the alarm, and set other default options.



When actually scheduling an activity, you can change any of the default options.

### To set scheduling preferences for activities

- 1. From the **Tools** menu, select **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Scheduling Preferences** button to open the **Scheduling Preferences** dialog box. For more help, press **F1**.
- 3. In the **Activity type settings** area, <u>set activity type options</u>.
- 4. To <u>customize the alarm sound for activities</u>, click **Customize Alarms**, and then set the audio notification sound.
- 5. To <u>set the appearance for cleared activities</u>, in the **When clearing activities** field, select an option.
- 6. To <u>enable conflict checking</u> when scheduling an activity, select **Enable activity conflict checking**.
- 7. To make new activities public when creating a new activity, select **Make new activities public**.
- 8. To create separate activities for each contact scheduled for an activity, select **Create separate activities when scheduling with multiple contacts**.
- 9. To receive a schedule activity prompt when a new contact is created, select **Prompt to schedule an activity when a new contact is created**, and then click **OK** to save the settings.

## Setting default options for each activity type

You can set personal preferences for each activity type. If desired, you can select all the activity types and set the default preferences at one time.



- Activity types that have reserved resources and activities with multiple users will not automatically roll over.
- When actually scheduling an activity, you can change any of the default options.

### To set options for an activity type

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Scheduling Preferences** button.
- 3. In the **Activity type settings** box, select the activity type.

or

To select one or more activity types, click the first activity type, hold the Shift key and select all the activity types.

- 4. From the **Priority** list, select the priority level you want to display automatically when the activity type is scheduled.
- 5. (Optional) Select **Default to timeless** to automatically set the activity type as timeless.
- 6. From the **Ring Alarm** list, select how long before the activity you want the alarm to ring.
- 7. (Optional) Select **Automatically roll over to today** to automatically roll over activities.
- 8. From the **Duration** list, select the duration for the activity type.
- 9. In the **Automatically display drop-downs for these fields** field, select the fields for which you want to display drop-downs for the activity type.
- 10. When all activity type settings are complete, click **OK**.

### **Customizing the alarm for an activity**

You can customize the alarm audio notification for an activity.

### To customize the alarm for an activity

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Scheduling Preferences** button.

The Scheduling Preferences dialog box opens.

- 3. Click the **Customize Alarms** button.
  - The Customize Alarm dialog box opens. For field definitions, press F1.
- 4. In the **Audio notification** area, select **Play sound**, and then do one of the following:
- To hear a system beep for an activity, select **System beep for** and set the number of seconds the beep will sound.
- To hear a custom WAV sound, select **Custom wav file**, set the number of times for the WAV file to play, and type the location of the WAV file or click **Browse** to locate the file.
- 5. Click **OK**.

## Changing the appearance of cleared activities

You can set a personal preference for changing the appearance of cleared activities. This setting makes cleared activities easier to notice in a list of activities.

#### To change the appearance of cleared activities

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Scheduling Preferences** button.
- 3. In the lower portion of the **Scheduling Preferences** dialog box, in the **When clearing activities** box, select **Strikeout** to have a line drawn through the text of the cleared activity.

or

Select **Gray** to have the text appear gray for the cleared activity.

4. Click OK.

# **Enabling activity conflict checking**

Activity conflict checking notifies you if an existing activity conflicts with a new activity you are scheduling.

### To enable activity conflict checking

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Calendar & Scheduling** tab, and then click the **Scheduling Preferences** button.
  - The Scheduling Preferences dialog box opens. For field definitions, press F1.
- 3. Select **Enable activity conflict checking**, and then click **OK**.

### **Setting e-mail preferences**

#### To set e-mail preferences

- 1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab. For field definitions, press **F1**.
- 2. Do one or more of the following:
- To select your default e-mail system, in the **Send e-mail to contacts using** box, select one of the e-mail systems you have installed.
- To set up an e-mail system, click E-mail System Setup, and then follow the instructions on the wizard.
- To specify message settings and create or modify signatures, click <u>Composing Options</u>.
- Select other e-mail options regarding attachments and folders.
- 3. Click **Apply** to save your settings, and then click **OK**.

### **Setting e-mail composing options**

E-mail composing options include defining how new e-mail messages will look, setting default options for priority and requesting a return receipt; setting auto-fill name suggestion; selecting a default signature text; and setting e-mail addressing and name resolution options.

### To set e-mail composing options

- 1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
- 2. Click the **Composing Options** button.
- 3. Select options as needed. For field definitions, press **F1**.
- 4. Click **OK**.

### **Specifying your word processor**

Choose the word processing software you want to use with ACT! Premium for Web Server.



If you choose Microsoft Word as your word processor, you must change the macros security level in Word before running the program with ACT! Premium for Web Server.

#### To select your word processor in Preferences

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Communication** tab.
- 3. In the **Word Processor** list, select the word processor you want to use.
- 4. Click **OK**.

#### To select your word processor from the Getting Started Wizard

- 1. From the **Help** menu, click **Getting Started Wizard**.
- 2. Click **Next** to advance to the **Word Processor** panel.
- 3. From the **Word processor** list, select a default word processor.
- 4. Complete the remaining wizard panels as needed, and then click **Finish**.

# Setting up your fax software for use with ACT! Premium for Web Server

Before you can take advantage of ACT! Premium for Web Server's faxing tools, you must identify the fax software you have installed.

### To set up your fax software for use with ACT! Premium for Web Server

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Communication** tab.
- 3. Under **Default application**, in the **Fax software** list, click the fax software you want to use with ACT! Premium for Web Server.
  - The Fax software list displays all fax software products installed on your system that are recognized by ACT! Premium for Web Server. If the list displays None, you do not have a compatible fax application installed.
- 4. To review or configure your fax settings, click **Fax Options**. ACT! Premium for Web Server displays the options dialog box for the fax software you have installed. For more information about the fax features and options available to you, see your fax software documentation.
- 5. After adjusting your fax settings, close the fax options dialog box.
- 6. Click **OK** to save and close the **Preferences** dialog box.

## **Setting spelling preferences**

You can set your spelling preferences to initiate a spelling check automatically each time you create or edit an activity, history item, note, or opportunity. You can enable the auto-suggestion feature, select and modify dictionaries, and choose types of words to ignore.

### To set spelling preferences

- 1. From the **Tools** menu, click **Preferences**, and then click the **Communication** tab.
- 2. Click the **Spelling Preferences** button.
- 3. Select options as needed. For field definitions, press **F1**.
- 4. Click **OK**.

# **Setting Quick Print preferences**

Quick Print preferences allow you to choose the content and layout of printouts.

### **To set Quick Print preferences**

- 1. From the **Tools** menu, click **Preferences**, and then click the **Communication** tab.
- 2. Click **Quick Print Preferences** to specify header and footer settings. For field definitions, press **F1**.
- 3. Click **OK**.

## **Setting startup preferences**

### To set startup preferences

- 1. From the **Tools** menu, click **Preferences**.
- 2. In the **Preferences** dialog box, click the **Startup** tab. Press F1 for more help.

You can apply one, or all of the following startup preferences:

- Make new contacts public, private, or limited access
- Make new groups and opportunities public or private
- Automatically link new contacts to their company record
- Specify which database to open upon startup
- Automatically check for ACT! Premium for Web Server updates
- 3. When you finish selecting your startup preferences, click **OK**.

# Setting options for contact, group, and opportunity records

#### To set options for contact, group, and opportunity records

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **Startup** tab.
- 3. In the Make new contacts field, select Public, Private, or Limited Access.
- 4. In the **Make new groups** field, select **Public** or **Private**.
- 5. In the **Make new opportunities** field, select **Public** or **Private**.
- 6. To link new contacts to their company record, select **Automatically link new contacts to their company record**.
- 7. To have views open in separate windows, select **Open each view in its own window**.

### **About conversion**

You can convert databases, as well as supplemental files such as layouts, templates, etc., used in previous versions of ACT!. When converting databases, you can use any ACT! 3.x to 6.x database. You can use both ACT! 3.x-6.x and ACT! 7.x on the same machine, but once you convert the database, you will not be able to save data back to the previous database. For more information about conversion, see <u>Conversion considerations</u>.

There are two types of database conversion:

#### Standard

#### **Custom**



When mapping secondary contacts, a secondary contact is created if any of the fields being mapped contain data (i.e., mapping a contact's Company field produces secondary contacts with only the company name filled in, even if there is no other secondary contact data for that contact).

You may want to complete the following tasks before beginning your database conversion:

- •Delete obsolete data in the prior ACT! database. See "About database maintenance" in the online Help in the prior version.
- Compress and re-index the prior ACT! database. See "About database maintenance" in the online Help in the prior version.
- Back up the prior ACT! database.
- •To speed up the conversion process and avoid errors, turn off screen savers and close all other applications.

When database conversion is complete, you have the option of converting supplemental files as well. See <u>Converting supplemental files</u> for more information.

### How do I...?

Convert a database
Convert supplemental files

### **Conversion considerations**

Before completing database or supplemental file conversion, note the following considerations.

#### **Database conversion:**

- •ACT! v7 conversion works on ACT! 3.x to 6.x databases (\*.dbf).
- Conversion uses a COPY of the original database.
- Conversion places the newly created database locally.
- •You must be an Administrator user in the previous version database to convert it.
- Converting a database increases the database size.

#### **Converted data details:**

- •All contact (including users) and group records convert.
- •All notes, histories, opportunities, and activities convert.
- All schema (database tables and fields) convert.
- All group members convert as static members. This means that if you had a group whose membership was based upon a group rule, that criteria is not converted.
- An existing opportunity process converts as a Previous ACT! Sales Process.
- Existing opportunities without a sales stage or probability convert as a New Opportunity stage and 100% probability.
- In ACT! v6.x or prior, if you store multiple e-mail addresses for a contact, ACT! v7 will convert those addresses to new fields, but the new fields will not be visible on converted layouts or layouts included with ACT! v7. The fields are visible in the Define Fields list and can be added to the layouts.
- Date fields and time fields in prior versions are stored as literal values. ACT! v7 stores date and time fields as Greenwich Mean Time (GMT). If you have multiple databases, we recommend that you convert the database in the "home" time zone.
- A private subgroup with a different record manager than the parent group converts to a private parent group.
- •A private subgroup of a public group converts to a public group.
- Existing ACT! 6.0 accounting links automatically convert to ACT! v7.

### **Supplemental file conversion:**

On converted layouts, some labels may display as wrapped text. You may

want to edit these labels using the Layout Designer. See "Customizing Fields and Layouts" in the User's Guide for more information.

•The supplemental file system does not count as part of the MSDE 2 GB limit. The supplemental file system storage has changed in ACT! v7. Supplemental files are specific to a database, accessible to users sharing a database, and stored with the database. All are backed up and restored as part of the database. Supplemental files can be synchronized.

#### Items that do not convert:

- Activity series
- Group rules
- Menu/toolbar customizations
- ◆Saved reports (RPT files)
- Synchronization settings Outlook activities updated into ACT!
- •Macros
- Queries
- Some preferences

### **Converting supplemental files**

Supplemental files include report templates, documents, e-mail templates, Microsoft Word and ACT! Word Processing templates, layouts, labels, and envelopes. You can convert supplemental files during database conversion, but if you choose not to, you can use the Tools menu at any time to convert the files. For more information, see <a href="Learning more about supplemental files">Learning more about supplemental files</a>.



Database supplemental files are shared by all users in the database. Personal supplemental files are not shared.

#### To convert supplemental files

- 1. From the **Tools** menu, click **Convert ACT! 3.0 6.0 Items**.
- 2. From the **Select a Conversion Task** screen, select an item to convert.
- 3. Follow the instructions on each screen, clicking **Next** to advance. Press F1 for more help.

### **About contacts**

A *contact* is a customer, business associate, friend, or anyone that you want to maintain a relationship with and keep details about. A contact record consists of information about your contact, such as a name, address, phone number, e-mail address, and so on, and is stored in the ACT! Premium for Web Server database. Everything you do in ACT! Premium for Web Server relates to a contact.

When you first open your ACT! Premium for Web Server database, you will see the Contact Detail window. From this window, you can add, edit, or delete contacts; look up contact information; use the contact tabs to add notes, view history, schedule activities, add documents, and so on. The Contact Detail window contains fields and layouts that can be customized to fit your needs. You can also add secondary contacts from this window. For more information, see <a href="Adding and deleting secondary contacts">Adding and deleting secondary contacts</a>.



A contact can be a member of multiple groups and companies, but can only be linked to one company.

The Contact Detail window also contains the View Groups/Companies navigator button. Click this button to easily display the contacts in the selected Group/Subgroup/Company/Division.

### How do I...?

Work with contacts
Attach files to a contact record
Customize name and salutation settings
Work with fields and layouts

# **Related Topics**

About companies
About groups

# **Navigating through the Contact Detail window**

Use the TAB key to move through fields sequentially, or press ENTER to move between the most commonly used fields. You can customize the order in which the cursor moves from field to field by using the layout designer.

#### To move from field to field

When you finish typing or selecting information in a field, press the **TAB** key to advance to the next field.

#### To move to common fields

When you finish typing or selecting information in a field, press **ENTER** to advance to the next commonly used field.

To customize the order that the cursor moves from field to field, see <u>Customizing field entry order</u>.

# **Selecting layouts**

### To select a layout for contacts, groups, and companies

- 1. From the **Contact, Group,** or **Company Detail** window, click the **Layout** button located at the bottom of the navigation bar.
- 2. From the list of layout designs, click the layout you want to display.

### **Adding and deleting contacts**

Depending on your user role, you can add and/or delete contact records. For more information, see <u>About user roles and permissions</u>.

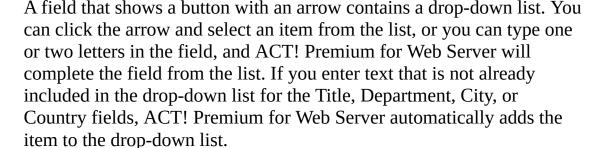
#### To add a contact

- On the toolbar, click the **New Contact** icon.
   A blank contact record appears.
- 2. <u>Enter the contact information in the fields</u>. Depending on the field, you can type the information or select from a list.



Make sure that ACT! correctly identifies the contact's first and last name, as well as any title. ACT! Premium for Web Server uses the title and names in the salutation when you write letters. You can specify how ACT! Premium for Web Server does this by setting name preferences on the General tab in the Preferences dialog box.

- 3. (Optional) In the **Contact** field, click the browse (...) button to edit contact name details.
- 4. (Optional) In the **Phone** and **Fax** fields, click the browse (...) button to display a dialog box where you can format telephone numbers.





The contact record is automatically saved when you move to another record or perform another action.

#### To delete a contact

1. Display the contact record that you want to delete.

or

From the **Contact List** window, select the contact.

- 2. From the **Contacts** menu, select **Delete Contact**.
- 3. At the warning message, you can:
- Click **Delete Contact** to confirm the deletion.

- Click **Delete Lookup** to delete the entire lookup, and then click **Yes** to confirm the deletion.
- Click **Cancel** to cancel the deletion.

### **Entering basic contact information**

You enter contact information by typing it into the fields or selecting information from drop-down lists. In some fields (such as ID/Status) with drop-down lists, if you type the first few letters of an item, the field will fill with the item that matches what you type.

The following list includes the fields in the Contact window and explains the type of information you can enter.

**Address** 

**Birthday** 

**City** 

**Company** 

**Contact** 

**Country** 

**Department** 

**Edit Date** 

E-mail

**Fax** 

**ID/Status** 

**Last Attempt** 

**Last Meeting** 

**Last Reach** 

**Last Results** 

**Messenger ID** 

Phones (Standard, Mobile)

**Referred By** 

**Salutation** 

**Spouse** 

**State** 

Title

Web site

**ZIP Code (Postcode)** 

# **Entering and changing e-mail addresses**

#### To enter an address in the E-mail Address field

- 1. Display the contact record for the e-mail address you want to enter.
- 2. Type the e-mail address in the **E-mail** field.

#### To change an address in the E-mail field

Press **TAB** to move to the E-mail field, or without clicking, rest the pointer over the field for a few seconds until it changes to an I-beam, and then click in the field and make the change.

### **Verifying contact names**

#### To verify first and last names

- 1. Click in the **Contact** field, and then click the ellipses (...) button to the right of the field.
- 2. If the first or last name is incorrect In the **Contact Name** dialog box, select the correct name from the list.



You cannot edit the first or last name in this dialog box. Press F1 for field definitions.

### To turn on the automatic display of the Contact Name dialog box



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

- 1. From the **Tools** menu, click **Preferences**.
- 2. In the **Preferences** dialog box, click the **General** tab, and then click the **Name Preferences** button.
- 3. From the **Name Preferences** dialog box, check the **Automatically Show Contact Name Definition** check box, and then click **OK**.

## **Entering phone number formats**

#### To specify phone number formatting by country

- 1. Click in the **Phone** field.
- 2. Click the browse button on the right of the **Phone** field.
- 3. In the **Enter Phone Number** dialog box, select a country from the **Country** list.
- 4. In the **Format** field, select a format from the list.
- 5. Type the phone number in the **Phone Number** field, and then click **OK**.
- 6. (Optional) Click the **Edit Formats** button to edit existing phone formats, or to add new formats.

For field definitions, press F1.



You can only set one default format per country, but you can set any number of formats per country. For countries with more than one phone format, select Free Form.

### **Entering annual event dates**



You must create annual event fields to enter annual event dates. For more information, see <u>About annual events</u>.

#### To enter an annual event date

- 1. Display the contact record for whom you want to enter a date.
- 2. In the annual event field, type a date (for example, 01/01/2003) or use the drop-down calendar to select a date. If you do not enter a year, the current year is entered automatically.

### **Editing contact records**

#### To edit a contact record

1. Find the contact record that you want to edit.



You can perform a lookup to find the contact record, or select a record from the Contact List.

- 2. Move the cursor to the field that you want to update.
- 3. Select the data that you want to replace, and then type the new data or delete the data.

The change is saved automatically when you move out of the contact record. You can also click the **Save** icon on the toolbar to save the record.



Undo your last change by choosing Undo from the Edit menu. To undo all changes to the contact record, choose Undo Changes to Contact from the Edit menu before the contact record is saved.

#### To edit multiple contact records

- 1. In the **Contact Detail** window, perform a lookup to find the contacts whose records you want to update.
- From the **Edit** menu, click **Replace Field**.The Replace Data window appears with empty fields.
- 3. In the **Replace contents of** field, select a field from the list.
- 4. In the **Value** field, select an item from the list or type the new or changed information, and then click **OK**.



All contacts in the current lookup are affected by this procedure. If the process takes too long and you need to cancel it, press the ESC key. Changes that have been made will remain in effect.

5. Click **Yes** to confirm your selection.

### **Duplicating contact records**

#### To create a duplicate contact

- 1. From the **Contacts** menu, click **Duplicate Contact**.
- 2. From the **Duplicate Contact** dialog box, select the **Duplicate data from primary fields** option or the **Duplicate data from all fields** option, and then click **OK**. Press **F1** for more information.

A new contact record appears, including the information copied from the original contact record.

To check the current primary fields and set other fields as primary fields, see Editing a field.

# Adding contacts when scheduling an activity

### To add a contact when scheduling an activity

- 1. <u>Schedule</u> an activity. In the **General** tab, click the **Contacts** button, and then select **New Contact**.
  - The New Contact dialog box appears. For field definitions, press F1.
- 2. Enter the contact information, and then click **OK**. The contact's name appears in the With field of the Schedule Activity dialog box.

# **Creating contacts from companies**

#### To create a contact from a company

- 1. Display the Company Detail window from which you want to create a contact.
- 2. From the **Groups** menu, point to **Companies**, and then click **Create Contact from Company**.
  - The Contact Detail window appears with some fields completed, and the original company is listed in the Company field.
- 3. Complete the necessary fields.

# **Attaching files to contact records**

### To attach a file to a contact record

- 1. Display the contact in the **Contact Detail** window.
- 2. From the **Contacts** menu, click **Attach File**.
- 3. In the **Attach File** dialog box, locate the file, and then click **Open**.

The History tab now shows that there is an attachment for the contact record.

# **Deleting attached files from contact records**

#### To delete a file from a contact record

- 1. Display the contact in the **Contact Detail** window.
- 2. Click the **History** tab at the bottom of the Contact window.
- 3. Select the attachment(s) by clicking its icon.
- 4. Right-click, and then choose **Delete Selected** from the shortcut menu.
- 5. Click **OK** to confirm the deletion.

## **Printing an address book of contacts**

#### To print an address book of your contacts

- From the **File** menu, click **Print**.
   The Print dialog box appears. For field definitions, press F1.
- 2. From the **Printout Type** list, click **Address Book**.
- 3. From the **Paper Type** list, select the paper type you want to use to print the address book.
- 4. To preview the address book, select **Enable Preview**. A preview of the selected printout appears in the Preview box.
- 5. (Optional) Set options to use in an address book.
- 6. Click **Print**.

### Printing contact, group, and company information

#### To print contact, group, and company information

- 1. Display the contact, group, or company view that you want to print. For information on locating a specific contact, group, or company, see <u>About finding contacts and contact information</u>.
- 2. If you want to include information from a specific tab, click the tab.
- 3. From the toolbar, click the **Quick Print** button.
- 4. On the **Print** dialog box, click **OK**.

### To print information from a specific tab only

- 1. Display the contact, group, or company view that you want to print. For information on locating a specific contact, group, or company, see <u>About finding contacts and contact information</u>.
- 2. Click the tab you want to print.
- 3. From the right-click shortcut menu, click the print option.
  - The name of the print option depends on which tab you selected. For example, if you want to print information from the Notes tab, select Print Notes. If you want to print information from the Activities tab, select Print Activities. However, you cannot print a list of documents from the Documents tab.
- 4. On the **Print** dialog box, click **OK**.
- You can also print reports that contain contact information. For more information, see <u>About reports</u>.

# **Displaying the Contact List**

## To display the Contact List

**◆**From the toolbar, click the **Contact List** icon.

or

From the **View** menu, click **Contact List.** 

# Working with notes for a contact, company, or group

You can insert a note, attach a file to a note, associate the note with a group or company, make the note private, edit a note's details, remove an attachment from a note, and delete a note.

To insert a note to a contact, company, or group

To attach a file to a note

To associate the note with a group or company

To make a note private

To edit a note's details

To remove an attachment from a note

To delete a note from a contact, company, or group

# Replacing data with another value

You can replace the contents of a field with another value. This operation modifies all records in the current lookup, so before performing it, create a lookup of the contact, group, or company records you want to modify. For example, the ZIP Code for a city has been changed, and you need to make the change in several contact records.



The Replace Field function changes all data in a lookup. This can cause data loss so you should back up the database before using Replace Field.

#### To replace data with another value

- 1. Create a lookup.
- 2. From the **Edit** menu, select **Replace Field**.
- 3. In the **Replace Data** dialog box, in the **Replace contents of** field, select a field from the list.
- 4. In the **Value** field, depending upon the field you selected in Step 3, select a value from the list or type a value, and then click **OK**.
- 5. At the confirmation message box, click **Yes**.

# Swapping data from one field to another field

You can swap the contents of a field to another field. This operation modifies all records in the current lookup, so before performing it, create a lookup of the contact, group, or company records you want to modify.



- If the size of the source field is greater than the size of the target field, some data loss may occur.
- Back up your database before using the Swap Field function. This function changes all data in a lookup, and can cause data loss.

#### To swap data from one field to another field

- 1. Create a lookup.
- 2. From the **Edit** menu, select **Swap Field**.
- 3. In the **Swap Data** dialog box, in the **Swap contents of** field, select a field from the list.
- 4. In the **With contents of** field, select a field from the list, and then click **OK**.
- 5. At the confirmation message box, click **Yes**.

# Copying data from one field to another field

You can copy the contents of a field to another field. This operation modifies all records in the current lookup, so before performing it, create a lookup of the contact, group, or company records you want to modify.



- If the size of the source field is greater than the size of the target field, some data loss may occur.
- Back up your database before using the Copy Field function. This function changes all data in a lookup. This can cause data loss.

#### To copy data from one field to another field

- 1. Create a lookup.
- 2. From the **Edit** menu, select **Copy Field**.
- 3. In the **Copy Data** dialog box, in the **Copy contents of** field, select a field from the list.
- 4. In the **To** field, select a field from the list, and then click **OK**.
- 5. At the confirmation message box, click **Yes**.

# **About finding contacts and contact information**

Finding contacts can be as simple as searching by first name, or sophisticated as searching for all contacts in the western region of the United States who purchased more than 100 units of your product in the last six months.

You can find contacts and contact information in one of the following ways:

- **Lookups**
- **Keyword Searches**
- **C**ontact List
- **Queries**

## How do I...?

Use lookups
Perform a keyword search
Perform an advanced query

# **Related Topics**

Looking up opportunities

Looking up groups

Looking up companies

Looking up last data synchronized

Looking up a Sync Set

Saving a lookup as a group

Saving a lookup as a company

#### **About the Contact List**

You use the Contact List to find contacts, tag contacts to create lookups, select contacts to send a letter to or invite to a meeting, create a new contact record, delete a contact, and perform other tasks.

You can sort the Contact List and customize the columns to fit your needs.

Occasionally, you may need a list of contacts who do not share identical information. For example, you might need to select clients, prospects, and friends from the Contact List and send them a letter using mail merge.

The Contact List window also contains the View Groups/Companies navigator button. Click this button to easily display the members of a group or company for viewing.

## How do I...?

**Use the Contact List Customize columns** 

# **Related Topics**

About the Company List
About the Group List

# **Using tag mode in the Contact List**

You can *tag*, or mark, contacts to create a lookup of contacts manually. For example, if you want to send an e-mail to some of your clients and your friends, a general lookup may not produce a list of those contacts since they do not share all of the same information required to generate the lookup. Instead, you could tag those contacts, and then send the e-mail using the lookup of tagged contacts.

#### To tag contacts

- 1. From the **Contact List**, click the **Enable Tag Mode** checkbox.
- 2. Select the contacts to tag. To tag all contacts in the Contact List, click **Tag All**.

#### To untag contacts

Click a tagged contact to untag, or click **Untag All** to untag all tagged contacts.

#### To omit tagged contacts

- 1. From the **Contact List**, click the **Enable Tag Mode** checkbox.
- 2. Tag the contacts you want to remove from the Contact List, and then click **Omit Selected**.

#### To create a lookup of tagged contacts

- 1. In the **Contact List**, click the **Enable Tag Mode** check box.
- 2. Tag the contacts to include in the Lookup, and then click **Lookup Selected**.

# **Finding contacts using the Contact List**

#### To find a contact using the Contact List

- 1. Click the column heading in which you want to search. For example, to find a contact by company name, click the **Company** column heading.
- 2. In the **Look for** field above the **Contact List**, start typing the information you want to find, such as the contact name.
  - As soon as you begin typing, the closest match is located.
- 3. Continue typing as necessary to get the correct match.

# **Looking up contacts**

#### To look up contacts

- 1. From the **Lookup** menu, select one of the contact commands. For more information about the contact commands and the types of results, see <u>Commands in the Lookup menu</u>.
- If you select All Contacts, the results immediately appear in the Contact List window, and you do not need to follow the remaining steps.
- 2. (Optional) In the **Look in this field** box, from the list, select the field on which to search.

The list shows all fields that you can search in the database.



- Look up the contact's full name by selecting Contact from the list, and then typing the full name in the Search For text box.
- 3. In the **Search For** box, type the word to search for or select a word from the list.
  - For example, to find all contacts in Amsterdam, select City from the Lookup menu and type Amsterdam. You can enter just the first few characters. For example, you can type "Ams", and ACT! Premium for Web Server will fill in Amsterdam. You can also choose an item from a dropdown list.
- In the For the current lookup area, select the Replace Lookup option, and then select the Include Private Contacts and/or Include Users check boxes.
- 5. Click OK.

The new set of contacts replaces the previously found set of contacts. For example, if you use the State command to find all contacts in Texas, and then use the City command to find all contacts in London, your Texas contacts are no longer in the current lookup; only your London contacts are in the current lookup.

# **Looking up contact activity**

You can create a lookup of contacts based on the last time a record was modified. You do this by looking up contacts that were or were not changed since a specific date. You can also limit the search by activity or history type.

#### To look up contact activity

- 1. From the **Lookup** menu, select **Contact Activity**.
- 2. In the **Contact Activity** dialog box, select the **Not Changed** or **Changed** option.
- 3. Type a date to start searching from, or click the down arrow to display a calendar and select a date.
- 4. In the **Search In** box, select options to narrow your search. ACT! Premium for Web Server will search for the selected field or activity that was or was not changed since the specified date, and then click **OK**.

# **Commands in the Lookup menu**

Command	Subcommand	Result
My Record		Finds your contact record. See <u>Looking up</u> my record.
All Contacts		Finds every contact record that you have access to. See <u>Looking up contacts</u> .
Contact		Finds all contacts whose records contain a specified value.
Company		Finds all contact records that match the Company criterion that you specify.
First Name		Finds all contact records that match the First Name criterion that you specify.
Last Name		Finds all contact records that match the Last Name criterion that you specify.
Phone		Finds all contact records that match the Phone criterion that you specify.
City		Finds all contact records that match the City criterion that you specify.
		Finds all contact

State		records that match the State criterion that you specify.
ID/Status		Finds all contact records that match the ID/Status criterion that you specify.
E-mail Address		Finds all contact records that match the e-mail address criterion that you specify.
Other Fields		Finds all contact records that match the criterion that you specify for the field you select. You can search in any field in the Contact window (including the full contact name); all fields in the User Fields, Home Address, and Secondary Contacts tabs; and many fields in the Contact Info tab.
Groups	All Groups	Finds all groups and opens the Group List window. See <u>Looking</u> up groups.
	Name	Finds all groups that match the name you specify.
	Other Fields	Finds all groups that match the field and criterion you specify.
		Allows you to save

	Save Lookup as Group	lookup results as new group.
Companies	All Companies	Finds all companies. See Looking up companies.
	Name	Finds all companies that match the name you specify.
	Main Phone	Finds all companies that match the main phone number you specify.
	City	Finds all companies that match the city you specify.
	State	Finds all companies that match the state you specify.
	ZIP Code	Finds all companies that match the ZIP Code you specify.
	ID/Status	Finds all companies that match the ID/status criterion you specify.
	Other Fields	Finds all companies that match the field and criterion you specify.
	Save Lookup as Company	Allows you to save lookup results as a new company.
Opportunities	All Opportunities	Finds all opportunities and opens the Opportunity List window.
		Finds all opportunities

	Name	that match the name criterion you specify.
	Stage	Finds all opportunities that match the stage criterion you specify.
	Product	Finds all opportunities that match the product criterion you specify.
	Total	Finds all opportunities that match the opportunity field and criterion you specify.
	Status	Finds all opportunities that match the status criterion you specify.
	Record Manager	Finds all opportunities that match the specified Record Manager.
	Other Fields	Finds all opportunities that match the field and criterion you specify.
Keyword Search		Finds all contacts whose records contain a word or words that you specify. See Finding contacts, companies, or groups using keywords.
Annual Events		Finds all contacts whose records contain an annual event for specified dates or date range. See Looking up annual events.
Previous		Replaces the currently found set of records

		with the previously found set of records.
By Example		Finds contact, company, or group records that match the criteria specified. See Looking up by example.
Contact Activity		Finds contacts that have or have not been modified within a specified date range and for specified criteria.  See Looking up contact activity.
Advanced	Advanced Query	Finds contact or opportunity records according to the query criteria, operators, and values you specify. See <a href="Creating an advanced">Creating an advanced</a> query.
	Users	Opens the Contact List containing all ACT! Premium for Web Server users' records.
	Last Synchronized	Finds all contact records that were included in the last sync session or within a data range. See Looking up last data synchronized.
	Sync Set	Finds all contact records included in a selected Sync Set. This also includes records added to the Sync Set

by subscription. See Looking up a Sync Set.

# **Saving and reusing queries**

#### To save a query

- 1. Create a query using the **By Example** lookup, or **Advanced Query** option.
- 2. From the **File** menu, click **Save**.
- 3. In the **Save As** dialog box, type a file name.
- 4. Make sure that the file type is Query File (\*.QRY) and the file name extension is .QRY, and then click **Save**.

#### To reuse a query

- 1. In the **Query** window, click **Open**.
- 2. In the **Open** dialog box, locate the saved query that you want to use, and then click **Open**.
- 3. From the **Query** window, click **Preview**.

# Finding contacts, companies, or groups using keywords

A keyword can be any word that appears somewhere in a contact record. For example, if you have looked up a contact record and need to find a note about budgets for that contact, you can save time by searching the Notes of that record to find only entries containing the keyword "budget".

#### To find contacts, companies, or groups using keywords

- 1. From the **Lookup** menu, choose **Keyword Search**. The Keyword Search dialog box appears.
- 2. In the **Search for** field, type the word or phrase that you want to find or select an item from the list.
  - The list contains the last five keywords that you searched for.
- 3. In the **Search these records** area, select a record type: **Contacts**, **Groups**, or **Companies**.
- 4. Select an option to specify which records to search: **All records**, **Current records**, or **Current lookup**.
- 5. In the **Look in** area, select to search in **Activities, Opportunities, Histories, Notes,** and/or **Fields**.
  - You can select one or all options.
- 6. Click Find Now.

ACT! Premium for Web Server searches the record type for the value you specified and displays the search results at the bottom of the window. You can access the contact record from the list or click Create Lookup. You can create a lookup of selected records or all records in the list. For more information, see <a href="Creating lookups from keyword searches">Creating lookups from keyword searches</a>.

If no records match your search criteria, a message appears and ACT! Premium for Web Server returns you to the Keyword Search window.

For more information about this using keywords, see <u>Tips for Keyword Searches</u>.

# Creating lookups from keyword search results

#### To create a lookup from keyword search results

- 1. Follow the steps to <u>find contacts</u>, <u>companies</u>, <u>or groups using keywords</u>.
- 2. From the **Keyword Search** dialog box, click **Create Lookup**. A lookup of all records is created.
- 3. To create a lookup of only selected records, select the records from the search results first, and then click **Create Lookup**.

ACT! creates a lookup of the record type and displays the records in the Contact List, Group List, or Company List window. The Keyword Search window is minimized in the lower left corner of the window so that you can perform another keyword search later, if necessary.

# Tips for keyword searches

If a keyword search returns too many results, you can refine the search. Use any of the following techniques to refine a keyword search.

- Sort the results of the keyword search by clicking a column heading.
- Enter more specific text in the Search For field. For example, search for "pricelist" instead of just "pri" or "price".
- Search in fewer areas of the record. For example, search only in the Notes tab, History tab, or Activities tab.
- Search within a selected record only.
- Create a lookup of the results of the keyword search and then search within the lookup for different text. For example, you want to find all contacts to whom you sent a price list. You may have used the word "price" in a field, but you cannot remember which field. Perform a keyword search for "price", and then Create a lookup of the results by clicking the Create Lookup button in the Keyword Search dialog box. Then, perform another keyword search; in the Search For field, enter "Customer" and select the Current Lookup option to search only within the current lookup of contacts. To further refine the search, select only the Contact Fields option in the Search In group box.
- Create a lookup using a Lookup command, and then search within the lookup for the keyword. For example, you might create a lookup of all contacts with an ID/Status of Customer, and then use the Keyword Search dialog box to search in the current lookup for "pricelist".

# **Deleting the current lookup**

#### To delete contacts in the current lookup

- 1. To delete a lookup of contact records, create a lookup to find the contact records you want to delete. See <u>Looking up contacts</u> for more information.
- 2. From the **Contacts** menu, click **Delete Contact**.
- 3. When the warning message appears, click **Delete Lookup** to delete the current lookup of contacts.

# **Looking up annual events**

#### To lookup annual events

- 1. From the **Lookup** menu, click **Annual Events**.
- 2. In the **Annual Events Search** dialog box, select an event from the **Search for** list.
- 3. In the **Time Range** box, select a set of dates or date range, in which to search for events, and then click **Find Now**. Press **F1** for more help.



If you want to look up annual events that may occur on February 29th for years that do not include February 29th, select the date range 2/28 to 3/1.

A list of contact names and event dates appear.

- 4. Click **Create Lookup** to view the records, or click **Print List** to print the lookup results.
- 5. (Optional) To display a specific contact record, select the contact from the list, and then click **Go To Contact**.
- 6. (Optional) To schedule a recurring to-do activity for the event, select a contact from the list, and then click **Schedule To-do**.
  - The Schedule Activity dialog box appears, in which you can schedule the activity. All activities scheduled for an annual event appear as to-do activities on your calendars.
- 7. Click **Close** to exit, or click **New Search** to find other annual events.

# Looking up by example

You can use the Lookup By Example dialog box to create a query to search for contacts, companies, or groups.

#### To look up by example

- 1. On the navigation bar, click the **Contacts**, **Groups**, or **Companies** button for the type of record to search for.
- 2. From the **Lookup** menu, click **By Example**.
- 3. In the **Lookup By Example** dialog box, type a keyword in one or more of the fields. The fields are different for contacts, companies, or groups searches.
  - For example, you could search for all contacts with the title of CEO that reside in the state of California.
- 4. Click Search.
- 5. At the **Run Query Options** dialog box, select one of the options, and then click **OK**.

You can Replace lookup, Add to lookup, or Narrow lookup. Not all options are available for each search. For more information, see <u>Narrowing</u>, <u>adding</u> <u>to</u>, <u>and replacing a lookup</u>.

The results appear in the Contact, Company, or Group List.

# **Looking up my record**

## To look up my record

• From the **Lookup** menu, select **My Record**.

The record appears in the Contact Detail window.

# Narrowing, adding to, or replacing a lookup

#### To narrow a lookup

- 1. From the **Lookup** menu, choose a contact, groups, companies, or opportunities command.
- 2. Complete the necessary fields in the Lookup dialog box.
- 3. In the **For the current lookup** area, select **Narrow Lookup** from the drop-down list, and then click **OK**.

For field definitions click F1.

#### To add to a lookup

- 1. From the **Lookup** menu, choose a contact, groups, companies, or opportunities command.
- 2. Complete the necessary fields in the Lookup dialog box.
- 3. In the **For the current lookup** area, select **Add to Lookup** from the drop-down list, and then click **OK**.

#### To replace a lookup

- 1. From the **Lookup** menu, choose a contact, groups, companies, or opportunities command.
- 2. Complete the necessary fields in the Lookup dialog box.
- 3. In the **For the current lookup** area, select **Replace Lookup** from the drop-down list, and then click **OK**.

# **About queries**

If you cannot find contacts using the Add To Lookup and Narrow Lookup options in the Lookup dialog box, use the By Example Lookup command to create a query. A query searches by comparing all contacts in the open database with multiple criteria that you specify, and creates a lookup of contacts that match those criteria.

#### Learn more about

Advantages of using queries Creating Advanced queries

## How do I...?

Create a query using lookup by example
Create an advanced query
Save or reuse a query

# Tips for creating queries

- •To find multiple word items, enclose the words in quotation marks. For example, to find New York, type "New York".
- If you enter search criteria in more than one field the && (and) operator is automatically used between these fields. For example, if you enter London in the City field and prospect in the ID/Status field, the query finds all prospects in London. If you want the relationship between fields to be OR (||), you must create an Advanced query. See <u>Creating an advanced query</u>.
- •To find all contacts that have any data in a specific field, type an asterisk in the field.
- Queries are not case-sensitive; you do not have to enter text with the correct capitalization. You could enter "XYZ COMPANY" or "xyz company" to find all contacts at XYZ Company.

# **Creating advanced queries**

#### To create an advanced query

- 1. From the **Lookup** menu, point to **Advanced**, and then click **Advanced Query**.
- 2. From the **Advanced Query** screen, in the **Type** field, select **Contact** or **Opportunity**.

The default setting is Contact.

- 3. In the **Field Name** field, select one of the available contact or opportunity fields.
- 4. In the **Operator** field, select one of the available items, such as Contains or Equal To (=).
- 5. In the **Value** field, type a value or select one of the available items that correspond to the selected Field Name item.
- 6. Click **Add to list**.

The query criteria appears in the columns in the middle pane of the dialog box.

- 7. Click **Preview** to see the record results and the total number of records that are included.
- 8. (Optional)To remove the criteria and start over, click **Remove**.
- 9. To select more than one criteria, follow steps 3 through 7 again, and use the And/Or column to build the query.

To change the And/Or setting, in the middle pane of the dialog box, click in the And/Or column for the item and select from the list.

- 10. When you finish selecting criteria, click **OK**.
- 11. At the **Run Query Options** message, select an option for the query, and then click **OK**.

Replace lookup is the default setting.

The results of the query display in the Contact List.

# Adding and deleting secondary contacts

Secondary contacts are "other contacts", usually within the same company. They can be a backup for the main contact or the main contact's assistant, team members, supervisor, etc. You can promote a secondary contact to a full contact, but once promoted, there will no longer be a connection to the main contact.

#### To add a secondary contact

- 1. From the **Contact** window, click the **Secondary Contacts** tab.
- 2. Click **New Secondary Contact**.
- 3. From the **Secondary Contact** dialog box, complete the necessary information, and then click **OK**.
  - Press **F1** for field definitions.
- 4. (Optional) To make this secondary contact private, select the **Private** check box.
- 5. Click **OK** to create the secondary contact.

  The secondary contact you created will appear on the Secondary Contacts tab of the primary contact.

#### To delete a secondary contact

- 1. From the **Contact Detail** window, click the **Secondary Contacts** tab.
- 2. Right-click on the contact you want to delete, and then select **Delete Secondary Contact** from the shortcut menu.
- 3. From the **Delete Contact** dialog box, click **Yes** to delete the selected secondary contact.

# **Promoting secondary contacts**

You can promote a secondary contact to a primary contact. Once the secondary contact is promoted, there will no longer be any association with the primary contact.



To complete this procedure, you must have the appropriate permissions. For more information, see <u>About user roles and permissions</u>.

#### To promote a secondary contact to a full contact

- 1. From the **Contact Detail** window, click the **Secondary Contacts** tab.
- 2. Select the secondary contact that you would like to promote, and then click **Promote**.
- 3. From the **Promote Secondary Contact** dialog box, select the fields to duplicate, and then click **OK**.

Press **F1** for more information.

### **Using the Contact window tabs**

#### **Notes tab**

By default, all notes associated with the current contact appear in the Notes tab, but you can use the Dates and Select Users <u>filters to change the display of the notes</u>. From the Options menu, you can choose to customize columns, which allows you to <u>add or delete columns that display on the tab</u>. For information about working with notes, see <u>Working with notes for a contact, company, or group</u>.

### History tab

A history item is automatically generated as the result of an action such as holding a meeting, sending an e-mail message, attaching a file to the contact record, and so on. You can also manually create a history item to document an action performed, such as sending a fax. From the History tab, you can use the Dates, Types, and Select Users <u>filters to change the display of the history items</u>.

### **Activities tab**

From the Activities tab, you can view all activities scheduled with a contact. You can schedule, reschedule, and sort the activities from the tab. For more information, see <u>About activities</u>.

### **Opportunities tab**

By default, all opportunities for a contact appear in the Opportunities tab. You can filter the list by date, status, user, and contact, and you can create and complete opportunities. For more information, see <u>About opportunities</u>.

### **Groups/Companies tab**

This tab displays a list of all groups and/or companies that the contact is a member of. You can choose to view Groups and Subgroups, or Companies and Divisions. You can also add contacts to a group or company from this tab.

#### **Documents tab**

From this tab, you can add any type of documents, such as Microsoft Excel spreadsheets, to a contact, company, or group record. This lets you easily open and edit the document from within ACT! Premium for Web Server. For more information, see <u>About the Documents tab</u>.

### **User Fields tab**

This tab contains definable fields that you can use for any type of contact information. For example, you may use the User 1 field to enter a contact's hobbies or where he/she like to dine. For more information, see <u>Editing a field</u>.

### **Contact Info tab**

Many of the fields in this tab are completed automatically and cannot be edited. However, you can <u>designate whether the contact is public, private, or limited access</u> and select a Record Manager from this tab.

### **Home Address tab**

This tab includes fields for a contact's personal information, such as various phone numbers and addresses.

### **Secondary Contacts tab**

This tab contains fields for the names and phone numbers of contacts that are associated with the current contact. For example, you may want to add the name and phone number of the contact's assistant, manager, or partner as a secondary contact. From this tab, you can also promote the secondary contact to a full contact. For more information, see <u>Adding secondary contacts</u>.

## Filtering the display of notes, histories, or attachments

#### To filter the display of notes, histories or attachments

Select the **Notes** or **History** tab for a contact, company, or group.

- To filter by date, in the **Dates** field, select one of the items from the list.
- To filter by user, click **Select Users**. In the **Select Users** dialog box, choose one of the options. For **Selected users**, choose user(s) from the list, and then click **OK**.
- To filter by history item type, in the **Types** box, select from the list. You can select more than one item type.

### Assigning user access to a contact record

When creating a new contact record or working with an existing contact record, you can assign user access to the record. By default, ACT! Premium for Web Server assigns a setting of Public for all new contact records. For more information on preferences settings, see <u>Setting options for contact, group, and opportunity records</u>.

#### To assign user access to a contact record

- 1. Open the **Contact Detail** window.
- 2. Click the **Contact Info** tab.
- 3. In the **Contact Access** area, select one of the options:
- **Public** All users have access to the contact record.
- **Private** Only the user that created the record has access; other users cannot access the record.
- **Limited Access** Select a user or team to access the record.

#### **About the ACT! Premium for Web Server Dialer**

Using the Dialer in ACT! Premium for Web Server, you can dial contacts, and manage or time calls you make when using the Dialer, while scheduling activities or performing other tasks for the contact with whom you are speaking. The Dialer acts as an extension of your telephone and modem.

#### **Prerequisites**

A modem that shares a line with your telephone.

or

•A telephone equipped with Telephone Application Programming Interface (TAPI) hardware and the appropriate telephone driver software installed on your computer. The Dialer uses TAPI technology included with Microsoft Windows. TAPI functions as a link between your computer and your modem or telephone.

Before using the Dialer, you must set preferences for how it works with your telephone or modem. You can also set up the behaviors of the Dialer, such as whether or not the timer should start immediately for outgoing calls and whether or not to hide the dialer after initiating a call.

For information about the features your modem supports, see your modem documentation or contact your modem vendor. For information about using your telephone with the Dialer, contact your telephone administrator or telephone system vendor.

### How do I...?

Set up the Dialer
Select a contact to call
Make a call using my modem
Time outgoing calls
Add a Dialer tool to the toolbar

### **Setting up the Dialer**



Before using the Dialer, you must turn it on and set preferences for how it works with your telephone or modem.

#### To set up the Dialer

- 1. From the **Tools** menu, click **Preferences**.
- 2. In the **Preferences** dialog box, click the **Communication** tab, and then click **Dialer Preferences**.
- 3. Select **Use Dialer** to turn it on.
- 4. Select your modem or telephone line from the **Modem or line** list, and click **Setup** to configure the modem or telephone line.
  - For information about setup options, see your modem or telephony software documentation.
  - If your modem or telephone is not listed in the Modem or line list, make sure that the modem driver or telephone driver software was installed correctly. For information about installing a modem driver, see Windows online Help.
- 5. (Optional) Click **Properties** to select a location from the **Location** list.
- 6. (Optional) Click **New** to create a new location, or click **Edit** to change an existing location.
- 6. (Optional) The **Hide dialer after dialing** option is selected by default. Uncheck this option if you want the Dialer to stay on your screen after dialing is complete.
- 7. (Optional) The **Start timer automatically on outgoing calls** option is selected by default. Uncheck this option if you do not want the timer to start automatically.
- 8. Click **OK** to close the **Dialer Preferences** dialog box.

## **Selecting a contact to call**

#### To select a contact and set up the call

- 1. Display the record of the contact you want to call in the **Contact Detail** window.
- 2. From the **Contacts** menu, click **Phone Contact**.
- 3. From the **Dialer** dialog box, select a phone number, and then press **Dial**. For field definitions, press F1.



To set up long distance or "outside line" dialing, click the Properties button in the Dialer dialog box.

## Dialing calls using ACT! Premium for Web Server

#### To dial a telephone call using ACT! Premium for Web Server

- 1. Select the contact to call.
- 2. From the **Contacts** menu, click **Phone Contact**.
- 3. Do one of the following:
- From the **Dialer** dialog box, double-click a telephone number.
- Select a telephone number, and then click **Dial**.
- Type a number in the Number to Dial field. Enter all characters
  necessary for dialing from your location, such as a country code or
  number to access an outside line. (If you select a number in an ACT!
  Premium for Web Server phone field, these characters are automatically
  entered based on the settings in the Windows Dialing Properties.)

One of the following occurs:

- If you selected the Hide dialer after dialing option in the Dialer Preferences, the Dialer disappears once the number is dialed.
- The Windows **Call Status** dialog box appears.
- If you selected the **Start timer automatically on outgoing calls** option in the **Dialer Preferences**, the **Timer** opens and begins timing the call.
- To hang up before the call is answered, click Hang Up in the Call Status dialog box.
- 4. When the telephone is answered, pick up the handset, and then click **Talk** in the **Call Status** dialog box.

#### To end the call

• Hang up the telephone handset, and/or click the **Hangup** button to place another call.

The **Record History** dialog box appears.

If you timed the call, press **Stop**, and then the **Record History** dialog box appears.

If the call was not timed, the **Record History** dialog box appears once the call has been made.

### **Timing outgoing calls**



Follow this procedure only if you do not have your preferences set to start the timer automatically.

#### To time outgoing calls

- 1. Select a contact to call and place the call using a TAPI-enhanced telephone or using your modem.
- 2. From the **Tools** menu, click **Timer**.
- 3. In the timer, click **Start** any time after dialing.
- 4. (Optional) Do any of the following while timing your call:
- To pause the timer, click **Pause**; click **Start** to resume timing.
- To stop the timer and cancel the call history before you hang up, click the **Close** button in the top right corner of the timer.
- To stop the timer and create a call history, click **Stop**.

### **Recording call histories**

Recording call histories is the same as recording an activity history.

#### Recording a call history from the Contact window

When you hang up the telephone and close the **Dialer** dialog box and/or the timer, the **Record History** dialog box appears. Record the outcome of your call.

If the timer was used, the elapsed time of the call is shown in the Duration field in the History record.



If you timed the call, you may have to stop the timer to display the Record History dialog box.

#### **About activities**

When you schedule an activity with a contact, you can set an activity alarm, write details about the activity, and set the activity as recurring. In addition, after the activity has occurred, you can reschedule or clear the activity, track activities with specific contacts, or schedule a follow-up to a cleared activity. Some of the other options available with activities are associating the activity with groups and companies, scheduling an activity series, customizing your activity types, sending invitations to users in the database, and e-mailing an activity to your contacts.



Activity types are: Call, Meeting, To-do, Personal Activity, and Vacation. You can also add custom activities. Users using a remote database cannot add or modify custom activity types.

You can view and clear your activities on the Task List, calendars, or an individual contact's tab. Once an activity is cleared, a history is created, and you can view the history of the activity on the contact record's History tab.

### How do I...?

Schedule activities Clear activities and record histories Manage activities

### **Related topics**

About activity series

About annual events

About ACT! Premium for Web Server Preferences

About working with Outlook and ACT! Premium for Web Server calendars

### **About activity series**

An activity series makes it easier to repeatedly schedule the same set of activities with contacts. You can schedule the series yourself or set a trigger to automatically schedule the series.

You create an activity series using the Activity Series Template Creation Wizard. You can name and describe the series, set it as public or private and add activities for yourself and other users. You can also edit or delete an existing activity series template.



The Activity Series name must be unique, and you must add at least one activity.

Once you create the template, you can schedule the series with one or more of your contacts and set the anchor date. The anchor date is the starting point from which all activities in the series are scheduled. Activities in the series either occur before or after the anchor date. Because activities are linked, if one activity is changed to another date, you can choose to also change the dates for the rest of the activities.

You can set a trigger to automatically schedule the series when you leave, enter, or change a specific field. You must first set the field trigger through Define Fields. For more information about setting a field trigger, see <u>Launching an application</u>, activity series, or <u>URL</u>.

Unless the activity series is marked private, once it has been created, it is available to users who have access to creating activities.

### How do I...?

Create an activity series
Schedule an activity series
Change an activity series

# **Related topics**

About activities

About fields and field attributes

### Viewing and sorting activities

#### To view activities from the Activities tab

- 1. Use a command in the **Lookup** menu to find the contact, group, or company whose activities you want to view.
- 2. Click the **Activities** tab.

#### To sort activities on the Activities tab

Click the heading of the column that you want to use to sort the list. For example, to sort by date, click the Date heading. To reverse the sort order, click the column heading again.

To filter activities in the Activities tab, use the filter options at the top of the tab. For more information on filtering, see <u>Filtering activities</u>.

### **Scheduling activities**

You schedule activities using the tabs on the Schedule Activity dialog box.

When an activity is scheduled with an ACT! Premium for Web Server user, an invitation to attend the activity is sent to that user, and the activity is placed on the user's calendar. The user is notified of the invitation by a pop-up window that appears in the lower right corner of the ACT! Premium for Web Server window. When an activity is scheduled with an ACT! Premium for Web user, the activity is placed on the user's calendar and no notification is sent to the user.

#### To schedule an activity

1. From the toolbar, select an activity type: **Meeting**, **Call**, or **To-do**.



To schedule a custom activity, from the **Schedule** menu, click **Other**, and then select the activity type. For information about adding a custom activity, see <u>Adding a custom activity type</u>.

The Schedule Activity dialog box appears. For field definitions, press F1.

- 2. Complete the fields in the **General tab**.
- 3. (Optional) Complete the fields in the **Details tab**.
- 4. (Optional) Complete the fields in the **Recurrence tab**.
- 5. (Optional) Complete the fields in the **Availability tab**
- 6. Click **OK**.

### **Scheduling activities for different time zones**

Previous versions of ACT! did not adjust activities according to time zone changes (such as Daylight Savings Time). The latest version has been modified so that when you schedule an activity with someone in a different time zone, ACT! will adjust the time accordingly for that individual. For example, if you are in Arizona and schedule a meeting for 10am with someone in California, the meeting will be scheduled at 9am for the contact in California. When Daylight Savings Time changes, the information is automatically updated.

You can set up your time zone from the Control Panel in the Date/Time Properties dialog box. For more information, see the Microsoft Windows online help.

## **Scheduling custom activity types**

You can schedule a custom activity type instead of a call, meeting, or to-do. For more information about custom activity types, see <u>Adding a custom activity type</u>.

#### To schedule a custom activity type

- 1. From the **Schedule** menu, point to **Other**, and select the activity type from the list.
  - The Schedule Activity dialog box appears. For field definitions, press F1.
- 2. <u>Schedule</u> the activity.

# **Scheduling activities from calendars**

### To schedule an activity from a calendar

- 1. From the navigation bar, click **Calendar**.
- 2. Display the **Schedule Activity** dialog box by doing one of the following:
  - In the **Daily** or **Work Week** calendar, double-click the time slot.
- On the toolbar, click the **Call**, **Meeting**, or **To-do** tool.
- 3. <u>Schedule</u> the activity.

### Scheduling activities with groups or companies

#### To schedule an activity with a group or company

1. Schedule an activity.



When scheduling an activity with a group or company, you must also select at least one contact.

- 2. In the **General** tab, in the **Associate With** field, click the browse (...) button.
  - The Associate with Group/Company dialog box appears. For field definitions, press F1.
- 3. Select the **Groups/Subgroups** or **Companies/Divisions** tab.
- 4. From the list, select the groups or companies, and then click the right arrow button. For information on selecting multiple items, see <u>Selecting more than one name or item</u>.

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To add all groups or companies in the list, click the double-right arrow button.

The activity displays in the Activities tab of the group or company and the Activities tab of the contacts associated with the group or company.

### **Scheduling activities for other users**



A user who has the security level of Administrator or Manager, or who has access to another user's calendar, can schedule an activity for that user. For more information, see <u>About user roles and permissions</u>. For more information about giving a user permission to schedule activities for you, see <u>Granting calendar access to other users</u>.

#### To schedule an activity for other users

- 1. <u>Schedule</u> an activity. In the **General** tab, click the **Schedule For** button. The Schedule For dialog box appears. For field definitions, press F1.
- 2. From the **Schedule this activity for** list, select the user for whom you want to schedule the activity.

The activity is added to the user's calendar, and invitations are sent out.

### **Scheduling activities for multiple contacts**

#### To schedule an activity with multiple contacts

- 1. Schedule an activity.
- 2. In the **General** tab, click the **Contacts** button, and then click **Select Contacts**.

The Select Contacts dialog box appears. For field definitions, press F1.

- 3. From the **Select from** field, select **All Contacts**, **Current Lookup**, **Groups**, or **Companies**.
- 4. From the **Contacts to select from** list, select contacts, and then click the right arrow button. For information on selecting multiple items, see <u>Selecting more than one name or item</u>.

or

To add all contacts in the **Contacts to select from** list, click the double-right arrow button.



To search for a user, contact, or company, sort the list by clicking the column header you want to search by, and then in the Look for field, type the first few letters of the user's, contact's, or company's name.

### **Scheduling an activity series**

You must <u>create a series</u> before you can schedule it. Then, you can schedule an activity series with yourself and/or with contacts.



Before scheduling the series with a large number of contacts, test the series by scheduling it with one contact.

No conflict checking is performed when the activities are scheduled. All activities are scheduled as timeless, non-recurring, public activities.



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To schedule an activity series

- From the Schedule menu, click Activity Series.
   The Schedule Activity Series dialog box appears. For field definitions, press F1.
- 2. From the **Activity Series template** list, select the activity series that you want to schedule.
- 3. In the **Series anchor date** field, select the anchor date.
- 4. In the **With** list, select the contact with which to schedule the activity series, and then click **OK**.

or

To schedule an activity in the series with multiple contacts, from the **Contacts** button, click **Select Contacts**, select the contacts, and then click **OK**.



To schedule an activity series with a new contact, My Record, or to select contacts from a list, click the Contacts button and select the appropriate option.

5. Click **Schedule**.

### **Scheduling full-day activities**

#### To schedule a full-day activity from the Schedule Activity dialog box

**Schedule** an activity. In the **General** tab, select the **Start Time** and **End Time** of your day. For example, if your normal start time is 8AM, select 8AM. If your normal end time is 5PM, select 5PM.

When you select the end time, the Use Banner check box is selected.

#### To schedule a full-day activity from a calendar

- 1. From the navigation bar, click **Calendar**.
- 2. From the toolbar, click the **Daily** button.
- 3. Select the date from the calendar.
- 4. Using your mouse, select the start time and drag to select the duration. For example, if your normal start time is 8AM, select 8AM. If your normal end time is 5PM, drag your pointer to select 5PM.
- 5. <u>Schedule</u> the activity. The Use Banner check box is selected. The activity displays as a banner on the calendar view.

# **Scheduling timeless activities**

### To schedule a timeless activity

**<u>Schedule</u>** an activity. In the **General** tab, display the **Start Time** list, and then click **Timeless**.

# **Scheduling private activities**



When you schedule a private activity, no other users can see the activity; however, if another user views your calendar, the private activity displays as "busy".

## To schedule a private activity

- 1. Schedule an activity.
- 2. In the **Schedule Activity** dialog box, select **Private**, and then click **OK**.

## **Scheduling recurring activities**

## To schedule a recurring activity

- 1. Schedule an activity.
- 2. In the **Schedule Activity** dialog box, click the **Recurrence** tab.
- 3. Select an **Occurs** option, and then select the frequency with which you want the activity to occur.
- 4. In the **Starts** calendar selector, select the start date.
- 5. Select **No End Date** to schedule the activity to occur indefinitely. **or**

Select **Ends**, and then use the calendar selector to select the end date.

#### To end a recurring activity

- 1. From the **Activities** tab or one of the calendars, double-click the next occurrence of the activity.
- 2. In the **Recurrence** tab in the **Schedule Activity** dialog box, select the **Once** option, and then click **OK**.
- 3. In the **Edit Recurring Activity** dialog box, select **Edit all occurrences**, and then click **OK**.

All future activities are deleted.



To modify an instance of the recurring activity, in the Edit Recurring Activity dialog box, select Edit this occurrence.

## **Scheduling follow-up activities**



You can schedule a follow-up activity when you record a history, clear an activity, or from the Opportunity dialog box.

#### To schedule a follow-up activity while recording a history

- 1. From the **Contacts** menu, click **Record History**.
- 2. From the **Record History** dialog box, <u>record</u> a history, and then click the **Follow-up button**.
- 3. <u>Schedule</u> the follow-up activity.

## To schedule a follow-up activity while clearing an activity

- 1. Clear an activity.
- 2. From the **Clear Activity** dialog box, click the **Follow-up** button.
- 3. <u>Schedule</u> the follow-up activity.

#### To schedule a follow-up activity from the Opportunity dialog box

- 1. Open an opportunity.
- 2. From the **Opportunity** dialog box, click the **Follow Up** button.
- 3. <u>Schedule</u> the follow-up activity.

# **Changing recurring activities**

#### To change a recurring activity

- 1. From the contact's **Activities** tab or one of the calendars, double-click the occurrence of the activity you want to change.
- 2. From the **Schedule Activity** dialog box, modify the field or fields you want to change, and then click **OK**. For field definitions, press F1. See <u>Scheduling an activity</u> for more information.
- 3. From the **Edit Recurring Activity** dialog box, select either **Edit this occurrence** or **Edit all occurrences**, as appropriate, and then click **OK**. For field definitions, press F1.

# **Rescheduling activities**

## To reschedule an activity

•Drag the activity to a new day or time slot on the calendar.

or

Double-click the activity and change the date or time in the **Schedule Activity** dialog box.



If the activity is scheduled with users, a dialog box appears asking if you want to send a new invitation to the users. If you click OK, ACT! Premium for Web Server users receive an invitation.

# **Deleting activities**

#### To delete activities

- 1. Display the activity from the contact's **Activities** tab, from the **Task List**, or from a **calendar**.
- 2. Right-click the activity, and then select **Erase Activity**.
- 3. Click **OK** to confirm the deletion.

When you delete an activity, no history is created.

## Adding custom activities and result types

You can create a custom activity type and schedule the custom activity. When you create a custom activity type, two types of results are assigned to it: Completed and Not Completed. The result types are used for clearing the activity. You can edit the name of the Completed and Not Completed result types, create result types, and delete result types that you created.



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To add a custom activity type and result type

- 1. From the **Schedule** menu, point to **Manage**, and then click **Activity Types**. The Manage Activity Types dialog box appears. For field definitions, press F1.
- 2. Click Add.

The New Activity Type dialog box appears. For field definitions, press F1.

- 3. In the **Name** field, type the name of the activity type.
- 4. (Optional) The **Active allow new activities of this type** check box is selected by default. To make the activity type inactive, clear the check box.
- 5. (Optional) To assign an icon to the activity type, click **Browse** and select the icon. For more information about icons, see <u>Assigning an icon to an activity type</u>.
- 6. (Optional) To add a new result type, click **Add**, type the name of the result type in the **Result name** field of the **Add Result Type** dialog box, and then click **OK**.
- 7. (Optional) To edit a result type, select the result type and click **Edit**; in the **Edit Result Type** dialog box, edit the result type, and then click **OK**. For field definitions, press F1.
- 8. In the **Add Activity Type** dialog box, click **OK**.

The activity type appears in the Activity Types list. Once you add an activity type, you can deactivate it, but you cannot delete it. For information on deactivating the activity type, see <u>Deactivating an activity type</u>.

## Adding an event

You can schedule an event to display on each user's calendar, depending on the user's preferences. Users specify the preference for events in Calendar Preferences. For more information about setting calendar preferences, see <a href="Setting preferences for calendars">Setting preferences for calendars</a>.

Events do not show in reports and are not checked for conflicts with other activities. Events are timeless activities that can be set as recurring and display as a banner on calendars.

#### To add an event

- 1. From the **Schedule** menu, point to **Manage**, and then click **Events**. The Manage Events dialog box appears. For field definitions, press F1.
- 2. Click **Add**. The Add Event dialog box appears. For field definitions, press F1.
- 3. In the **Event Name** field, type the name of the event.
- 4. In the **Date** and **Duration** fields, select the date for the event and the duration.
- 5. Select one of the occurrence options: **Once**, **Monthly**, or **Yearly**, and then click **OK**.

The event appears in the Events list of the Schedule Events dialog box.

## Activating and deactivating an activity priority



Activated priorities are included in the Priority List in the Schedule Activity dialog box. There must be at least one activated priority.

#### To activate an activity priority

- 1. From the **Schedule** menu, point to **Manage**, and then click **Priorities**.
- 2. In the **Manage Priorities** dialog box, select the priorities you want to activate by selecting the check box in the **Active** column, and then click **OK**. For field definitions, press F1.

#### To deactivate an activity priority

- 1. From the **Schedule** menu, point to **Manage**, and then click **Priorities**.
- 2. In the **Manage Priorities** dialog box, clear the priority in the **Active** column, and then click **OK**.

The deactivated priority will be unavailable for future activities, but any existing activities with the deactivated priority remain unchanged.

## Assigning icons to activity types

When you create a custom activity type, you can assign an icon to represent the activity type on the calendar. Icon files have a file extension of .ico. You cannot modify the icons for the Call, Meeting, or To-do activity types.

#### To assign an icon to an activity type

- 1. From the **Schedule** menu, point to **Manage**, and then click **Activity Types**. The Manage Activity Types dialog box appears. For field definitions, press F1.
- 2. Select the activity type you want to assign an icon to, and then click **Edit**. The Edit Activity Type dialog box appears. For field definitions, press F1.
- 3. Click the **Browse** button, and then locate and open the icon.
- 4. Click **OK**.

# **Deactivating activity types**

When an activity type is no longer being used, you can deactivate it. Current activities associated with a deactivated activity type do not change.

## To deactivate an activity type

- 1. Edit an activity type.
- 2. From the **Edit Activity Type** dialog box, clear the **Active** field, and then click **OK**. For field definitions, press F1.

## **Editing activity types**



You cannot edit a Call, Meeting, or To-do activity type.

#### To edit an activity type

- 1. From the **Schedule** menu, point to **Manage**, and then click **Activity Types**. The Manage Activity Types dialog box appears. For field definitions, press F1.
- 2. Select the activity type you want to edit, and then click the **Edit** button. The Edit Activity Type dialog box appears. For field definitions, press F1.
- 3. Edit the activity type by editing the name, assigning an icon, or modifying the result types. For more information about result types, see <u>Adding a custom activity type and result type</u>.

## **Editing activity priorities**

#### To edit an activity priority

- 1. From the **Schedule** menu, point to **Manage**, and then click **Priorities**. The Manage Priorities dialog box appears. For field definitions, press F1.
- 2. Select the priority you want to edit, and then click **Edit**.

  The Edit Priority Name dialog box appears. For field definitions, press F1.
- 3. Edit the priority name, and then click **OK**.



To restore the default priority names and their default activation status, click the Restore Defaults button.

## **Editing or deleting events**

#### To edit an event

- 1. From the **Schedule** menu, point to **Manage**, and then click **Events**. The Manage Events dialog box appears. For field definitions, press F1.
- 2. Select the event you want to edit, and then click the **Edit** button. The Edit Event dialog box appears. For field definitions, press F1.
- 3. Make your changes, and then click **OK**.

#### To delete an event

- 1. From the **Schedule** menu, point to **Manage**, and then click **Events**. The Manage Events dialog box appears. For field definitions, press F1.
- 2. Select the event you want to delete, and then click the **Delete** button.
- 3. Click **OK** to confirm the deletion.

# **Setting events as recurring**

## To set an event as recurring

- 1. From the **Schedule** menu, point to **Manage**, and then click **Events**. The Manage Events dialog box appears. For field definitions, press F1.
- 2. Select the event, and then click **Edit**.

  The Edit Event dialog box appears. For field definitions, press F1.
- 3. In the **Occurs** box, select **Monthly** or **Yearly**, and then click **OK**.

# **Restoring original activity priorities**

## To restore the original activity priorities

- 1. From the **Schedule** menu, point to **Manage**, and then click **Priorities**.
- 2. In the **Manage Priorities** dialog box, click the **Restore Defaults** button, and then click **OK**. For field definitions, press F1.

## **Creating activity series templates**



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To create an activity series template

- 1. From the **Schedule** menu, point to **Manage**, and then click **Activity Series Templates**.
- 2. In the **Activity Series Template Creation Wizard**, select **Create a new activity series**, and then click **Next**.
- 3. Follow the directions on the screen, pressing **Next** to advance. For field definitions on any screen, press F1.

# **Changing activity series templates**

## To change an activity series template

- 1. From the **Schedule** menu, point to **Manage**, and then click **Activity Series Templates**.
- 2. In the **Activity Series Template Creation Wizard**, select **Edit an existing activity series**, and then click **Next**.
- 3. Follow the directions on the screen, pressing **Next** to advance. For field definitions on any screen, press F1.

# **Deleting an activity from an activity series**

## To delete an activity from an activity series

- 1. From the **Activities** tab, select an activity that is part of an activity series.
- 2. From the right-click menu, select **Erase Activity**.
- 3. Click **OK** to confirm the deletion.
- 4. In the **Delete Activity Series** dialog box, select **Delete all occurrences**, and then click **OK**.

## **Scheduling resources**

When scheduling an activity, you can also schedule a resource to use with the activity. A resource is an item that can be reserved, such as a conference room or a projector, and it has conflict checking. Resources must be created before you can schedule them. For information about creating resources, see <u>Adding a new resource</u>. You schedule resources on the General tab or Availability tab of the Schedule Activity dialog box.



Users of a remote database cannot schedule resources for activities on their database.

#### To schedule a resource from the General tab

**Schedule** an activity. In the **General** tab, select the resource from the **Resources** list.

#### To schedule a resource from the Availability tab

- 1. <u>Schedule</u> an activity. In the **Schedule Activity** dialog box, click the **Availability** tab.
- Click the Users/Resources button.
   The Users/Resources dialog box appears. For field definitions, press F1.
- 3. Click the **Resources** button.
- 4. From the **Resources** list, select the resource or resources you want to add, and then click the right arrow button. For information on selecting multiple items, see <u>Selecting more than one name or item</u>.
  - The resources you selected appear in the Users/Resources list of the Availability tab.
- 5. Using the calendar to the right of the Users/Resources list, locate a time that all users and resources are available. For more information about selecting an available time for all users, see <a href="#">Checking the availability of users and resources</a>.



If the resource is unavailable, a dialog box appears saying that the resource is already reserved. Click OK to return to the Schedule Activity dialog box and select a different resource or time.

## **Adding resources and locations**

#### To add a resource and location

- 1. From the **Schedule** menu, point to **Manage**, and then click **Resources**. The Manage Resources dialog box appears. For field definitions, press F1.
- 2. Click **Add**. The Add Resource dialog box appears. For field definitions, press F1.
- 3. In the **Name** field, type the name for the resource.
- 4. (Optional) If you want to make the resource a location, select **This resource is also a location**, and then click **OK**. For more information on setting a resource as a location, see <u>Setting or deleting a resource as a location</u>.

The resource appears in the Resources list.

## **Editing or deleting resources**

#### To edit a resource

- 1. From the **Schedule** menu, click **Manage**, and then select **Resources**. The Manage Resources dialog box appears. For field definitions, press F1.
- 2. Select the resource you want to edit.
- 3. Click Edit.

The Edit Resource dialog box appears. For field definitions, press F1.

4. Edit the resource, and then click **OK**.

#### To delete a resource

- 1. From the **Schedule** menu, click **Manage**, and then select **Resources**.
- 2. In the **Manage Resources** dialog box, select the resource you want to delete.
- 3. Click **Delete**, and then click **OK** to confirm the deletion.

## Setting or deleting a resource as a location

When you add a resource, you have the option of setting the resource as a location. Then, when you select the resource in the Schedule Activity dialog box, the location shows in the Location field. If you select multiple resources, and they are also set as locations, the location of the first selected resource on the Resource list displays in the Location field. For information on adding a resource, see <u>Adding a resource</u>.

#### To set a resource as a location

- 1. From the **Schedule** menu, point to **Manage**, and then click **Resources**.
- 2. In the **Manage Resources** dialog box, select the resource, and then click **Edit**.
- 3. In the **Edit Resource** dialog box, select **This resource is also a location**, and then click **OK**.

#### To delete a location

- 1. From the **Schedule** menu, point to **Manage**, and then click **Resources**.
- 2. In the **Manage Resources** dialog box, select the resource, and then click **Edit**.
- 3. In the **Edit Resource** dialog box, clear **This resource** is also a location, and then click **OK**.

# **Creating separate activities for each contact**

You can schedule an activity with multiple contacts without having the contacts share the activity; each contact will have a separate activity associated with his/her contact record.

#### To create a separate activity for each contact

- 1. <u>Schedule</u> an activity. While in the **Schedule Activity** dialog box, click the **Options** menu.
- 2. Select **Create separate activity for each contact**, and then click **OK**.

## **Editing activities from a calendar or Recap List**

#### To edit an activity from a calendar

- 1. On the navigation bar, click **Calendar**.
- 2. On the calendar, double-click the activity you want to edit.

  The Schedule Activity dialog box appears. For field definitions, press F1.
- 3. Edit the activity. For information on completing fields in the **Schedule Activity** dialog box, see <u>Scheduling an activity</u>.

### To edit an activity from the Recap List

- 1. On the navigation bar, click **Calendar**.
- 2. From the **Recap List**, double-click an activity.

  The Schedule Activity dialog box appears. For field definitions, press F1.
- 3. Edit the activity. For information on completing fields in the **Schedule Activity** dialog box, see <u>Scheduling an activity</u>.

# Accessing contact records from the Task List or calendars

As you view a calendar or Task List, you might want to find the contacts with whom you have scheduled activities and who you have access to. To view the contacts, do one of the following:

- From the **Daily**, **Weekly**, or **Monthly** calendar, you can create a lookup of all contacts who appear on your current schedule.
- From the **Task List**, you can create a lookup of all contacts associated with selected activities, select an activity, and display that contact's record in the Contact window.

#### To access a contact record from the Task List

- 1. From the navigation bar, click **Task List**.
- 2. From the **Scheduled With** column, click the name of the contact you want to view.



From the Task List, click the contact's name from the Scheduled With column to access either a contact record (if the task is scheduled with a single contact) or a lookup of contacts (if the task is scheduled with multiple contacts).

#### To access a contact from a calendar

- 1. From a calendar, select the activity of the contact you want to view.
- 2. Right-click and choose **Go to Contact** from the shortcut menu.

## Finding contacts with scheduled activities

As you view a calendar or Task List, you might want to find the contacts with whom you have scheduled activities.

- From the **Daily**, **Weekly**, or **Monthly** calendar, you can create a lookup of all contacts who appear on your current schedule.
- From the **Task List**, you can create a lookup of all contacts associated with selected activities, select an activity, and display that contact's record in the Contact window.

#### To find contacts with scheduled activities

- 1. Select an activity on a calendar, or select one or more activities on the **Task List**.
- 2. Right-click, and then click **Create Lookup**.

The contacts with whom you have scheduled activities appear in the Contact window.

# **Timing activities**

Using the ACT! Premium for Web Server Timer, you can time activities from the Activities tab. When you finish timing an activity, the Clear Activity dialog box appears. In the Clear Activity dialog box, you can enter details about the activity and then clear it.

#### To time an activity from the Activity tab

- 1. On the **Activity** tab, select the activity you want to time.
- 2. From the **Tools** menu, select **Timer**.
- 3. Click the start button.
- 4. If necessary, click the pause button to temporarily stop timing the activity. Click the start button to restart.
- 5. Click the stop button when you finish the activity. The Clear Activity dialog box appears.
- 6. <u>Clear</u> the activity.

## Checking the availability of users and resources

When scheduling an activity, you can check the availability of users and resources from the Availability tab of the Schedule Activity dialog box or from one of your calendar views.

#### To check the availability of users and resources while scheduling an activity

- 1. <u>Schedule</u> an activity. In the **Schedule Activity** dialog box, click the **Availability** tab. For field definitions, press F1.
- Click the Users/Resources button.
   The Select Users and Resources dialog box appears. For field definitions, press F1.
- 3. From the **Users** list, select the users you want to add, and then click the right arrow button. For information on selecting multiple users, see Selecting more than one name or item.
- 4. Click the **Resources** button.
- 5. In the **Resources** list, select the resources you want to add, and then click the right arrow button. For information on selecting multiple items, see <u>Selecting more than one name or item</u>.
- 6. Click **OK** to close the dialog box and return to the **Schedule Activity** dialog box.
  - The users and resources you selected appear in the Users/Resources list of the Availability tab.
- 7. (Optional) To display a full day calendar, select **Show Full Day**; to display the work schedule, clear the option.
- 8. Using the calendar to the right of the Users/Resources list, view the availability of your users and resources. You can scroll through the window, or you can click the Auto Select back and forward buttons to find a time when all users and resources are available.

## To check the availability of users and resources from a calendar view

- 1. On the navigation bar, click **Calendar**.
- 2. From the toolbar, click **Check Availability**.
- 3. Click the **Users/Resources** button.

  The Select Users and Resources dialog box appears. For field definitions, press F1.

- 4. From the **Users** list, select the users you want to add, and then click the right arrow button. For information on selecting multiple users, see Selecting more than one name or item.
- 5. Click the **Resources** button.
- 6. In the **Resources** list, select the resources you want to add, and then click the right arrow button. For information on selecting multiple items, see <u>Selecting more than one name or item</u>.
- 7. Click **OK** to close the dialog box and return to the **Schedule Activity** dialog box.
  - The users and resources you selected appear in the Users/Resources list.
- 8. (Optional) To display a full day calendar, select **Show Full Day**; to display the work schedule, clear the option.
- 9. Using the calendar to the right of the Users/Resources list, view the availability of your users and resources. You can scroll through the window, or you can click the Auto Select back and forward buttons to find a time when all users and resources are available.

## Sending e-mail messages to activity participants

When you schedule an activity, you can send the activity details by e-mail to the affected contacts, but you must have e-mail set up to send messages. For more information, see <u>About e-mail</u>.

Users do not receive e-mail messages. Instead, they receive an invitation to accept, tentatively accept, or decline an activity. For more information, see <a href="Opening and responding to invitations">Opening and responding to invitations</a>.



To send an e-mail notification to contacts, each contact must have an e-mail address listed in the E-mail field of his/her contact record.

#### To send an e-mail message to activity participants

- 1. <u>Schedule</u> an activity. While in the **Schedule Activity** dialog box, click the **Options** menu.
- 2. Select **Send activity e-mail to contacts**, and then click **OK**. An ACT! new message window appears.
- 3. Review and modify the activity details, if necessary, and then click **Send**.

# Checking the invitation status for an activity

When you schedule an activity with other users, you can check the invitation status. The invitation status lets you see whether the users accepted, tentatively accepted, or declined the invitation.

#### To check the invitation status for an activity

- 1. Locate the activity, and then double-click it.
- 2. Click the **Availability** tab.
- 3. Click the **Show Invitation Status** button.

The Invitation Status dialog box appears. The users and their status are listed in the User and Status columns.

## **Opening and responding to invitations**



When an activity is scheduled with a user, an invitation to attend the activity is sent to that user, and the activity is placed on the user's calendar. The user is notified of the invitation by a pop-up window that appears in the lower right corner of the ACT! Premium for Web Server window.

#### To open and respond to an invitation

- 1. Click the invitations icon that is located in the right corner of the status bar. The Invitations dialog box appears. For field definitions, press F1.
- 2. Respond to the invitation by clicking **Accept**, **Tentative**, or **Decline**.

## **About calendars**

Calendars display all of your activities and to-do items for a day, a work week, a full week, or a month. You can set the days of your work week and specify your work schedule, such as a four day work week - Monday through Thursday from 7AM to 4PM.

Calendars allow you to view all of your activities and tasks and the public activities and tasks for other users. You can grant access to other users to schedule activities on your behalf, and other users can give you scheduling access so you can schedule activities on their behalf. The number of scheduled activities appears in the status bar of each calendar. If you use Outlook calendar sync, you can also view Microsoft Outlook activities.

From the calendar, you can edit, clear, print, and filter existing activities, or you can schedule new activities.

## How do I...?

**Display calendars Use the calendars** 

# **Related Topics**

About the Task List

About working with Outlook and ACT! Premium for Web Server calendars

# **Displaying calendar information**

### To display your calendars

On the navigation bar, click **Calendar**.

### To change your calendar view

From the toolbar, select the view (Daily, Work Week, Weekly, or Monthly).



Double-click the day heading for a specific day on the Weekly or Monthly view, and the calendar changes to the daily view for that day.

# **Displaying the Mini-calendar**

Depending on your calendar preferences, you can use the Mini-calendar to display either a three-month calendar (the last month, current month, and next month) or a one-month calendar (the current month). For more information about calendar preferences, see <u>Setting preferences for calendars</u>.

### To display the Mini-calendar, do one of the following:

- From the **View** menu, click **Mini-calendar**.
- Press **F4**.

## Filtering activities in calendars

You can use filter options with your calendars to narrow the activities that display on the calendar view. You can narrow the activities based on activity type, priority, or user; you can hide the filters so that they do not display on the calendar view. Filter settings apply to all calendars until you change them.



If filters are hidden, you will see the Show Filters button above the calendar. Click Show Filters to display the filter options. If the filters are shown, you can hide them by clicking the Hide Filters button.

### To filter activities on your calendars

- 1. On the navigation bar, click **Calendar**.
- 2. If filters are hidden, click **Show Filters**.
- 3. In the **Types** list, select the check boxes for the activity types you want to display.
- 4. In the **Priorities** list, select the check boxes for the priorities you want to display.
- 5. (Optional) To display activities for specific users, click the **Select Users** button, select the contacts whose activities you want to view, and then click **OK**.
- 6. (Optional) To display cleared or private activities, click **Options**, and then select **Show Private** or **Show Cleared**.



Even though you can set filters to Show Private and Show Cleared, you can only select one item at a time. To select the second item, click the Options button again, and then select the option.

Selecting Show Private includes your private activities on the list. You cannot view the private activities of other users.

# **Displaying information about activities**

### To display basic information about an activity

Using your mouse, hold the pointer over an activity in your calendar. Basic activity details appear and indicate whether the activity is recurring, has an alarm, or is private. Ellipses (...) indicate the activity has more details than those that display in the calendar pop-up.



You can disable calendar pop-ups from the Calendar Preferences dialog box. For more information, see <u>Setting preferences for calendars</u>.

## **Granting calendar access to other users**

Depending on user role or access permissions that you specify, another user can schedule activities on your behalf. Users who can always schedule activities on your behalf have an Administrator or Manager role; users who can be given access to schedule activities on your behalf have a Standard or Restricted role. All users, regardless of role, can view other users' calendars.

#### To grant calendar access to other users

- 1. From the **Schedule** menu, click **Grant Calendar Access**.

  The Calendar Access dialog box appears. The table lists all the users in the database and their access and role settings. For field definitions, press F1.
- 2. Select the user whose calendar access you want to modify.
- 3. Click the **Access** button.

  The Edit Access dialog box appears. For field definitions, press F1.
- 4. Select **View and Schedule** to give the user access to schedule activities for you, and then click **OK**.

# **Printing calendars**

You can print your scheduled activities using a specific type of calendar paper, such as a Day Runner brand calendar, and you can print activities from a specific calendar window, such as the monthly calendar window.

### To print a calendar

- 1. From the **File** menu, click **Print**.

  The Print dialog box appears. For field definitions, press F1.
- 2. From the **Printout Type** list, select **Day Calendar**, **Week Calendar**, or **Month Calendar**.
- 3. From the **Paper Type** list, select the brand of paper you want to use.
- 4. To preview the page, select **Enable Preview**.
- 5. (Optional) Set options for printing the calendar.
- 6. Click **Print**.

### To Quick Print a specific calendar window

- 1. From the navigation bar, click **Calendar**.
- 2. From the toolbar, select the view you want to print: **Daily**, **Work Week**, **Weekly**, or **Monthly**.
- 3. Click the **Print Calendar** button.
- 4. On the **Print** dialog box, click **OK**.

# Viewing another user's calendar



You cannot view details about another user's private activities, but the user's time displays as "busy" for the duration of the private activity.

### To view another user's calendar

- 1. On the navigation bar, click **Calendar**.
- 2. Click the **Select Users** button.
- 3. From the **Select Users** dialog box, select the user whose calendar you would like to view, and then click **OK**.

The user's activities display in the calendar view.

## Viewing a Recap List for another user

While in a calendar view, you can view a Recap List of activities that are scheduled on a specific day for you or for users you select. The Recap List displays beneath the Mini-calendar on the right side of the calendar window.

You can only view the Recap List of one user at a time, but you can select multiple users. When you select multiple users, buttons with each user's name appear in the Recap List. Click the user's name to open or close the Recap List for that user. If a selected user has no scheduled activities for the selected date, his or her name does not display in the Recap List.

### To view another user's Recap List

- 1. On the navigation bar, click **Calendar**.
- 2. Click the **Select Users** button.
- 3. From the **Select Users** dialog box, select the user or users whose Recap List you would like to view, and then click **OK**.
- 4. From the calendar, select the date for the **Recap List** you would like to view.

The user's tasks display in the Recap List. If you selected multiple users, you can click the button with the user's name to view that user's tasks.

# Tips and shortcuts for calendar views

Right-clicking
Double-clicking
Cut and paste activities
Drag and drop activities
Using the Mini-calendar

### **About the Task List**

The Task List displays any combination of calls, meetings, to-do items, and custom activities for a specified period of time. You can filter and sort the list to display only the activities you want to see or print, in the order you prefer. If you are sharing a database, you can also filter the Task List to display other users' activities.

The number of scheduled activities, based on the filters applied and for the time specified, appears in the status bar.

From the Task List, you can create a contact lookup; schedule, reschedule, and clear activities; and view activity details. You can also customize the look of the Task List by changing the font colors and styles and by adding, deleting, or rearranging columns.

### How do I...?

**Use the Task List** 

# **Clearing activities from the Task List**

### To clear an activity from the Task List

- 1. On the navigation bar, click **Task List**.
- 2. Select the check box for the activity you want to clear.

  The Clear Activity dialog box appears. For field definitions, press F1.
- 3. <u>Clear the activity</u>.

## Filtering activities on the Activities tab or on the Task List

You can use filter options to restrict the activities that display on the Task List or on a tab. You can narrow the activities based on date, activity type, or priority; you can also choose to show timeless, cleared, Outlook, and your private activities. Filter settings apply until you change them.



If filters are hidden, you will see the Show Filters button. Click Show Filters to display the filter options. If the filters are shown, you can hide them by clicking the Hide Filters button.

#### To filter activities on a tab

- 1. From a **Detail** view, click the **Activities** tab.

  The Filter Activities dialog box appears. For field definitions, press F1.
- 2. In the **Dates** list, select a date option.
- 3. In the **Types** list, select the check boxes for the activity types you want to display.
- 4. In the **Priorities** list, select the check boxes for the priorities you want to display.
- 5. To display activities for specific users, click the **Select Users** button, select the contacts whose tasks you want to view, and then click **OK**.
- 6. From the **Options** menu, select options you want to use in the filter: **Show Private**, **Only Show Timeless**, or **Show Cleared Tasks**.

The Options menu is located on the right side of the window.



Selecting Show Private includes your private activities on the list. You cannot view the private activities of other users.

#### To filter activities in the Task List

- 1. On the navigation bar, click **Task List**.
- 2. If filters are hidden, click **Show Filters**.
- 3. In the **Dates** list, select one of the date options.
- 4. In the **Types** list, select the check boxes for the activity types you want to display.
- 5. In the **Priorities** list, select the check boxes for the priorities you want to display.

- 6. (Optional) To display activities for specific users, click the **Select Users** button, select the contacts whose tasks you want to view, and then click **OK**.
- 7. (Optional) To display private, timeless, cleared, or Outlook activities, from the **Options** menu, select **Show Private**, **Only Show Timeless**, **Show Cleared Tasks**, or **Show Outlook Tasks**.

The Options menu is located on the right side of the window.



You can set filters so that the Task List shows private, timeless, cleared, and Outlook tasks, but you can only select one item at a time. To select another item, click the Options button again, and then select the option. Selecting Show Private includes your private activities on the list. You cannot view the private activities of other users.

# **Editing activities from the Task List**

### To edit an activity from the Task List

- 1. On the navigation bar, click **Task List**.
- 2. In the **Task List**, double-click a task.

  The Schedule Activity dialog box appears. For field definitions, press F1.
- 3. Edit the activity, and then click **OK**. For information on completing fields in the **Schedule Activity** dialog box, see <u>Scheduling an activity</u>.

# Viewing another user's tasks



You can only view another user's public activities.

#### To view another user's Task List

- 1. On the navigation bar, click **Task List**.
- 2. Click the **Select Users** button.
- 3. From the **Select Users** dialog box, select the users whose activities you would like to view, and then click **OK**.

The activities display in the Task List.

# **Printing the Task List**

### **To print the Task List**

- 1. From the navigation bar, click **Task List**.
- 2. From the **Toolbar**, click **Quick Print**.
- 3. On the **Print** dialog box, click **OK**.

# **Clearing activities**

#### To clear an activity

- 1. Select the activity that you want to clear by doing one of the following:
  - Select the activity, click the **Schedule** menu, and then click **Clear Activity**.
  - Select the activity, and then from the shortcut menu, click **Clear Activity**.
  - In the **Calendar** view, click the check box next to the activity in the **Recap List**.
  - In the **Task List** or the **Activities** tab, click the check mark column. The Clear Activity dialog box appears. For field definitions, press F1.
- 2. Click **Clear**, and then select the result from the list.
- 3. To include activity details with the history, make sure the **Add Details to History** option is selected. If necessary, edit or add activity details, and then click **OK**.
  - Changes appear in the Regarding field in the contact's History tab. If you cleared an activity that is scheduled with a private contact, you will create a history record for that contact even though you cannot see the contact.



Depending on the preferences you set, uncleared activities automatically roll over to the next day. However, activities scheduled with multiple users and resources will not roll over. For more information about scheduling preferences, see <a href="Setting scheduling">Setting scheduling</a> <a href="preferences for activities">preferences for activities</a>.

# **Clearing activities from the Recap List**

### To clear an activity from the Recap List

- 1. On the navigation bar, click **Calendar**.
- 2. From the **Recap List**, select the check box for the activity.

  The Clear Activity dialog box appears. For field definitions, press F1.
- 3. <u>Clear the activity</u>.

# **Clearing multiple activities**

### To clear multiple activities

1. From the navigation bar, click **Task List**, and then select the activities you want to clear.

or

From the **Activity** tab, select the activities you want to clear. For more information on selecting multiple items, see <u>Selecting more than one name or item</u>.

- 2. From the shortcut menu, select **Clear Multiple Activities**.
- 3. In the **Clear Multiple Activities** dialog box, select the result option, and then click **OK**. For field definitions, press F1.

### **Recording an activity history**

You can create a history record for a contact without scheduling and clearing an activity for that person. For example, you may have received a call from an individual earlier in the day but did not record the outcome of the call at that time. You can do so at any time and add the contact record at the same time.

### To record a history

- 1. Find the contact for whom you want to record a history.
- 2. From the **Contacts** menu, click **Record History**.
- 3. From the **Record History** dialog box, select an activity type from the **Type** list. For field definitions, press F1.
- 4. From the **Result** list, select a result.
- 5. From the **Contact** list, select a contact, or click the **Contacts** button to select multiple contacts.
- 6. From the **Date**, **Time**, and **Duration** lists, select a date, time, and duration.
- 7. (Optional) Click **Attach** to attach a file to the history.
- 8. (Optional) In the **Associate With** field, click the browse (...) button to select groups or companies to associate the history with.
- 9. From the **Record Manager** list, select a Record Manager.
- 10. Enter activity information in the **Regarding** field or select a description from the list.
- 11. (Optional) Enter additional information in the **Details** box.
- 12. (Optional) To make the history private, select **Private**.
- 13. (Optional) To schedule a follow-up activity, click Follow-up.
- 14. Click **OK**.



To add a contact while recording a history, click the Contacts button from the Record History dialog box, and then click New Contact.

### **About working with Outlook and ACT! calendars**

If you schedule some appointments and tasks in ACT! Premium for Web Server and some in Outlook, you may find it helpful to view all your calls, meetings, and to-do's on a single calendar in either ACT! Premium for Web Server or Outlook. Calendar updating allows you (the current user) to integrate your ACT! Premium for Web Server Premium for Web and Outlook calendars. You can view Outlook activities on ACT! Premium for Web Server calendars, in the Task List, or in the Activities tab.



To share information between ACT! Premium for Web Server and Outlook calendars, you must be using Outlook 2000 or later.

### **Updating calendars**

Outlook does not have to be running to update your ACT! Premium for Web Server Premium for Web and Outlook calendars. Users with a Restricted or above role can perform an update. ACT! Premium for Web Server offers three types of calendar updates:

- **One-way from ACT! calendar to Outlook calendar -** Copies your ACT! Premium for Web Server activities to your Outlook calendar.
- **One-way from Outlook calendar to ACT! calendar -** Copies your Outlook activities to your ACT! Premium for Web Server calendar.
- •Two-way If a field has been changed in both products, select the product that "wins" If an activity exists in both applications, select the product that will overwrite the activity.



If you use a multi-user database, only activities scheduled with or for you will be copied to Outlook. Each user must update his/her own calendars.

For more information, see <u>Understanding calendar integration</u>.

### **Importing Outlook items to ACT!**

When you import Outlook Calendar and Tasks items to ACT! Premium for Web, ACT! adds them to the database you have open, under My Record. ACT! imports only the current user's calendar and tasks, but you can associate the imported activities with any contact, group, or company. See <u>About importing</u> and exporting data for more information.

### How do I...?

Update my ACT! Premium for Web and Outlook calendars

Display Outlook activities and tasks in ACT!

Remove activities from my calendars

# **Understanding calendar integration**

To help you understand ACT! Premium for Web Server and Outlook calendar integration, here are some important items:

- You can edit the activities in either calendar, but we recommend that you edit the activity in the calendar of origin, and then update the calendars.
- Update Activities will not append or merge any data. If the activity exists in both applications, updating data from one database (Outlook or ACT! Premium for Web Server) to another will overwrite the activity.
- If your ACT! database contains activities imported from Outlook, updating your ACT! Premium for Web Server calendar with Outlook data overwrites those activities.
- Dateless Outlook tasks will only update the ACT! Premium for Web Server calendar if the date range for the update is set to All dates. However, only tasks originated in Outlook update from ACT! Premium for Web Server to the Outlook Tasks list.
- ACT! Premium for Web Server timeless activities, regardless of meeting type, will update to Outlook calendar as all-day events with the time displaying as free.
- Tentative Outlook activities will update to ACT! Premium for Web Server. Tentative ACT! Premium for Web Server activities will update to Outlook.
- Changes made to ACT! Premium for Web Server activities in Outlook will be ignored unless you have permission to edit that activity in ACT! Premium for Web Server. For example, a user schedules a meeting in ACT! Premium for Web Server with another user. The organizer of the meeting, but not the participant, has permission to edit the activity in ACT! Premium for Web Server. ACT! Premium for Web Server updates the activity to Outlook. The meeting time is changed in Outlook, by the participant, and the activity is updated back to ACT! Premium for Web Server. Because the participant does not have permission in ACT! Premium for Web Server to modify the meeting, the Outlook changes are ignored and both applications have different activities with different meeting times.
- An Outlook activity that contains additional users or contacts is updated to ACT! Premium for Web Server. If the users and contacts are identified in ACT! Premium for Web Server, the names are resolved and placed in the "Schedule With" field of the activity. If the names are not identified in

ACT! Premium for Web Server, the names are placed in the Details field of the activity.

## **Updating your ACT! and Outlook calendars**

You can update your ACT! and Outlook calendars and select a time frame for the updated activities. Outlook does not have to be running to update your ACT! and Outlook calendars. For more information, see <u>Understanding calendar integration</u>.

### To update your ACT! and Outlook calendars

- 1. Open the ACT! database that you want to update.
- 2. From the **Tools** menu, point to **Outlook Activities**, and then click **Update Activities**.

The Update Calendars dialog box appears. For field definitions, press F1.

- 3. In the **Update** box, select the type of update you want to perform.
- 4. In the **For these dates** box, select a date option, and if you chose **Date Range**, select a start date and an end date.
- 5. Click **Update**.



If you are updating your ACT! calendar with Outlook activities and a recurring Outlook activity falls within the date or dates you select, your ACT! calendar will include all occurrences of the Outlook activity.

# Displaying Outlook activities and tasks in ACT! Premium for Web Server

If you set up your ACT! Premium for Web Server calendar to share data with Outlook, you can view Outlook activities and tasks in ACT! Premium for Web Server's Calendar, Task List, and on related contacts' Activities tab.

Outlook activities and tasks in ACT! Premium for Web Server have unique icons:

Man Outlook activity updates as an ACT! Premium for Web Server meeting.

An Outlook task updates as an ACT! Premium for Web Server to-do.

### To display Outlook tasks in the ACT! Premium for Web Server Task List

- 1. On the navigation bar, click **Task List**.
- 2. On the **Task List** title bar, click **Hide Filters** / **Show Filters**.
- 3. In the filters area, click **Options**, and then click **Show Outlook Tasks**. Notice that Outlook tasks appear with the icon.
- 4. (Optional) To display task details, double-click the task title.

### To display Outlook activities in ACT! Premium for Web Server calendars

- 1. On the navigation bar, click **Calendars**.
- 2. On the toolbar, click a calendar display mode ( **Daily**, **Work Week**, **Weekly**, **Monthly**).

Notice that all Outlook activities appear with the icon.

3. (Optional) To display activity details, double-click the activity title.

# To display Outlook activities on the ACT! Premium for Web Server Activities tab

- 1. Display **My Record**.
- 2. Click the **Activities** tab.
- 3. In the **Types** list, select **Meetings** to display Outlook activities or select **To- Do's** to display Outlook tasks.
  - Notice that Outlook activities and tasks appear with their respective icons (as shown above).
- 4. (Optional) To display activity details, double-click the activity title.

  These procedures display Outlook activities that you copied to your



calendar through updating. It has no effect on Outlook activities that you imported to your database when importing contacts.

# Removing activities from your Outlook or ACT! Premium for Web Server calendars

You can remove ACT! Premium for Web Server activities from Outlook and Outlook activities from ACT! Premium for Web Server. This action will not remove cleared Outlook activities from ACT! Premium for Web Server and does not affect activities that were imported using the Import Wizard.



To remove cleared Outlook activities from ACT! Premium for Web Server, see Removing old data.

# To remove activities from your ACT! Premium for Web Server and Outlook calendars

- 1. Open the ACT! Premium for Web Server database you want to remove Outlook activities from.
- 2. From the **Tools** menu, point to **Outlook Activities**, and then click **Remove Activities**.
  - The Remove Activities dialog box opens. For field definitions, press F1.
- 3. In the **Remove all** box, select one or both of the options, and then click **OK**.

## **About groups and subgroups**

Groups and subgroups let you organize large lists of records into useful subsets, for example, you might want a group of all of your contacts that live in Arizona.

A group can include an unlimited number of subgroups and a maximum of 15 sub-subgroups. A subgroup is a subset of a group. A sub-subgroup is a subgroup of a subgroup. For example, a group may include individuals who live in the same state; within that group, you might have subgroups for towns and cities; within that subgroup, you may have a nested subgroup of street names. In addition, you can view the hierarchy of each group and subgroup.

You create and manage groups in the Group Detail window. The Group Detail window has many of the same features as the Contact window, including tabs for inserting or viewing notes, histories, activities, and opportunities of the contacts that are group members or items that are associated with the group.

The Group Detail window displays a Hierarchy box with drop-down list, an Up button, and a Subgroups box. The Hierarchy box shows the levels of a group's hierarchy. The list lets you view the position of the current group in its hierarchy and to move a group up in the hierarchy. You can also use the Up button to move a group up one level in the group hierarchy and to display the detail view for the selected group level. When you select the top group in the hierarchy, the Up button is disabled. The Subgroups box lists the names of all the subgroups contained in each level of a group's hierarchy. Click a subgroup name link to display its detail view.

You can also use the Groups/Companies tab in the Contact Detail window to see which groups/companies the contact is a static member of. You can add contacts to groups from this tab as well.

Groups can be created by saving a lookup as a group.

The Group Detail window also contains the View Groups/Companies navigator button. Click this button to easily select a group or company for viewing.

Tell me the advantages of using groups

## How Do I...?

**Use groups** 

Schedule an activity with a group or company

# **Related Topics**

About contacts
About companies

# **Creating and deleting groups**

#### To create a group

- 1. Display the **Group Detail** window.
- 2. From the **Groups** menu, select **New Group**.
- 3. In the **Group** field, type a name for the new group. Be sure not to duplicate an existing group name.
- 4. In the **Group Description** field, type a description for the group. You can enter up to 128 characters in this field.

#### To delete a group

1. In the **Group List**, select the group or subgroup that you want to delete.

or

Display the **Group Detail** window for the group you want to delete.

- 2. From the **Groups** menu, select **Delete**.
- 3. From the **Delete Group** dialog box, click **Yes** to delete the current group. The group, including all of its notes, history, and pointers to attachments, is deleted. The contacts that are members of the group are not deleted.

## Adding/removing group or company contacts

Use the Add/Remove Contacts dialog box to add members to a group or company or remove members.

#### To add or remove a group or company member

- 1. Display the group or company record for which you want to add or remove members.
- 2. Click the **Contacts** tab.
- 3. Click **Add/Remove Contacts**.
- In the Add/Remove Contacts dialog box, do one or both of the following:
   To manually add or remove contacts

   To add or remove contacts using query criteria
- 5. When you are finished adding or removing members, click **OK**. The members appear on the Contacts tab.

#### To add contacts to a group or company from the Contact Detail window

- 1. From the **Contact Detail** window, click the **Groups/Companies** tab.
- 2. Click the **Add Contact to Group** button.
- 3. From the **Add Contacts to Group/Company** dialog box, select the group or subgroup to add the contact to, and then click **OK**.
  - The Group Detail window appears with the contact you just added on the Contacts tab for the selected company.

### To remove contacts from a group or company

- 1. From the **Group List**, select the Group to remove contacts from.
- 2. From the **Groups** menu, select **Group Membership**, and then click **Add/Remove Contacts**.
- 3. From the **Add/Remove Contacts** dialog, click the **Contacts** button.
- 4. From the **Contacts** dialog box, select the contacts to remove from the specified group, and then click **OK**.

# **Creating duplicate groups**

You can easily create a duplicate group from an existing group. A reason for doing this might be that you want to use the members of an existing group for a new group. Once the group is duplicated, you can edit the group name and description, add subgroups, and add new members.

### To create a duplicate group

- 1. Do one of the following:
- Open the **Group Detail** window of the group you want to duplicate.
- From the **Group List** window, select a group.
- 2. From the **Groups** menu, click **Duplicate**.
- 3. In the **Duplicate Group** dialog box, select one of the options for duplicating data from primary fields or all fields, and then click **OK**. The Group Detail window displays.
- 4. In the **Group** name field, type the new group's name.
- 5. In the **Description** field, type the description for the new group.

# **Creating subgroups**

Subgroup membership is independent of group membership. A contact can be a member of a subgroup without being a member of the main group, and vice versa.

### To create a subgroup

- 1. Display the group that you want to create a subgroup for.
- 2. From the **Groups** menu, select **New Subgroup**. A blank Group Detail window appears.
- 3. In the **Group** field, type a name for the subgroup, and then press **TAB**.
- The subgroup name must be unique.
- 4. (Optional)Type a description for the subgroup. You can enter up to 128 characters in this field.

### **Converting groups to companies**

If you are a previous ACT! user, you may have set up groups to represent companies in your previous version. You can convert those groups into companies. Or you might want to convert a group to a company if, for example, you created a group in ACT! and now realize it might function better as a company.

#### To convert a group to a company

- 1. Display the group that you want to convert to a company.
- 2. From the **Groups** menu, select **Convert to Company**.
- 3. From the **Convert Groups to Companies Wizard**, follow the instructions on the screens, clicking **Next** to advance. Press **F1** for more help.
- 4. Once the conversion is complete, click the **Company List** to display the company you just created.

## Saving a lookup as a group

#### To save a lookup as a group

- 1. Create a lookup. See Finding contacts using a lookup for more information.
- 2. From the **Lookup** menu, point to **Groups**, and then select **Save Lookup as Group**.
  - A Group Detail window appears.
- 3. In the **Group** field, type a name for the new group.
- 4. In the **Group Description** field, type a description for the group. You can enter up to 128 characters in this field.
- 5. (Optional) Click the **Add/Remove Contacts** button if you want to modify the criteria or manually select additional contacts.

# **Moving groups**

#### To move a group

- 1. Open the group record that you want to move.
- 2. From the **Groups** menu, click **Move Group**. The Move Group dialog box appears.
- Select the option for the group. You can choose to promote a subgroup to a group, or change the group to a subgroup.
   For field definitions, press F1.

## Viewing the hierarchy of groups or subgroups

#### To view the hierarchy of a group or subgroup

- **F**rom the **Group Detail** view, from the **Hierarchy** list, select a level.
- •To move up one level in the group hierarchy, click the **Up** button.
- •To view a subgroup, in the **Subgroups** box, click the subgroup name. In each case, the Group Detail view changes to the view for the selection, and the Hierarchy list changes to reflect that hierarchy.

## **About finding groups and group information**

Finding groups and group information is similar to finding contacts and contact information. The Lookup menu contains a Groups command with several subcommands to let you search for all groups, by name, or other fields. All groups and subgroups are searched.

The Group/Companies Navigator allows you to find a group quickly. You can access the navigator from the Contact Detail, Contact List, Group Detail, Group List, Company Detail, and Company List windows.

### How Do I...?

Look up groups
Use the group navigator

### **About the Group List**

Use the Group List window to view all groups, find a group, create a new group or subgroup, create a duplicate group, delete a group, add contacts to group membership, and perform other tasks from the shortcut menu options.

You can customize the Group List columns to fit your needs.

The results of a group lookup display in the Group List. For example, you perform a lookup of groups that are resellers for your company. When you click OK, ACT! Premium for Web Server searches the database and the group records resulting from the search appear in the Group List window. You can then save this lookup as a new group. If only one group is found, the Group Detail window appears.

The Group List window also contains the View Groups/Companies navigator button. Click this button to easily select a group or company for viewing.

### How do I...?

**Use the Group List Customize columns** 

# **Related Topics**

About the Contact List
About the Company List

## **Looking up groups**

#### To look up groups

- 1. From the **Lookup** menu, click **Groups**, and then point to one of the groups subcommands. For more information about the groups commands and the search results, see <u>Commands in the Lookup menu</u>.
- If you select All Groups, the results immediately appear in the Group List window. You do not need the remaining steps.
- 2. In the **Look in this field** box, from the list, select the field on which to search.
  - The list shows all group fields that you can search in the database.
- 3. In the **Search For** box, type the word to search for or select a word from the list.
- 4. In the **For the current lookup** area, select the **Replace Lookup** option, and then click **OK**.
  - The Group List displays the search results. If only one group is found, the Group Detail window appears.

# **Displaying the Group List**

### To display the Group List

On the navigation bar, click **Groups**. From the toolbar, click the **Group List** icon.

or

From the **View** menu, click **Group List**.

### **Using the Groups/Companies navigator**

The Groups/Companies navigator allows you to quickly find a group or company when you are in any of the groups/companies windows. In the Contact windows, you can use this button to perform a lookup of the contacts in the group.

The navigator is found on the Contact Detail, Contact List, Group Detail, Group List, Company Detail, and Company List screens.

#### To use the Groups/Companies navigator

- 1. From one of the appropriate views, click the **View Groups/Companies** button.
- 2. From the **View/Groups Companies** dialog box, make your selections, and then click **OK**.

For field definitions press F1.

# Using the tabs in the Groups windows

#### **Contacts tab**

The Contacts tab appears in the Company and Group window and shows all members of a group. From this tab, you can <u>add additional contacts or remove contacts from membership</u>. Use the Options menu to <u>customize the columns</u>.

#### **Documents tab**

From this tab, you can add external documents to a group record, such as Microsoft Excel spreadsheets. This lets you easily open and edit documents in their original application while you are working in ACT! Premium for Web Server. See About the Documents tab for more information.

#### **Notes tab**

By default, all notes associated with the current group appear in the Notes tab, but you can use the Dates and Select Users <u>filters to change the display of the notes</u>. From the Options menu, you can choose to customize columns, which allows you to <u>add or delete columns that display on the tab</u>. For information about working with notes, see <u>Working with notes for a contact, company or group</u>.

### History tab

A history item is automatically generated as the result of an action such as a meeting was held, an e-mail message was sent, a file is attached to the group record, etc. You can also manually create a history item to document an action performed, such as sending a fax. From the History tab, you can use the Dates, Types, and Select Users <u>filters to change the display of the history items</u>.

### **Activities tab**

From the Activities tab, you can view all activities scheduled with a group. You can schedule, reschedule, and sort the activities from the tab. For more information, see <u>About activities</u>.

### **Opportunities tab**

By default, all sales opportunities for a group appear in the Opportunities tab. You can filter the list by date, status, user, and contact, and create and complete opportunities. For more information see, <u>About opportunities</u>.

### **Group Info tab**

The Group Info tab appears in the Group Detail window. This tab includes fields that are automatically maintained by ACT! Premium for Web Server such as the Create Date and Record Creator fields. However, you can designate whether the group is public or private, select a Record Manager for the group, and add address information.

### **About companies and divisions**

A company is a record type similar to a group, but with additional functionality. For example, you can create a contact from a company, create a company from a contact, and convert groups into companies.

Companies can also have divisions, just like various divisions in a company. A company can include up to 15 divisions. You may want to create a division for all contacts that work in a certain department within the company. In addition, you can create an unlimited number of sub-divisions.

You also have the ability to link a contact to a company. The link can be seen in the company field of the contact record. A contact can be a member of several companies, but each contact can only be linked to one company. Linking a contact to a company provides benefits such as updating contact information with company fields and automatically associating activities, notes, histories, and opportunities to that linked company.

You create and manage companies in the Company Detail window. The Company Detail window has many of the same features as the Contact Detail window, such as their own definable fields and layouts, and tabs for adding or removing contacts as members, inserting or viewing notes, histories, activities, and opportunities.

The Company Detail window also contains the View Groups/Companies button. Click this button to easily select a group or company for viewing.

### How do I...?

Work with companies
Work with fields and layouts

# **Related Topics**

About contacts
About groups

## **Creating and deleting companies**

### To create a company

1. From the **Company Detail** or **Company List** window, click the **New Company** icon on the toolbar.

A blank Company Detail window appears

- 2. Complete the fields as necessary.
- 3. Select the **Contacts** tab.
- 4. Click the **Add/Remove Contacts** button to <u>add contacts to the newly created company</u>.

The Add/Remove Contacts dialog box appears. For field definitions press F1.

5. Add contacts, and then click **OK**.

#### To delete a company

- 1. From the **Company Detail** or **Company List**, click the **Groups** menu, point to **Companies**, and then click **Delete**.
- 2. Click **Yes** to confirm the deletion.

## **Duplicating company records**

You can easily create a duplicate company record from an existing company record. Once the company information is duplicated, you can edit the company name and description, add divisions, and add new members.

#### To duplicate a company record

- 1. Display the company record that you want to duplicate.
- 2. From the **Groups** menu, point to **Companies**, and then click **Duplicate**.
- 3. In the **Duplicate Company** dialog box, select **Duplicate data from primary fields** or **Duplicate data from all fields**, and then click **OK**. The Company Detail displays.
- 4. In the **Company** name field, type the new company's name.
- 5. Complete other fields as necessary.
- 6. You can <u>create a division</u> and <u>add/remove contacts to/from the company</u>.

## **Creating divisions**

#### To create a division

- 1. Display the company that you want to add a division to.
- 2. On the toolbar, click the **New Division** tool. A blank Company Detail window appears.
- 3. Complete the necessary information for the division that you are adding.

When you display the original company, you will see the division you added in the Divisions box on the right side of the Company Detail window.

## **Creating companies from contacts**

Creating a company from a contact duplicates all of the appropriate company information.

#### To create a company from a contact

- 1. Display the contact record from which you want to create a company.
- 2. From the **Groups** menu, point to **Companies**, and then click **Create Company from Contact**.
  - The Company Detail window appears with the Company, Address, and Web Site fields completed, and the original contact is listed on the Contacts tab.
- 3. Complete additional fields as necessary.
- 4. Click the **Add/Remove Contacts** button to add more contacts to the company, or delete existing contacts from the company.

### **Linking contacts to companies**

You have the ability to link a contact to a company. The link can be seen in the company field of the contact record. Linking a contact to a company provides benefits such as updating contact information with company fields and automatically associating activities, notes, histories, and opportunities to that linked company.



A contact can be a member of multiple companies, but can only be linked to one company.

#### To link a contact to a company

1. From the **Contact Detail** window, click the browse (...) button next to the **Company** field.

The Link to Company dialog box appears.

2. Select the company you would like to link the contact to. Press **F1** for more help.

The linked contacts are now static members of the company and all of their notes, activities, etc, will appear in the tabs.



You can set a preference to automatically link contacts to their company record from the Startup tab of the Preferences dialog box.

#### To disable the company link

- 1. From the **Contact Detail** window, click the browse (...) button next to the **Company** field.
- 2. From the **Disable Company Link** message box, click **OK** to confirm that you want to disable the link.

The auto-association between the contact and the company is disabled.

# **Moving companies**

#### To move a company

- 1. Open the company record that you want to move.
- 2. From the **Groups** menu, point to **Companies**, and then click **Move Company**.
  - The Move Company dialog box appears.
- 3. Select the option for the company. You can choose to promote a division to a company or change the company to a division.
  - For field definitions press F1.

## Saving a lookup as a company

#### To save a lookup as a company

- 1. Create a lookup. See Finding contacts using a lookup for more information.
- 2. From the **Lookup** menu, point to **Companies**, and then click **Save Lookup** as **Company**.
  - A Company Detail window appears.
- 3. In the **Company** field, type a name for the new company.
- 4. (Optional) Click the **Add/Remove Contacts** button if you want to change the list of contacts from the original lookup.

## Viewing the hierarchy of companies or divisions

#### To view the hierarchy of a company or division

- On the **Company Detail** view, from the **Hierarchy** list, select a level.
- •To move up one level in the company hierarchy, click the **Up** button.
- •To view a division, in the **Divisions** box, click the division name.

In each case, the Company Detail view changes to the view for the selection, and the Hierarchy list changes to reflect that hierarchy.

## **About finding companies and company information**

Finding companies and company information is similar to finding contacts and contact information. The Lookup menu contains a Companies command with several subcommands to let you search for all companies, by name, main phone number, city, state, ZIP code, ID/status, and other company fields. All companies and divisions are searched.

## How Do I...?

Look up companies

## **Looking up companies**

#### To look up companies

1. From the **Lookup** menu, point to **Companies**, and then click one of the company subcommands. For more information about the companies commands and the types of results, see <u>Commands in the Lookup menu</u>.



If you select All Companies, the results immediately appear in the Company List window. You do not need to complete the remaining steps.

2. In the **Look in this field** box, from the list, select the field on which to search.

The list shows all company fields that you can search in the database.

3. In the **Search For** box, type the word to search for, or select a word from the list.

For example, to find all companies located in Chicago, select City from the Companies submenu and in the Search For box, type Chicago.

4. In the **For the current lookup** area, select the **Replace Lookup** option, and then click **OK**.

The search results are displayed in the Company List. If only one company is found, the Company Detail window appears.

## **About the Company List**

Use the Company List to find companies, create a new company or division, create a lookup, move a company, and add members to company. You can sort the Company List and customize the columns to fit your needs.

The results of a company lookup display in the Company List. For example, perform a lookup of companies located in the state of California. When you click OK, ACT! searches the database and the results appear in the Company List window. If only one company is found, the Company Detail window appears.

The Company List window also contains the View Groups/Companies button. Click this button to easily select a group or company for viewing.

### How do I...?

**Use the Company List Customize columns** 

# **Related Topics**

About the Contact List
About the Group List

# **Displaying the Company List**

#### **To display the Company List**

From the **View** menu, click **Company List**.

or

From the **Company Detail** window, click the **Company List** icon from the toolbar.

## Using the tabs in the Companies windows

#### **Contacts tab**

The Contacts tab appears in the Company window and shows all members of a company. From this tab, you can <u>add additional contacts or remove contacts</u> <u>from membership</u>. Use the Options menu to <u>customize the columns</u>.

#### **Documents tab**

From this tab, you can add external documents to a company or group record, such as Microsoft Excel spreadsheets. This lets you easily open and edit documents in their original application while you are working in ACT! Premium for Web Server. See <u>About the Documents tab</u> for more information.

#### **Notes tab**

By default, all notes associated with the current company appear in the Notes tab, but you can use the Dates and Select Users <u>filters to change the display of the notes</u>. From the Options menu, you can choose to customize columns, which allows you to <u>add or delete columns that display on the tab</u>. For information about working with notes, see <u>Working with notes for a contact, company or group</u>.

#### History tab

A history item is automatically generated as the result of an action such as a meeting was held, an e-mail message was sent, a file is attached to the company record, etc. You can also manually create a history item to document an action performed, such as sending a fax. From the History tab, you can use the Dates, Types, and Select Users <u>filters to change the display of the history items</u>.

#### **Activities tab**

From the Activities tab, you can view all activities scheduled with a company. You can schedule, reschedule, and sort the activities from the tab. For more information, see <u>About activities</u>.

### **Opportunities tab**

By default, all sales opportunities for a company appear in the Opportunities tab. You can filter the list by date, status, user, and contact, and create and complete opportunities. For more information see <u>About opportunities</u>.

### **Company Info tab**

The Company Info tab appears in the Company Detail window. This tab includes fields that are automatically maintained by ACT! Premium for Web Server such as the Create Date and Record Creator fields. However, you can designate a Record Manager for the company.

### **About opportunities**

An opportunity is a potential sale to a contact. You create detailed records of opportunities by specifying information such as the stage (where the opportunity is in the sales process), products and services, and closing dates, and you can also graph a pipeline that gives you an overall picture of your opportunities and where they are in the sales process. From the Opportunity List, you can access all opportunities; from the contact's, group's, or company's opportunities tab, you can access opportunities that relate to the contact, group, or company record.

Additionally, you can schedule a follow-up activity, track your sales progress using graphs and reports, and create a quote that you can print for a customer. The quote includes details for the opportunity, such as quantity, price, and total. You can also make the opportunity private so that other users cannot view it.

Opportunity history is created when you complete and close the sale, change the status or stage of the opportunity, or change the estimated closing date. History records are listed in the History tab and the Summary Report. For more information about the Summary Report, see <u>Viewing a Summary Report for an opportunity</u>.

You can view your opportunities in the Opportunity List by navigating to the list and create a lookup of specific opportunities that can be filtered. The number, weighted, and grand totals for your opportunities display in the Opportunity List status bar. The weighted total is a calculation based on the product total and the probability of closing the opportunities. The grand total is the sum of all opportunities in the list, regardless of stage.



From the Opportunity List, you can view a complete list of opportunities, even the opportunities for contacts you cannot access; however, if you do not have access to the contact, the contact name does not display.

Users with an Administrator or Manager role can customize opportunity processes, stages, and product lists, and they can change the Record Manager for another user's public opportunities.

### How do I...?

Work with opportunities

Manage process list, product list, and quote preferences

Forecast sales

# **Related Topics**

About finding contacts and contact information
About importing and exporting list items

### **Opening opportunities**

#### To open an opportunity

- From the toolbar, click the **New Opportunity** tool.
   The Opportunity dialog box appears. For field definitions, press F1.
- 2. Complete information about the opportunity.
- 3. Complete the fields in the **Products/Services** tab.
- 4. Complete the fields in the **User Fields** tab.
- 5. Complete the fields in the **Details** tab.
- 6. Complete the fields in the **Opportunity Info** tab, and then click **OK**.
- 7. To make the opportunity private so that other users cannot view it, select **Private**.
- Only the Record Manager, Administrator, or Manager can make the opportunity private.
- 8. To schedule an activity regarding the opportunity, click the **Follow Up** button.

### **Editing or deleting opportunities**

Any user who has access to the contact associated with a public opportunity can edit it. Users with an Administrator or Manager role can delete an opportunity, and users with a Standard role, who are also the Record Manager for the opportunity, can delete the opportunity. Other users cannot edit or delete private opportunities.

#### To edit an opportunity

1. Find the contact whose opportunity you are changing. For information on locating a specific contact, see <u>Looking up contacts</u>.



If the lookup found a single contact, the Contact view for that contact appears. If the lookup found multiple contacts, double-click the contact's name on the Contact List to display the Contact view.

- 2. From the **Contacts** view, click the **Opportunities** tab.
- 3. Double-click the opportunity you want to modify.

  The Opportunity dialog box appears. For field definitions, press F1.
- 4. Type or select the new information, and then click **OK**. For information on completing the Opportunity dialog box, see <u>Opening an opportunity</u>.

#### To delete an opportunity



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

1. Find the contact whose opportunity you are deleting. For information on locating a specific contact, see <u>Looking up contacts</u>.



If the lookup found a single contact, the Contact view for that contact appears. If the lookup found multiple contacts, double-click the contact's name on the Contact List to display the Contact view.

- 2. From the **Contacts** view, click the **Opportunities** tab
- 3. Select the opportunity you want to delete, and then press **DELETE**.
- 4. Click **Yes** to confirm the deletion.



When you delete an opportunity, no history is created.

### **Closing and reopening opportunities**

#### To close an opportunity

- 1. From the navigation bar, click **Opportunity List**.
- 2. Locate and double-click the opportunity you want to complete. The Opportunity dialog box appears. For field definitions, press F1.
- 3. In the **Status** box, select **Closed Won** or **Closed Lost**. The Opportunity Info tab appears.
- 4. (Optional) In the **Reason** field, type the reason for closing or deactivating the opportunity, or select a reason from the list, and then click **OK**. The outcome is recorded in the contact's or group's History tab. You cannot edit a closed opportunity.

#### To reopen a completed opportunity

- 1. From the navigation bar, click **Opportunity List**.
- 2. Locate and double-click the opportunity you want to reopen.
- 3. In the **Status** box, select **Open**. The Open tunity dialog box appears. The Open Date changes to the current date, and the Close Date changes to None. For field definitions, press F1.
- 4. Click **OK**.

### **Changing the record manager for opportunities**

By default, the record manager is the user who created the opportunity. The record manager can assign the opportunity to another user, mark it as private, or delete it. If the record manager makes the opportunity private, no other users can view it.

#### To change the record manager for an opportunity

- 1. Open an opportunity.
- 2. While in the **Opportunity Info** tab, select the record manager from the **Record Manager** list.

### Changing the estimated closing date of opportunities

#### To change the estimated close date of an opportunity

- 1. From the navigation bar, click **Opportunity List**.
- 2. Select the opportunity you want to change.
- 3. From the right-click menu, click **Edit Estimated Close Date**. The Set Estimated Close Date dialog box appears. For field definitions, press F1.
- 4. From the **New Close Date** calendar selector, select the new date, and then click **OK**.

# Adding and discounting opportunity products or services



The currency type used in opportunities is defined by the Windows regional settings when you create your database. Once the database is created, there is no way to change the currency type.

#### To add a product or service to an opportunity

- 1. Open an opportunity.
- 2. Click the **Products/Services** tab, and then click **Add**. The Add/Edit Product/Service dialog box appears.
- 3. In the **Name** list, select a product or service name, or type a product or service name.
- 4. In the **Item** # list, select the item number of the product or service.
- 5. In the **Quantity** field, type the number of units of the product or service assigned to the opportunity.
- 6. In the **Price** field, the price of the product or service from the **Manage Product List** displays, or you can type a new price for the product.
- 7. To give the product or service an adjusted price, type the adjusted price in the **Adj. Price** field.
- 8. To discount the price of the product or service by a percentage, type the percent in the **Discount** field.
- 9. To add another product or service to the opportunity, click **Add Another**, and then follow steps 3-8 again.
- 10. When you have added all products or services, click **OK**.

#### To decrease the product price

- 1. Open an opportunity.
- 2. While in the **Products/Services** tab, select a product.
- 3. In the **Adj. Price** field, type the discount amount for the product.

or

In the **Discount** field, type the discount percent for the product. For example, if you want to discount the product by 10%, type 10 in the **Discount** field.

### **Looking up opportunities**

#### To look up opportunities

1. From the **Lookup** menu, point to **Opportunities**, and then click one of the opportunities subcommands. For more information about the opportunities commands and the search results, see <u>Commands in the Lookup menu</u>.



If you select All Opportunities, the results immediately appear in the Opportunity List window. You do not need to follow the remaining steps.

- 2. In the **Search for** area, in the box, type the word to search for, or select a word from the list.
  - For example, to look up opportunities with a status of Open, in the Search for area, the box label reads Status and you would type "open".
- 3. In the **For the current lookup** area, select the **Replace Lookup** option, and then click **OK**.

The results display in the Opportunity List.

### **Viewing the Opportunity List**

You can use the Opportunity List to view all of the opportunities in the database. You can also filter opportunities to narrow the list of opportunities that display on the Opportunity List. For information on filtering opportunities, see <u>Filtering opportunities from the Opportunity List</u>. You can also export the Opportunity List to Microsoft Excel. For information on exporting the list of opportunities to Microsoft Excel, see <u>Exporting and viewing a list of opportunities</u>.

#### To view the Opportunity List

On the navigation bar, click **Opportunity List**.

A list of opportunities displays, based on the filter options. The total number of opportunities, the weighted total, and the grand total display in the status bar.

# **Printing the Opportunity List**

### To print the Opportunity List

- 1. From the navigation bar, click **Opportunity List**.
- 2. From the toolbar, click **Quick Print**.
- 3. On the **Print** dialog box, click **OK**.

### Filtering opportunities from the Opportunity List

#### To filter opportunities from the Opportunity List

1. From the navigation bar, click **Opportunity List**.



The filter options are located at the top of the Opportunity List window. As you change filter options, the Opportunity List changes to include the options you selected.

- 2. In the **Dates** list, select a date option.
- 3. In the **Status** list, select the check box for the opportunity status you want to display.
- 4. In the **Process/Stage** box, select the process and the stage you want to display.
- 5. Select the **Probability** option, and, if necessary, type the percent you want to use as the probability filter.
- 6. Select the **Total** option, and, if necessary, type the amount you want to use as the probability filter.
- 7. To display the public opportunities for specific users, click the **Select Users** button, select the contacts whose opportunities you want to view, and then click **OK**.
- 8. To display your private opportunities, click the **Options** menu, and then select **Show Private**.



Selecting Show Private displays your private opportunities only.

#### To filter opportunities using the Filter Opportunities dialog box

- 1. From the navigation bar, click **Opportunity List**.
- 2. Right-click and select **Filter Opportunities** from the shortcut menu.
- 3. In the **Dates** list, select a date option.
- 4. In the **Status** list, select the check boxes for the opportunity status you want to display.
- 5. Select the options to filter by **Process** and **Stage**.
- 6. Select the options to filter by **Probability** and **Total**.
- 7. Select the **Users** option, and if necessary, select the users from the list.
- 8. Select **Show Private** if you want to show private opportunities. For field definitions, press **F1**.



Selecting Show Private displays your private opportunities only.

### To reset your filters

- From the **Opportunity List**, click **Reset**.
- From the **Filter Opportunities** dialog box, click **Reset**.

### Filtering opportunities from the Opportunities tab

You can filter opportunities using the filter options across the top of the Opportunities tab, or you can filter opportunities by using the right-click shortcut menu and selecting Filter Opportunities. You can also <u>filter opportunities from the Opportunity List</u>.

#### To filter opportunities in a contact's Opportunities tab

1. Find the contact whose opportunities you want to filter. For information on locating a specific contact, see <u>Looking up contacts</u>.



- If the lookup found a single contact, the Contact view for that contact appears. If the lookup found multiple contacts, double-click the contact's name on the Contact List to display the Contact view.
- 2. From the **Contacts** view, click the **Opportunities** tab.
- 3. In the **Dates** list, select a date option.
- 4. In the **Status** list, select the check boxes for the opportunity status you want to display.
- 5. To display opportunities for specific users, click the **Select Users** button, select the contacts whose opportunities you want to view, and then click **OK**.
- 6. To include private opportunities, click **Options**, and then select **Show Private**.
- J

Selecting Show Private displays your private opportunities only.

#### To filter opportunities in a group's or company's Opportunities tab

- 1. Find the group or company whose opportunities you want to filter. For information on locating a specific group or company, see <u>Looking up groups</u> or <u>Looking up companies</u>.
- 2. From the **Group** or **Company** view, click the **Opportunities** tab.
- 3. In the **Show For** list, select whether you want to show opportunities for the group/company or the contacts associated with the group/company.
- 4. In the **Dates** list, select a date option.
- 5. In the **Status** list, select the check boxes for the opportunity status you want to display.
- 6. To display opportunities for specific users, click the **Select Users** button, select the contacts whose opportunities you want to view, and then click

### OK.

7. To include private opportunities, click **Options**, and then select **Show Private**.

### **Exporting and viewing a list of opportunities**

When you export a list of opportunities, you can view the list in Microsoft Excel, as well as view a pivot table and chart. The column headings and order are retained in the exported list. For assistance with viewing the list of opportunities and the pivot chart, please see the Microsoft Excel help.



You must have Microsoft Excel 2000, 2002, or 2003 installed.

#### To export a list of opportunities to Microsoft Excel

- 1. From the navigation bar, click **Opportunity List**.
- 2. <u>Filter</u> the opportunities.
- 3. From the toolbar, click the **Export to Excel** tool.

  ACT! displays the list of opportunities in Microsoft Excel.



Only one product is listed in the Product Name column of the opportunity. Opportunities with multiple products are indicated by an ellipses (...) displaying after the product in the Product Name column.

#### To view a pivot chart of the exported opportunity list

From the **Excel** window, click the **Opportunities Pivot Chart** tab.

#### To view a pivot table by record manager

From the **Excel** window, click the **Opportunities Pivot** tab.

### **Creating a quote for opportunities**



You must have Microsoft Excel and Microsoft Word 2000, 2002, or 2003 installed to generate opportunity quotes.

#### To create an opportunity quote from the Opportunity dialog box

- 1. Open an opportunity. While in the **Products/Services** tab of the opportunity, click the **Quote** button.
- 2. If you set quote preferences to prompt you for a quote number, type the number in the **Quote Number** field, and then click **OK**. For information about quote preferences, see <u>Setting quote preferences</u>.
  - ACT! generates the quote and displays it in Microsoft Word.



The quote numbers do not increment.

#### To create an opportunity quote from the Opportunity List

- 1. From the navigation bar, click the **Opportunity List** button.
- For information on filtering the opportunities that display on the list, see <u>Filtering opportunities from the Opportunity List</u>.
- 2. Select the opportunity for which you want to create a quote.
- 3. Click the **Create Quote** button.
- 4. If you set quote preferences to prompt you for a quote number, type the number in the **Quote Number** field, and then click **OK**. For information on quote preferences, see <u>Setting quote preferences</u>.
  - ACT! generates the quote and displays it in Microsoft Word.



The quote numbers do not increment.

### **Viewing opportunity history**

You create a history for an opportunity when you open, change the status or stage, generate a quote, change the estimated close date, or when you close an opportunity. You can view opportunity history from the contact's, group's, or company's History tab, and you can use the history filters to narrow the amount of histories that display. For more information on filtering history, see <u>Filtering</u> the display of notes, histories, or attachments

#### To view the history for an opportunity

From the **History** tab, double-click the opportunity whose history you want to view.

The Edit History dialog box appears. You cannot edit any of the fields on the dialog box, but you can schedule a follow-up activity for the opportunity by clicking the Follow-up button.

# **Viewing a Summary Report for an opportunity**

#### To view a Summary Report

- 1. From the navigation bar, click **Opportunity List**.
- 2. Double-click the opportunity that you want to view the history for. The Opportunity dialog box appears. For field definitions, press F1.
- 3. From the **Options** menu, click **Summary Report**. The Summary Report dialog box appears.

### **Working with an opportunity process**

You can create and work with an opportunity process that includes a list of sales stages that you customize. You can create multiple opportunity processes, and all users can access them.



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To create and work with an opportunity process

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Process List**.

For field definitions on any screen, press F1.

- 2. In the **Process Tasks** box, click **Create New Opportunity Process**.
- 3. Enter the process name and description.
- 4. From the **Customize stages for opportunity process** screen, you can do the following:
- Add, edit, or delete an opportunity stage
- Import a list of opportunity stages
- Export a list of opportunity stages
- 5. Click Finish.

### Importing and exporting product lists

If you have a product list in Microsoft Excel and want to import it into ACT!, you must first save it as a comma-delimited file. For information about saving a comma-delimited (csv) file, see Microsoft Excel's help. For more information about importing and exporting a list, see <u>About importing and exporting list</u> values.

#### To import a product list

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.

The Manage Product List dialog box appears. For field definitions, press F1.

2. Click **Import**.

The Import Products dialog box appears. For field definitions, press F1.

- 3. Click **Browse** to locate the product list you want to import, select the product, and then click **Open**.
- 4. (Optional) Select **Replace products with the same name** if you want to replace the product information of a duplicate product with the product information from the list you are importing.
- 5. (Optional) Select **Source file has column headers** if the file contains column headers.
- 6. Click **Import**.

#### To export a product list

1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.

The Manage Product List dialog box appears. For field definitions, press F1.

- 2. Click **Export**.
- 3. Browse to the folder you want to export the product list to, select the file, and then click **Save**.

### Adding, editing, and deleting items in the product list



To complete this procedure, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To add an item to the opportunity product list

- 1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
- 2. In the **Manage Product List** dialog box, click **Add**. For field definitions, press **F1**.
- 3. Type the name, item number, cost, and price of the product you are adding.

#### To edit an item in the opportunity product list

- 1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
- 2. Select the product field you want to edit, and then edit the field. For field definitions, press **F1**.

#### To delete an item from the opportunity product list

- 1. From the **Contacts** menu, point to **Opportunities**, and then click **Manage Product List**.
- 2. Select the product you want to delete, and then click **Delete**. For field definitions, press **F1**.
- 3. Click **Yes** to confirm the deletion.



You can also import or export a product list. For more information, see <a href="Importing and exporting a product list">Importing and exporting a product list</a>.

### **Creating an opportunity graph**

#### To create an opportunity graph

- 1. From the navigation bar, click **Opportunity List**.
- 2. From the toolbar, click **Opportunity Graph**.

  The Graph Options dialog box appears. For field definitions, press F1.
- 3. Complete the fields in the **General** tab.
- 4. Complete the fields in the **Graph tab**, and then click **Graph**. The Opportunities Forecast Graph appears. The date range is added on the horizontal axis. The date format is determined by the short date style in Windows Regional Settings. To change the format of the date, see Windows' online Help. For field definitions, press F1.
- 5. You can <u>save</u>, <u>copy</u>, or <u>print</u> the graph.



You can click a bar on the graph to view a lookup of the opportunities represented by the bar.

### **Creating an opportunity pipeline**

An opportunity pipeline is a visual representation of the number of opportunities at each stage in the sales development process. Each section of a pipeline represents a stage in your sales development cycle. The size of each section is fixed and does not scale based on the number of opportunities at each stage. The pipeline includes open opportunities only, not won/closed or lost opportunities.

#### To create an opportunity pipeline

- 1. From the navigation bar, click **Opportunity List**.
- 2. From the toolbar, click **Opportunity Pipeline**.

  The Opportunity Pipeline Options dialog box appears. For field definitions, press F1.
- 3. In the **Create graph for** box, select the contact or lookup option for which you want to create an opportunity pipeline.
- 4. In the **Display data for sales managed by** box, select whether to graph data for **All users** or **Selected users**, and if necessary, select the users from the list.
- 5. From the **Process list**, select the process you want to create an opportunity pipeline for.
- 6. If necessary, select a color for each stage in the sales development cycle by clicking the browse (...) button in the **Colors** column. In the **Color** dialog box, select a color, and then click **OK**.
- 7. (Optional) In the **Graph header** fields, type the details you want to include in the title of the opportunity pipeline.
- 8. (Optional) In the **Graph footer** field, type the details you want to include in the footer.
- 9. Click **Graph**.
  - The Opportunity Pipeline appears. For field definitions, press F1.
- 10. You can <u>save</u>, <u>copy</u>, or <u>print</u> the graph.
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You can click a colored band on the pipeline to view a lookup of the opportunities represented by the band.

# Changing the appearance of opportunity graphs or pipelines

#### To change the appearance of an opportunity graph or pipeline

- 1. Create an opportunity graph or pipeline.
- 2. While viewing the graph in the **Opportunities Forecast Graph** or **Opportunity Pipeline** dialog box, click **Options**.
  If you are editing an opportunity graph, the Graph Options dialog box appears. If you are editing an opportunity pipeline, the Opportunity Pipeline Options dialog box appears. For field definitions, press F1.
- 3. Select the options you want to use for the graph or pipeline, and then click **Graph**.

## **Copying opportunity graphs or pipelines**

#### To copy an opportunity graph or pipeline

- 1. Create an opportunity graph or pipeline.
- 2. While viewing the graph in the **Opportunities Forecast Graph** or **Opportunity Pipeline** dialog box, click **Copy**.

You can paste the image of the graph into an image editor of your choice.

### Creating a lookup from an opportunity pipeline

#### To create a lookup from an opportunity pipeline

- 1. Create an opportunity pipeline.
- 2. While viewing the graph in the **Opportunity Pipeline** dialog box, click **Lookup**.
  - The Lookup Stage dialog box appears. For field definitions, press F1.
- 3. To create a lookup for all of the stages in the opportunity, select **All stages**. **or** 
  - To select the stages you want to use in an opportunity lookup, select **Selected stages**, and then select the stages from the list. For information about selecting multiple items, see <u>Selecting more than one name or item</u>.



You can click a colored band on the pipeline to view a lookup of the opportunities represented by the colored band.

## Finding opportunities at each sales stage

#### To find opportunities at each stage

- 1. From the **Lookup** menu, point to **Opportunities**, and then click **Stage**. The Lookup Opportunities dialog box appears. For field definitions, press F1.
- 2. In the **Stage** field, type the stage you want to search for in your lookup, and then click **OK**.

The list of matches appears in the Opportunity List.

## Printing an opportunity graph or pipeline

### To print an opportunity graph or pipeline

- 1. Create an opportunity graph or pipeline.
- 2. While viewing the graph in the **Opportunities Forecast Graph** or **Opportunity Pipeline** dialog box, click **Print**, and then click **OK**.

# Saving opportunity graphs or pipelines

### To save an opportunity graph

- 1. Create an opportunity graph or pipeline.
- 2. While viewing the graph in the **Opportunities Forecast Graph** or **Opportunity Pipeline** dialog box, click **Save**.
- 3. In the **File name** field, type the name of the graph, and then click **Save**.

#### **About Internet Services**

ACT! Premium for Web Server's integrated Internet Services feature allows you to access an Internet browser through ACT! Premium for Web Server and provides direct links to ACT! products, service and support, and other information Web pages. To use Internet Services, you need an Internet account, an Internet Service Provider, and Microsoft Internet Explorer 5.5 or later.

From the View menu, the Internet Services command provides access to other ACT! reference and support Web sites, as well as the Best Software Corporation Web Site. From the Internet Links submenu, you have links to several reference and research sites such as MapQuest and Yahoo Search.



The reference and research sites will vary according to your country.

You can create and manage favorite Internet links to Web sites you visit frequently, such as a company intranet, and you can display those links on the ACT! Links menu. These links are like Favorites or Bookmarks in Internet Explorer, except they appear in ACT! Premium for Web Server.

You can get a map or driving directions for a contact and attach a Web page to a contact record.

When you click the Web site address for a contact, ACT! Premium for Web Server's integrated Internet Services feature opens the site in Internet Explorer.

#### How Do I...?

Access ACT! Web pages

Access reference and research sites

Attach a Web page to a contact

Display a map for a contact

Get driving directions for a contact

Create and manage favorite Internet links

Delete a favorite Internet link

Edit a favorite Internet link

Arrange the favorite Internet links list

### **Accessing ACT! Web pages**

There are several ways for you to easily access ACT! products, service and support, and other information:

- On the navigation bar, click **Internet Services**. This opens the ACT! Web site.
- From the **View** menu, point to **Internet Services**, and then click one of the following commands to access these ACT! Web site pages:

**ACT!** - Opens the ACT! Web site home page and provides log on access for members.

**ACT! Service and Support** - Opens the ACT! Service and Support page that contains help information for non-technical issues, placing orders, registration, and so on.

**ACT! Add-Ons** - Opens the ACT! Add-Ons and Solutions page that contains information on other products and services that help you use ACT!.

**ACT! Consulting** - Opens the ACT! Certified Consultants page that contains access information for the network of ACT! Certified Consultants.

**ACT! Training** - Opens the ACT! Training page that contains end-user and partner training information.

**ACT! User Community** - Opens the ACT! User Community page that contains user groups and knowledge sharing information.

**Best Software Corporation Web Site** - Opens the Best Software Corporation home page.

## **Accessing reference and research Web sites**



- •The reference and research sites will vary according to your country.
- •The Contact Detail and Contact List toolbars have a Display Map tool that you can click to open the MapQuest Maps site.

#### To access a reference or research Web site

• From the **View** menu, point to **Internet Services**, point to **Internet Links**, and then click one of the available sites.

## **Creating and managing favorite Internet links**

#### To create and manage a favorite Internet link

- 1. From the **View** menu, point to **Internet Services**, point to **ACT! Links**, and then click **Manage Links**.
- 2. In the **Manage Internet Links** dialog box, click **Add**.
- 3. In the **Add Internet Link** dialog box, in the **Internet Link name** field, type the name for the link.
- 4. In the **Web Address (URL)** field, type the full address for the Web site.
- You can navigate to the Web site, copy the URL, and then paste it in the Web Address (URL) field.
- 5. Click **OK**.

From the Manage Internet Links dialog box, you can edit a favorite link or delete a link.

# **Arranging the favorite Internet links list**

#### To arrange the favorite Internet links list

- 1. From the **View** menu, point to **Internet Services**, point to **ACT! Links**, and then click **Manage Links**.
- 2. In the **Manage Internet Links** dialog box, select a link, and then click **Move Up** or **Move Down** to arrange the list.
- 3. Repeat step 2 until the list is in the order you want, and then click **OK**.

## **Editing favorite Internet links**

#### To edit a favorite Internet link

- 1. From the **View** menu, point to **Internet Services**, point to **ACT! Links**, and then click **Manage Links**.
- 2. In the **Manage Internet Links** dialog box, select the link, and then click **Edit**.
- 3. In the **Edit Internet Link** dialog box, in the **Internet Link name** or the **Web Address (URL)** fields, type the new information, and then click **OK**.

# **Deleting favorite Internet links**

#### To delete a favorite Internet link

- 1. From the **View** menu, point to **Internet Services**, point to **ACT! Links**, and then click **Manage Links**.
- 2. In the **Manage Internet Links** dialog box, select the link, and then click **Delete**.
- 3. Click **Yes** to confirm the deletion.

To change the properties of the link, rather than delete it, see <u>Editing a favorite</u> <u>Internet link</u>.

### **Attaching Web pages to contacts**

#### To attach a Web page to a contact

- 1. Open the Web page you want to attach.
- 2. From the browser's **Tools** menu, click **Attach Web page to ACT! contact**.
- 3. In the **Attach Web page to the following Contacts** dialog box, in the **Contacts to select from** list, select one or more contacts, and then click the right arrow to move the contact names into the **Selected Contacts** list.
- 4. Click OK.

The details of the attached Web page display on the History tab for the selected contact(s). You can double-click the item to open the Edit History dialog box, and then click the link in the Attachment field to open the Web page.

### **Displaying maps for contacts**

You can display a map for a contact's address by using the Display Map tool or by using the Internet Links MapQuest Maps command.

#### To display a map for a contact using the Display Map tool

• From the **Contact Detail** window, click the **Display Map** tool.

MapQuest displays a street map according to the contact's address in the detail window.

#### To display a map for a contact using the MapQuest Maps command

- 1. From the **View** menu, point to **Internet Services**, point to **Internet Links**, and then click **MapQuest Maps**.
- 2. In the **Contact** field, you can keep the default information or select a contact from the list. For field definitions, press **F1**. The Address information is populated according to the selected contact.
- 3. To map a different address, in the **Address** field, select an address from the list or type new information in the **Street**, **City**, **State**, and **Zip Code** fields.
- 4. Click **Map It!**.
  - The MapQuest Web page opens with a street map for the address.
- 5. To save this information to the contact's History tab, from the browser's **Tools** menu, click **Attach Web page to ACT! contact**.

### **Getting driving directions for contacts**

You can get driving directions to a contact's location using the MapQuest Driving Directions dialog box. The origin location defaults to your My Record address information, and the destination location defaults to the current contact record's address information, but you can change the information for both as needed.

#### To get driving directions for a contact

- 1. From the **View** menu, point to **Internet Services**, point to **Internet Links**, and then click **MapQuest Driving Directions**.
- 2. In the **Origin** and **Destination** boxes, keep the default information or type new information. For field definitions, press **F1**.
- 3. Click **Drive It!**.
  - The MapQuest Web page opens and contains the driving directions.
- 4. To save this information to the contact's History tab, from the browser's **Tools** menu, click **Attach Web page to ACT! contact**.

### **About creating documents**

ACT! Premium for Web Server includes a word processor that you can use to write letters, memos, and fax cover sheets, or you can create these documents using Microsoft Word. You can create and personalize documents to send to single contacts or use mail merge to create documents for multiple contacts. You can also create documents that are not associated with contacts.



For information about working with documents in Microsoft Word, refer to the Microsoft Word help. For information about using the ACT! menu in word, see <u>Using the ACT! menu in Microsoft Word</u>.

ACT! Word Processor templates are provided to assist you in creating documents, labels, and templates. You can convert templates from previous versions of ACT!, modify templates, or create your own templates.

Within ACT! Premium for Web Server, once you finish your document, you can spell check the document, attach the correspondence to a contact, print the document, or attach it to an e-mail.

### How do I...?

Work with documents
Work with templates
Format documents
Print documents

## **Related topics**

About faxing
About the spelling checker
About Conversion
Specify the word processor

### **Using the ACT! menu in Microsoft Word**

You can create, edit, and delete documents in Microsoft Word. For information about working with documents in Microsoft Word, refer to the Microsoft Word help. For information about selecting the word processor application to use in ACT!, see <a href="Specifying your word processor">Specifying your word processor</a>.

#### To attach the document to a contact record

- In the Microsoft Word application, from the ACT! menu, click Attach to ACT!.
- 2. In the **Select Contacts** dialog box, select the contact whose record you want to attach the document to, click the right arrow button, and then click **OK**. For field definitions, press **F1**.

#### To send the document in an e-mail message

- 1. In the **Microsoft Word** application, from the **ACT!** menu, click **Send Email**.
- 2. In the **Send E-mail** dialog box, select an option. For field definitions, press **F1**.
- 3. In the **Select Contacts** dialog box, select the contact you want to send the e-mail message to, click the right arrow button, and then click **OK**. For field definitions, press **F1**.
  - The New Message window appears. Type the subject and make changes to it, if necessary, and then click Send.

#### To send the document in a fax

In the **Microsoft Word** application, from the **ACT!** menu, click **Send Fax**. The options for sending a fax depend on the fax software installed on your computer. For more information about the fax features and options available to you, see your fax software documentation.

## **Creating documents**

You can create a document without using a template.

#### To create a document

- From the Write menu, click New Document.
   A blank document appears in the word processor.
- 2. Type the body of the document, and then <u>save</u> it.
- 3. (Optional) Print, fax, or e-mail the document.

### **Creating documents for a single contact**

#### To write a letter, memo, or fax cover page to a single contact

- 1. Display a contact in the **Contact Detail** window. For information on locating a specific contact, see <u>Looking up contacts</u>.
- 2. From the **Write** menu, click **Letter**, **Memo**, or **Fax Cover Page** to compose the letter using a default template.
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- To select a different template, from the Write menu, click Other Document, and then select a template. For more information, see <u>Selecting a document template</u>.
- 3. Type the body of the document, and then <u>save</u> it.
- 4. (Optional) Print, fax, or e-mail the document.

## Changing the view for a document

#### To change the view for a document

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **View** menu, click **Normal** or **Page Centered**.



The Normal view displays the document without centering or spacing the text on a full page. The Page Centered view displays the page as it looks when printed.

### To change the zoom on a document



The Zoom command allows you to change the size of the document display on your computer screen. For instance, changing the zoom to 200% displays the document at twice its normal size.

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **View** menu, point to **Zoom**, and then select the percentage you want to use to enlarge or decrease the document view.

## Displaying or hiding the toolbar, ruler, and status bar



By default, the ACT! Word Processor displays the toolbar, ruler, and status bar.

The ruler format is determined by the Measurement system field in Windows Regional Settings. To change the format of the ruler, see Windows online Help.

#### To display or hide the toolbar, ruler, or status bar

- 1. If necessary, <u>open</u> the document.

  The document appears in the word processor.
- 2. From the View menu, click Toolbar, Ruler, or Status Bar.

If a check mark appears next to the command, the item will display. If no check mark appears, the item is hidden.

### **Opening word processing documents or templates**

#### To open a word processing document

•To use a template to open a document, from the **Write** menu, select the type of document you want to open: **E-mail Message**, **Letter**, **Memo**, or **Fax Cover Page**, or click **Other Document (from template)**, select a template, and then click **Open**.

The document opens in the word processor.

#### To open a word processing template

- 1. From the **Write** menu, click **Edit Template**.
- 2. Select the template you want to open, and then click **Open**. The template opens in the word processor.

## Sending documents in e-mail messages

#### To send a document in an e-mail message

- 1. Display a contact in the **Contact Detail** window. For information on locating a specific contact, see <u>Looking up contacts</u>.
- 2. Open the document that you want to send as an e-mail message. The document appears in the word processor.
- 3. From the **File** menu, click **Send**, and then select **E-mail**.

  A new e-mail message window appears with the document inserted in the body. The To field contains the e-mail address for the contact you displayed in the Contact Window.
- 4. Type a subject in the **Subject** field and edit the e-mail message as needed.
- 5. Click **Send**.

For more information about sending an e-mail message, see <u>About e-mail</u>. For information about sending a document as an attachment, see <u>Attaching a file to an e-mail message</u>.

### **Sending a document to multiple contacts**

You must use a document template to send a mail merge to multiple contacts. For more information about templates, see <u>About creating documents</u> or <u>Creating a document template</u>.

#### To write and send a document to multiple contacts

- 1. Create a lookup of the contacts to whom you want to send a document. For information on locating specific contacts, see <u>Looking up contacts</u>.
- 2. From the **Write** menu, click **Mail Merge**.
- 3. Follow the instructions on the **Mail Merge Wizard**. Press **Next** to advance through the Wizard. On any panel, press **F1** for field definitions.

When you click Finish on the Mail Merge Wizard, your document is sent as you specified.

## **Saving documents**

#### To save a document

On the toolbar, click the **Save** button.

If this is a new document, the Save As dialog box appears where you can type a file name.

#### To save a copy of a document

- 1. From the **File** menu, click **Save As**.
- 2. From the **Save in** list, select the location you want to save the file in.
- 3. In the **Save As** dialog box, type a name for your document in the **File name** field.
- 4. From the **Save as type** list, select the file type you want to use, and then click **Save**.

For information on creating a document, see <u>Creating a document</u>. For information on opening a document or template, see <u>Opening a word processing template or document</u>.

### **Formatting pages**

You can adjust the amount of space in the top, bottom, left, or right margins of the page and set page breaks. You can also create a page header or footer. Headers and footers contain text or graphics that appear at the top or bottom of a page. You can create a header or footer for the first page that is different than other pages. For example, you may want your company's logo at the top of the first page and the page number and date at the bottom of every page. You can format headers and footers just as you can any other text in your document, such as font size, text alignment, and so on.

### How do I...?

Adjust page margins
Insert and delete page breaks
Create headers and footers
Use the ruler to change margins
Insert the date or time

# **About formatting paragraphs**

You can set indentation, line spacing, and alignment options for one or more paragraphs. You can also set tab stops and change the alignment of tab stops.

### How do I...?

Format paragraphs to include indentation, line spacing, and alignment
Use the ruler to format paragraph margins
Set, remove, or modify tab stops
Use the ruler to set tab stops

# **Formatting text**

You can change the font type, style, size, and text color using tools in the ACT! word-processing toolbar. You can also use commands in the Format menu to apply styles such as strikeout, underlining, or subscript.

### How do I...?

<u>Change the font attributes</u> <u>Copy or move text</u>

# **Adjusting page margins**

### To adjust page margins in a document

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **File** menu, click **Page Setup**. The Page Setup dialog box appears.
- 3. Type the values for the **Left**, **Right**, **Top**, and **Bottom** margins, and then click **OK**.

### **Changing the font attributes in documents**

#### To change font attributes

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. In your document, select the text that you want to change.
- 3. From the **Format** menu, click **Font**. The Font dialog box appears.
- 4. To change the font type, select a type from the **Font** list.
- 5. To change the font size, select a size from the **Size** list.
- 6. To change the font style, select **Bold**, **Italic**, or **Strike out**; or select an underline option from the **Underlining** list.
- 7. In the **Position** box, select **Normal** to use normal positioning, **Superscript** to change the selected text to appear slightly above the line, or select **Subscript** to change the selected text to appear slightly below the line.
- 8. To change the text color, select a color from the **Text** list, or click **Other** to select a color not shown on the list.
- 9. To change the background color for the text, select a color from the **Text Background** list, or click **Other** to select a color not shown on the list, and then click **OK**.



To change font attributes for the entire document, click Select All from the Edit menu. You can change all of the font attributes in one location by clicking Font from the Format menu.

### **Copying or moving text**

You can move or copy a word, sentence, or block of text from one location to another.

#### To copy and paste text

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Within the document, select the text to copy.
- 3. From the **Edit** menu, click **Copy**.
- 4. Place the cursor where you want to insert the text.
- 5. From the **Edit** menu, click **Paste**.

#### To move text

- 1. If necessary, <u>open</u> the document.

  The document appears in the word processor.
- 2. Within the document, select the text to move (cut).
- 3. From the **Edit** menu, click **Cut**.
- 4. Place the cursor where you want to insert the text.
- 5. From the **Edit** menu, click **Paste**.

### **Creating and formatting bulleted lists**

#### To create and format a bulleted list

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **Format** menu, point to **Bullets and Numbering**, and then click **Attributes**.
  - The Bullets and Numbering dialog box appears.
- 3. From the **Bulleted/Numbered** box, select the bulleted list option.
- 4. From the **Bullet character** box, select the type of bullet and the font size of the bullet.
- To select a bullet not shown in the Bullet character box, click the Bullet button and select a character.
- 5. In the **Bullet/Number position** field, set the amount of space you want to use between the bullet and the text in the document.
- 6. In the **Text position** field, specify the amount of space you want to use to increase or decrease the space between the bullet and the text for the list.
- 7. In the **Separating Character** list, select **Tab** or **Space** as the separating character between the bullet and the text for the list, or select **None** to avoid using a separating character, and then click **OK**.



To increase or decrease the distance between the list and the margin, from the Format menu, click Bullets and Numbering, and then click Increase Level or Decrease Level.

## **Creating and formatting numbered lists**

#### To create and format a numbered list

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **Format** menu, point to **Bullets and Numbering**, and then click **Attributes**.
  - The Bullets and Numbering dialog box appears.
- 3. From the **Bulleted/Numbered** box, select the numbered list option.
- 4. From the **Number style** list, select the number style.
- 5. To include a character before or after the number style, from the **Character in front** list, select the character to use before the number, and from the **Character after list**, select the character you want to use after the number.
- 6. If you want to begin the list with a specific number, in the **Start at** field, type the number.
- 7. To restart the numbering in the list, select **Restart numbering**; to continue the list from the last consecutive number, select **Continue list**.
- 8. In the **Bullet/Number position** field, set the amount of space you want to use between the number in the list and the text in the document.
- 9. In the **Text position** field, specify the amount of space you want to use to increase or decrease the space between the number in the list and the text for the list.
- 10. In the **Separating Character** list, select **Tab** or **Space** as the separating character between the number in the list and the text for the list, or select **None** to avoid using a separating character, and then click **OK**.



To increase or decrease the distance between the list and the margin, from the Format menu, click Bullets and Numbering, and then click Increase Level or Decrease Level.

## **Creating headers and footers in documents**

#### To create a header or footer in a document

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **View** menu, click **Header/Footer**.
- 3. In the header, type the text you want to include, and use the **Insert** menu to insert the date, time, page number, or image. For more information on inserting the date or time, see <u>Inserting the date or time</u>. For more information on inserting an image, see <u>Inserting an image into a document</u>.
- 4. To enter information in the footer, from the shortcut menu, click **Switch**.
- 5. Type the text you want to include, and use the **Insert** menu to insert the date, time, page number, or image. For more information on inserting the date or time, see <u>Inserting the date or time</u>. For more information on inserting an image, see <u>Inserting an image into a document</u>.

# **Deleting tables, columns, or rows**

## To delete a table, column, or row

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Select the table, column, or row.
- 3. From the **Table** menu, point to **Delete**, and then click the item you want to delete: **Table**, **Column**, or **Row(s)**.

## Finding and replacing text

#### To find text

- 1. If necessary, <u>open</u> the document. The document appears in the word processor.
- 2. From the **Edit** menu, click **Find**. The Find dialog box appears.
- 3. In the **Find what** field, type the word or phrase you want to search for.
- 4. Select whether to search the document from the insertion point to the beginning of the document, **Up**, or from the insertion point to the end of the document, **Down**.
- 5. (Optional) To search for words on a case-sensitive basis, select **Match case**.
- 6. Click **Find Next** to locate the next instance of the word or phrase.

### To find and replace text

- 1. If necessary, <u>open</u> the document. The document appears in the word processor.
- 2. From the **Edit** menu, click **Replace**.

The Replace dialog box appears.

- 3. In the **Find what** field, type the word or phrase you want to search for.
- 4. In the **Replace with** field, type the word or phrase that will replace the text you specified in the **Find what** field.
- 5. Select whether to search the document from the insertion point to the beginning of the document, **Up**, or from the insertion point to the end of the document, **Down**.
- 6. (Optional) To search for words on a case-sensitive basis, select **Match case**.
- 7. Click **Find Next** to locate the next instance of the word or phrase, and then click **Replace**.

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Click **Replace All** to replace all instances of the specified text.



You cannot undo a Replace All operation.

## Formatting paragraphs

Options for formatting a paragraph differ depending on whether the "in inches" box is selected in the Paragraph dialog box. If the "in inches" box is selected, you can choose an option based on inches. If the "in inches" box is cleared, you can choose an option based on number of lines between lines of text.

### To format a paragraph

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. In your document, select the paragraph that you want to format.
- 3. From the **Format** menu, click **Paragraph**. The Paragraph dialog box appears.
- 4. In the **Line spacing** box, if the **in inches** box is cleared, select **Single line** to use a single line for the space between paragraphs, **One and a half lines** to use a line and a half between paragraphs, **Two lines** to use two lines between paragraphs, or specify the number of lines by typing the number in the **Free** field; otherwise, if the **in inches** box is selected, select a measurement to use between paragraphs.
- 5. In the **Alignment** box, select **Left** to align text to the left, **Right** to align text to the right, **Centered** to center the text, or **Justified** to make the text justified on each side.
- 6. In the **Indents** box, specify the amount of space to indent from the **Left**, **Right**, and for the **First line** of the paragraph.
- 7. In the **Distances** box, specify the amount of space before the **Top** of the paragraph and after the **Bottom** of the paragraph.



You can change the paragraph alignment by selecting one of the alignment buttons on the toolbar.

## **Formatting tables**

### To format table properties

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Select the table you want to format.
- 3. From the **Table** menu, click **Table Properties**. The Table Properties dialog box appears.
- 4. From the **Line Width** list, select the width you want to use for the line.
- 5. From the **Background** box, select whether to avoid using a background (**None**), select your own background from the **User Defined** list, or click **Other** to select a color not on the **User Defined** list.
- 6. Select the alignment option you want to use for aligning the table on the page: **Top**, **Center**, or **Bottom**.
- 7. From the **Text Distances** box, select the distance you want to use between the text and the **Right** margin, **Left** margin, **Top** margin, and **Bottom** margin of the table, and then click **OK**.

# **Inserting files into documents**

### To insert a file

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Position the cursor where you want to insert the file.
- 3. From the **Insert** menu, click **File**.
- 4. In the **Open** dialog box, locate the file, and then click **Open**. The text from the file appears at the insertion point. You can use the buttons on the toolbar to format the document.

# **Inserting hyperlinks into documents**

## To insert a hyperlink into a document

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Position the cursor where you want to insert the hyperlink.
- 3. From the **Insert** menu, click **Hyperlink**.
- 4. In the **Linked Text** field, type the text you want to use as the hyperlink.
- 5. In the **Linked To** field, type the URL, and then click **OK**.

# **Inserting page numbers into documents**

## To insert a page number

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **Insert** menu, click **Page Number**.

## **Inserting tables into documents**

#### To insert a table into a document

- 1. If necessary, open the document.
  - The document appears in the word processor.
- 2. From the **Table** menu, point to **Insert**, and then click **Table**. The Insert Table dialog box appears.
- 3. In the **Number of Columns** field, click the up or down arrows to specify the number of columns to use in the table.
- 4. In the **Number of Rows** field, click the up or down arrows to specify the number of rows to use in the table, and then click **OK**.
- For information about formatting a table, see <u>Formatting a table</u>.

#### To insert columns or rows into a table

- •To insert a column to the right or left of a cell, position your cursor in one of the cells, and from the **Table** menu, click **Insert**, and then click **To the Left** or **To the Right**.
- •To insert a row above or below a cell, position your cursor in one of the cells, and from the **Table** menu, click **Insert**, and then click **Above** or **Below**.

## **Inserting images into documents**

### To insert an image

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Position the cursor where you want to insert the image.
- 3. From the **Insert** menu, point to **Image**, and then select **Fixed Position** to insert an image that remains at the insertion point (text wraps around the image), or select **Character Position** to insert an image that moves with the text.
- 4. In the **Open** dialog box, locate the file, and then click **Open**.



You can resize a Fixed Position image, but you cannot resize a Character Position image. For more information, see <u>Resizing an image in a document</u>.

# **Inserting and deleting page breaks**

## To insert a page break

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Place the cursor where you want to start a new page.
- 3. From the **Insert** menu, click **Page Break**.

## To delete a page break

Place your cursor at the bottom of the page, before the page break, and then press **DELETE**.

## Inserting the date or time into documents

#### To insert the date

1. If necessary, open the document.

The document appears in the word processor.

2. From the **Insert** menu, click **Date**.

The Insert Date dialog box appears.

- 3. Specify the date format by selecting **Short** to numerically format the date or **Long** to use the day of the week and the month in the date.
- 4. Specify an update option for the document by selecting **Always update in document** to always update the document or **Never update in document** to never update the document, and then click **OK**.

#### To insert the time

1. If necessary, <u>open</u> the document.

The document appears in the word processor.

2. From the **Insert** menu, click **Time**.

The Insert Time dialog box appears.

3. Specify an update option for the document by selecting **Always update in document** to always update the document or **Never update in document** to never update the document, and then click **OK**.

## **Modifying headers and footers in documents**

## To modify header and footer settings

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. From the **Format** menu, click **Header/Footer Settings**. The Header and Footer Settings dialog box appears.
- 3. In the **Header** field, use the up or down arrows to specify the distance between the header and the top margin.
- 4. In the **Footer** field, use the up or down arrows to specify the distance between the footer and the bottom margin.
- 5. To set a different header or footer for the first page of the document, select **First page different**.

# **Resizing images in documents**

You can resize a Fixed Position image, but you cannot resize a Character Position image.

## To resize a fixed position image

- If necessary, <u>open</u> the document.
   The document appears in the word processor.
- 2. Press and hold the **ALT** key and then hold your mouse over the border of the image until a double-sided arrow appears. Do not select the image first.
- 3. Drag the mouse to expand or contract the image to the desired size.

## **Setting and clearing tab stops**

You can set a tab stop for the entire document, the line at the insertion point, or for a selected section of text.

### To set a tab stop

- 1. If necessary, open the document.
  - The document appears in the word processor.
- 2. Position the cursor on the line where you want to set the tab, select the area for which you want to set the tab, or press **CTRL**+**A** to set a tab for the entire document.
- 3. From the **Format** menu, click **Tab**.
  - The Tabs dialog box appears.
- 4. In the **Tab stop position** field, type the number you want to use for the tab stop.
- 5. From the **Alignment** box, align the tab **Left**, **Center**, or **Right**.
- 6. Click **Set**, and then click **OK**.

### To clear a tab stop

- 1. From the **Format** menu, click **Tab**.
  - The Tabs dialog box appears.
- 2. From the list of tabs, select the tab, and then click **Clear**.



To clear all tab stops, click Clear All.

## Using the word processing ruler

You can use the ruler on the ACT! word processor to change margins or to set tab stops. To view the ruler, from the View menu, select Ruler.

The ruler format is determined by the Measurement system field in Windows Regional Settings. To change the format of the ruler, see Windows online Help.

### To change margins from the ruler

- 1. If necessary, <u>open</u> the document.

  The document appears in the word processor.
- 2. Select the paragraph to which you want to apply the margins, or press **CTRL**+**A** to select the entire document.
- 3. Drag the right or left margin marker to a new position. The margin marker displays as an arrow above the ruler.

## To set tab stops from the ruler

- 1. If necessary, <u>open</u> the document.

  The document appears in the word processor.
- 2. Place the cursor in the paragraph where you want to set a tab, or press **CTRL**+**A** to select the entire document.
- 3. Click the location in the ruler where you want to place a tab.

#### To move a tab

Select the tab, and then drag it to a new location on the ruler.

#### To remove a tab

Select the tab and drag it off the ruler.

## **Creating document templates**

You can create a template as a simple form letter or to use for a mail merge when sending multiple contacts the same document; however, it is easier to modify an existing template than to create a new template.



When creating or editing documents in Microsoft Word, display all nonprinting characters such as paragraph marks and tab characters to avoid deleting hidden text required by ACT!.

### To create a document template

- 1. From the **Write** menu, click **New Letter/E-mail Template**.

  A blank template appears in the word processor, and the Add Mail Merge Fields dialog box is located on the right panel of the screen.
- 2. From the **Select Field Type** list, select the field type you want to use for inserting fields: **Contact Fields**, **My Record Fields**, or **Field Label**.
- 3. From the list of fields, select the field you want to add to your template, and then click **Add**. Continue inserting fields, making sure you change field types as necessary.



When you add fields, they display in a single line in the template. To position the fields in specific areas in the template, place your cursor in the template where you want to place the field, select the field, and then click Add.

- 4. Arrange the fields as you want them to display on your document and include the necessary spaces and punctuation.
- 5. Type the body of the document and format it as needed.
- 6. When you are finished, save your template.

#### To delete fields

Select the field to delete, and then press **DELETE**.

# **Selecting document templates**

When you write a letter to a contact, a default document template displays in the word processor. You can use the following procedure to choose other document templates.



If you want to edit the template, follow the procedures in <u>Editing a document template</u>.

## To select other document templates

- 1. From the **Write** menu, click **Other Document (from template)**.
- 2. In the **Open** dialog box, select a template from the list, and then click **Open**.



If the template is not displayed in the list, browse your directory from the Look in list.

## **Creating label templates**

You can create a label template to use when printing labels for your documents. You create the label template using the Report Designer, and then you can use the template to print the labels. For more information about the Report Designer, see <u>About report templates and the Report Designer</u>.



It is generally easier to modify an existing template than to create a new one. For more information, see <u>Modifying a label or envelope template</u>.

### To create a new label template

- 1. From the **Reports** menu, click **New Template**.
  - The New Report dialog box appears from the Report Designer. In the Report Types box, Contact Reports is selected by default. For field definitions, press F1.
- 2. In the **Templates** box, select **Contact Labels**, and then click **OK**. The Create Label dialog box appears. For field definitions, press F1.
- 3. From the **Choose a label product** list, select a label type and size from the list, or customize a label by clicking **Custom**.



- When you select a label from the list, the settings for the label appear in the Page Margins, Label Size, Space Between Labels, Number of Labels, and Page Orientation boxes.
- 4. (Optional) Specify the values for the **Page Margins**, **Label Size**, **Space Between Labels**, **Number of Labels**, and the **Page Orientation**, and then click **OK**.
  - A blank label template appears in the Report Designer. You can add fields to use in your template. For more information about adding fields, see <a href="Adding a field and field label to a report template">Adding a field and field label to a report template</a>.
- 5. From the **Toolbox**, click **Field**.
- 6. Position your cursor on the template where you want to add the field, and then hold down the left mouse button and drag the pointer to define the field's size.

The Select Field dialog box appears. For field definitions, press F1.

When you add a field to a template, you have the option of adding a field label at the same time. If you add a field label to an envelope or label template, it will display when you generate the envelope or label as a document. For a label, you probably do not want to include a field



- label. To prevent the field label from displaying, on the Select Field dialog box, clear the Add a field label check box.
- 7. Select a field to add, clear the **Add a field label** check box, and then click **Add**.
- 8. Continue to add fields as needed, and then click **Close** when you are finished.
- 9. <u>Save</u> the template.

## **Creating envelope templates**

You can create an envelope template to use when printing envelopes. You create the envelope template using the Report Designer, and then you can use the template to print the envelopes. For more information about the Report Designer, see <u>About report templates and the Report Designer</u>.



It is generally easier to modify an existing template than to create a new one. For more information, see <u>Modifying a label or envelope template</u>.

### To create a new envelope template

- 1. From the **Reports** menu, click **New Template**.
  - The New Report dialog box appears from the Report Designer. In the Report Types box, Contact Reports is selected by default. For field definitions, press F1.
- 2. From the **Templates** box, select **Contact Envelopes**, and then click **OK**. The New Envelope dialog box appears. For field definitions, press F1.
- 3. From the **Select an envelope size** list, select **Custom**.
- 4. (Optional) Specify the values for the **Envelope Size**, and then click **OK**. A blank envelope template appears in the Report Designer. You can add fields to use in your template. For more information about adding fields, see Adding a field and field label to a report template.
- 5. From the **Toolbox**, click **Field**.
- 6. Position your cursor on the template where you want to add the field, and then hold down the left mouse button and drag the pointer to define the field's size.
  - The Select Field dialog box appears. For field definitions, press F1.
    - When you add a field to a template, you have the option of adding a field label at the same time. If you add a field label to an envelope template, it will display when you generate the envelope as a document. For an envelope, you probably do not want to include a field label. To prevent the field label from displaying, on the Select Field dialog box, clear the Add a field label check box.
- 7. Select a field to add, clear the **Add a field label** check box, and then click **Add**.
- 8. Continue to add fields as needed, and then click **Close** when you are

## finished.

9. <u>Save</u> the template.

## **Editing document templates**

### To edit a document template

- 1. From the **Write** menu, click **Edit Template**.
- 2. In the **Open** dialog box, select a template from the list, and then click **Open**.
- 3. Edit the template using the following methods:
- Add mail merge fields by selecting each from the Add Mail Merge Fields list and then clicking Add.
- Delete fields by selecting the text and then pressing **DELETE**.
- Add text by placing the cursor where you want, and then begin typing. You can format the text as you type.
- 4. Save your changes.



For more information about Mail Merge Fields, see <u>Creating a document template</u>.

## **Editing the opportunity quote template**

The opportunity quote template contains Microsoft Word formatting and an embedded Microsoft Excel table. You can edit and save changes to the Microsoft Word portion of the template, but any changes made to the Microsoft Excel table will not be saved.



To edit an opportunity quote template, you must select Microsoft Word as your preferred word processor. For more information about selecting your word processor, see <u>Specifying your word processor</u>.

## To edit the opportunity quote template

- 1. From the **Write** menu, click **Edit Template**.
- 2. In the **Open** dialog box, select **Quote.adt**, and then click **Open**.
- 3. Edit the template using the following methods:
- Add mail merge fields by selecting each from the Add Mail Merge Fields list, and then clicking Add.
- Delete fields by selecting the text, and then pressing **DELETE**.
- Add text by placing the cursor where you want, and then begin typing.
   You can format the text as you type.
- 4. Click Save.



Do not change the name of the opportunity quote template. If you change the name, you will not be able to generate an opportunity quote.

# **Editing label or envelope templates**

### To edit a label or envelope template

- 1. From the **Reports** menu, click **Edit Template**.
- 2. In the **Open** dialog box, from the Files of type list, select **ACT! Envelope Files** or **ACT! Label Files**.
- 3. Select a template from the list, and then click **Open**.

  The template appears in the Report Designer. You can add or edit fields to use in your template. For more information, see <u>Adding a field and field label to a report template</u> and <u>Removing a field or field label from a report template</u>.
- 4. <u>Save</u> the template.

## **Printing documents**

### To print a document

1. If necessary, open the document that you want to print.

The document appears in the word processor.

2. On the toolbar, click the **Print** button.

The Create History dialog box appears. For field definitions, press F1.

3. To create a history for the document, select **Yes, record history**, type a subject in the **Regarding** field, and, if you want to attach the document to history, select **Attach document to history**.

or

To skip creating history, select **No, do not record history**.

4. Click **OK**.

## **Printing a document for multiple contacts**

### To print a document for multiple contacts

- 1. (Optional) Create a lookup of the contacts to whom you want to send a printed document. For information on locating specific contacts, see <a href="Looking up contacts">Looking up contacts</a>.
- 2. From the **Write** menu, click **Mail Merge**.
- 3. Follow the instructions on the **Mail Merge Wizard**. Press **Next** to advance through the Wizard. On any panel, press **F1** for field definitions.

When you click Finish on the Mail Merge Wizard, your document is sent to the printer.

## **Printing fax cover pages**

### To print a fax cover page

- 1. Display the record of the contact to whom you want to send a fax.
- 2. From the **Write** menu, click **Fax Cover Page**.

  A cover page addressed to the current contact appears in your default word processor. This may take a few seconds.
- 3. Make any changes to the cover page and type the subject of the fax.
- 4. From the toolbar, click the **Print** button.

  The Create History dialog box appears. For field definitions, press F1.
- 5. To create a history for the document, select **Yes, record history**, type a subject in the **Regarding** field, and, if you want to attach the document to history, select **Attach document to history**.

or

To skip creating history, select **No, do not record history**.

6. Click **OK**.

## **Printing mailing labels and envelopes**

## To print a mailing label or envelope

- From the **File** menu, click **Print**.
   The Print dialog box appears. For field definitions, press F1.
- 2. From the **Printout Type** list, select **Labels** or **Envelopes**.
- 3. From the **Paper Type** list, select a paper type.
- 4. Click Print.
  - The Define Filters dialog box appears. For field definitions, press F1.
- 5. Select the options you want to use to filter information on the report, and then click **OK**. For more information about defining filters on a report, see Running a report.
- 6. On the **Print Preview** window, click **Print**, and then click **OK**.



You can also edit the template before printing the mailing label or envelope. To edit a report template, click the Edit Template button. For more information about modifying report templates, see <a href="Modifying a report template">Modifying a report template</a>.

## **About the Documents tab**

You can use the Documents tab in ACT! Premium for Web Server to keep important documents close at hand. All users that have access to see a contact, group, or company can see the documents stored on the Documents tab. When you add a document to the Documents tab, you attach it to a specific contact, group, or company. You can attach any type of document to the Documents tab. You can open the document from within ACT! Premium for Web Server and view and edit it in the application it was created. To view or edit a document, the program in which the document was created must be installed on your computer. For example, if you use an Excel spreadsheet to track a contact's sales data, and Excel is installed on your computer, you can browse for the spreadsheet from the Documents tab and attach it to the contact record. You can open it, make changes, or add data from within ACT! Premium for Web Server. When you save the spreadsheet, it is saved in Excel.



You can add any type of file to the Documents tab, but you can only edit and print documents that were created using an application that is currently installed on your system.

## How do I...?

Add files to the Documents tab

Edit documents in the Documents tab

Remove documents from the Documents tab

Print documents from the Documents tab

Attaching documents to email

# **Related Topics**

Mapping ACT! Premium for Web Server records to Excel spreadsheets

## Adding files to the Documents tab

You can link contracts, presentations, inventories, invoices, and more to one or several contacts, groups, or companies by adding them to the Documents tab.



You can add any type of file to the Documents tab, but you can only edit and print files created in an application that is currently installed on your system.

### To add a document to a contact, group, or company record

- 1. Display the contact, group, or company record to which you want to add a document.
- 2. Click the **Documents** tab.
- 3. On the **Documents** tab, click **Add Document**.
- 4. In the **Attach File** dialog box, browse to the document you want to add, and then click **Open**.

ACT! Premium for Web Server adds the document to your ACT! database, creates a link between the document and the current record, and displays the file Name, Size, File Type, and Date Modified on the Documents tab.



A faster way to add a file to the Documents tab is to use Windows Explorer to browse to the file, and then drag it to the tab.



If you add an Excel spreadsheet to the Documents tab and you have Excel installed, you can <u>merge values from ACT!</u> into the Excel spreadsheet.

# **Editing documents from the Documents tab**

You can modify Documents tab files associated with a contact, group, or company record without leaving ACT! Premium for Web Server.



You can only edit a Documents tab file if it was created using an application that is currently installed on your system.

## To edit a document in a contact, group, or company record

- 1. Click the **Documents** tab.
- 2. Select the document you want to change, and then click **Edit Document**. ACT! Premium for Web Server opens the document and the application that was used to create it.
- 3. Modify the document, and then save and close it.

## **Attaching Documents tab files to e-mail messages**

### To attach a Documents tab file to an outgoing e-mail

- 1. Create an e-mail message.
- 2. In the **New Message** dialog box, click the **Attach File** button.
- 3. In the **Insert File Attachment** dialog box, browse to the **Attachments** folder for the database you are currently using.
- 4. Select the file you want to attach, and then click **Open**.

  ACT! attaches the file to the new message. When you send the message,
  ACT! records the e-mail on the History tab, including the attachment, if you selected that option in your <u>E-mail Preferences</u>.

## **Mapping ACT! records to Excel spreadsheets**

If you have added an Excel spreadsheet to the Documents tab, you can map cells in the Excel spreadsheet to ACT! contacts, groups, or companies.

### To map ACT! fields to an Excel spreadsheet

1. Click the **Documents** tab, select a spreadsheet, and then click **Edit Document**.

ACT! opens the document in Excel.

- 2. Select the Excel cell you want to map to an ACT! field, and then on the ACT! menu, click **Map to Contact**, **Map to Groups**, or **Map to Companies**, as applicable.
- 3. In the **Map fields** dialog box, from the available ACT! fields list, select the field to map, and then click **Add**.

The ACT! field name appears in angle brackets in the Excel cell.

- 4. Repeat steps 2 and 3 to map more ACT! fields to the Excel spreadsheet.
- 5. Save the Excel document.
- 6. Click **Close** when you are finished.
- 7. Click Map to Excel to update the fields in the document.

### To delete field mapping

 Select a field name from the Currently Mapped Fields list in the ACT!/Excel Field Mapping dialog box, and then click Delete.

0r

Click Clear All.

# **Removing documents from the Documents tab**

You may want to remove documents on this tab.

### To remove a document from a contact, group, or company record

- 1. Display the contact, group, or company record.
- 2. Click the **Documents** tab.
- 3. In the document list, select the document you want to remove, and then click **Remove Document**.
- 4. To confirm deletion, click **Yes**.

ACT! Premium for Web Server removes the association between the document and the current record.

Unless a document is on the Documents tab of another record, removing a document from the Documents tab deletes it permanently from the ACT! Premium for Web Server database. If you don't have a copy of the file outside of ACT! Premium for Web Server and want to keep it, use the Edit Document feature to open it, and then save it to a folder outside of ACT! Premium for Web Server.



# **Printing documents from the Documents tab**



You can only print documents from the Documents tab that were created in an application that is currently installed on your system and supported by ACT! Premium for Web Server.

### To print a document from a contact, group, or company record

- 1. On the **Documents** tab, in the document list, select a document to print.
- 2. Click **Edit Document**.
  - ACT! Premium for Web Server opens the document and the application used to create it in a new window.
- 3. From the document application, print the document.

# **About faxing**

ACT! Premium for Web Server supports the integration of third-party fax applications. The fax features available to you through ACT! Premium for Web Server are limited by the fax software product you select.

You can fax many of the documents that you can print in ACT! Premium for Web Server. You can fax reports, letters, proposals, quotes, or any Microsoft Word or ACT! word processor file. ACT! Premium for Web Server retrieves the contact's fax number from your address book. If your fax software supports it, you can output a mail merge to the fax software, sending one document to multiple recipients in a single process.

Before you can fax documents from ACT! Premium for Web Server, you must install and configure a fax modem and software.

### How do I...?

Set up my fax software for use with ACT! Premium for Web Server Create and send a cover page

Fax a document to a single contact

Fax a document to multiple contacts

Fax a calendar view, address book, or report

## Faxing documents to a single contact

Word processing documents created in ACT! Premium for Web Server can be faxed to any of the contacts in your database. You can also fax Microsoft Word documents and documents on the Documents tab of a contact, company, or group record.

#### To fax an ACT! Word Processor document to a single contact

- 1. Open the document you want to fax.
- 2. In the ACT! Word Processor, on the toolbar, click the **Send Fax** button.

### To fax a Microsoft Word document to a single contact

- 1. Open the document you want to fax.
- 2. In Microsoft Word, from the **File** menu, point to **Send To**, and then click **Fax Recipient**.

Word's Fax Wizard appears. Follow the instructions in the Wizard to complete the process.

### To fax a document from the Documents tab to a single contact

- 1. Open the document you want to fax.
- 2. In the document application, on the **File** menu, click **Print**.
- 3. In the printer **Name** box, select the name of your fax software, and then click **OK**.



Your fax software may display additional dialog boxes to complete the fax process. For more information, refer to your fax software documentation.

## **Faxing documents to multiple contacts**



To fax a document, you must have the appropriate software set up. For more information about setting up your fax software, see <u>Setting up fax software for ACT! Premium for Web Server</u>.

### To send a fax mail merge

- 1. (Optional) Create a lookup of the contacts to whom you want to fax a document. For information on locating specific contacts, see <u>Looking up</u> contacts.
- 2. From the **Write** menu, click **Mail Merge**.
- 3. In the **Mail Merge Wizard**, follow the instructions on each panel, pressing **Next** to advance. On the **Select Output** panel, be sure to select **Fax**. When you complete the Mail Merge Wizard, ACT! Premium for Web Server sends your document to the fax.



Your fax software may display additional dialog boxes to complete the fax process. For more information, refer to your fax software documentation.

## Faxing calendar views, address books, and reports

You can fax a daily, weekly, or monthly calendar view of your scheduled activities, events, and tasks. You can also fax the contents of your address book and ACT! Premium for Web Server reports.

### To fax a calendar view, address book, or report

- 1. From the **File** menu, click **Print**.
- 2. From the **Printout Type** list, select **Day Calendar**, **Week Calendar**, **Month Calendar**, or **Address Book**.
- 3. From the **Paper Type** list, select the type of paper you want to use.
- 4. To preview the fax before sending, select **Enable Preview**.
- 5. (Optional, calendars and address books only) To set calendar or address book options for the fax, click **Options**.
  - The Options dialog box appears. For field definitions, press F1.
- 6. (Optional, calendars only) To set calendar activity filters, in the **Options** dialog box, click **Filters**.
  - The Filter Calendar Printout dialog box appears. For field definitions, press F1.
- 7. Click **Print.**
- 8. From the Print dialog box in the **Name** list, select the name of your fax software, and then click **OK**.
  - The calendar view, address book, or report is sent to your fax software.



Your fax software may display additional dialog boxes to complete the fax process. For more information, refer to your fax software documentation.

# **About the spelling checker**

The spelling checker scans ACT! Word Processor documents or templates, email messages, notes, histories, activities, and opportunities for errors in spelling. You can check the spelling in individual fields within the Contact Detail view, Group Detail view, and Company Detail view. The spelling checker compares the words in your ACT! text item to words in a standard dictionary file (Main.dct) and a user dictionary file. The spelling checker can suggest alternate spellings and words.

You can set your spelling preferences to initiate a spelling check automatically each time you create or edit an activity, history item, note, or opportunity. You can enable the auto-suggestion feature, select and modify dictionaries, and choose types of words to ignore.

You can maintain the user dictionary as a custom dictionary for proper nouns and technical terms unique to your business. If you want the spelling checker to accept the proper names of individuals, companies, and products you frequently refer to in documents and communication, you can add these words to the user dictionary.

You can create additional user dictionaries for the spelling checker. However, the spelling checker uses the standard dictionary file and only one user dictionary file when checking spelling. If you want to use a different user dictionary, you must select it in Spelling Preferences.

### How do I...?

Set spelling preferences Check spelling in ACT! Work with dictionaries

# Selecting the main dictionary file

ACT! spelling checker searches a standard or "main" dictionary when performing a spell check.

### To select the main dictionary file

- 1. From the **Tools** menu, click **Preferences**, and then click the **Communication** tab.
- 2. Click **Spelling Preferences**.
- 3. Under Select main dictionary, click Browse.
- 4. From the list of dictionary files in the **Spell** folder, select the one you want to use for your main dictionary, and then click **Open**.



The default main dictionary file is called Main.dct. Do not change this selection unless you have installed another standard dictionary file.

# Creating and selecting a custom user dictionary file

If your industry uses many technical terms that are not found in a standard spelling check dictionary, you can create a custom user dictionary file that contains the industry terminology for your business.

### To create and select a custom user dictionary file

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Communication** tab, click **Spelling Preferences**.
- 3. Under **Select user dictionary**, click **New**.
- 4. In the **New User Dictionary** dialog box, in the **File name** field, type a new file name with the extension .dic (such as "aerospace.dic"), and then click **Open**.
- 5. Click **OK**.

# Viewing or modifying the contents of a user dictionary file

You can maintain a user dictionary file by adding valid words that are frequently flagged as incorrect during spell checking. Also, you can delete words in a user dictionary that you no longer want to skip or that were added accidentally during a spelling check.

### To view or modify the contents of a user dictionary file

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Communication** tab, click **Spelling Preferences**.
- 3. Under **Select user dictionary**, do one of the following:
- If you have created a custom user dictionary, click **Browse** to locate the file, select the file, and then click **Open**.
- If you are using the user dictionary file that was installed with ACT! Premium for Web Server, go to the next step.
- 4. Click Modify.
- 5. In the **Modify Dictionary File** dialog box, ensure the correct dictionary name appears in the title.
- 6. To add a word to the dictionary, in the **Word** field, type a word, and then click **Add**.
- 7. Repeat step 6 to add additional words.
- 8. To remove a word from the dictionary, in the **Dictionary** list, select the word you want to remove, and then click **Delete**.
- 9. Repeat step 8 to remove additional words.
- 10. Click **OK**.

# **Locating the dictionary folder**

All dictionaries used in ACT! Premium for Web Server reside in a folder called Spell. If you create or install a custom dictionary, you must store it in this folder. If you want to create or install a custom dictionary, the file must be stored here.

### To locate the dictionary folder (Spell)

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **Communication** tab, click **Spelling Preferences.**
- 3. Under **Select main dictionary**, click **Browse**. The Open file dialog box opens and displays the Spell folder.
- 4. In the **Look in** box, click the down arrow to view the location of the **Spell** folder.

# Checking spelling in ACT! Word Processor documents or templates

You can use the spelling checker feature to identify spelling errors and suggest replacement words.



To check spelling in a Microsoft Word document, template, or quote, refer to Microsoft Word Help.

### To check spelling in an ACT! Word Processor document or template

- 1. Open the document or template.
- 2. To check the entire document, from the **Spelling** menu, click **Check Document**.

or

To check a portion of the document, select the text you want to check, and then from the **Spelling** menu, click **Check Selection**.

- 3. If the Spell Check finds an unrecognized word, a replacement word appears in the **Replace with** field. Do one of the following:
- To replace the word with the one in the **Replace with** field, or with one of the suggested words, in **Suggestions**, select an alternate word, and then click **Replace**.
- To do nothing, click **Skip**.
- To add the unrecognized word to a dictionary, click Add.
- To cancel the spelling check, click **Cancel**.
- 4. Repeat step 3 until the **Spelling Check Status** message appears and indicates that the check is complete.

# **Checking spelling in opportunities or activities**

You can use the spelling checker feature to identify spelling errors on the Details tab for an opportunity or an activity.



You can set up spelling preferences to initiate a spelling check automatically each time you create or edit an activity or opportunity. See <u>Setting spelling preferences</u>.

### To check spelling in an opportunity or activity record

- 1. In the **Opportunity** / **Schedule Activity** dialog box, click the **Details** tab.
- 2. Click the **Check Spelling** tool.
- 3. If the Spell Check finds an unrecognized word, a replacement word appears in the **Replace with** field. Do one of the following:
- To replace the word with the one in the **Replace with** field, or with one of the suggested words, in **Suggestions**, select an alternate word, and then click **Replace**.
- To do nothing, click Skip.
- To add the unrecognized word to a dictionary, click **Add**.
- To cancel the spelling check, click **Cancel**.
- 4. Repeat step 3 until the **Spelling Check Status message** appears and indicates that the check is complete.

# **Checking spelling in notes or history items**

You can use the spelling check feature to identify spelling errors in the Details portions of a note or history item.



You can set up spelling preferences to initiate a spelling check automatically each time you create or edit a note or history item. See <u>Setting spelling preferences</u>.

### To check spelling in a note or history item

- When creating a note or history item, in the **Insert Note** or **Record History** dialog box, type the details of the note or history item, and then click the **Check Spelling** tool.
- When editing a note or history item, in the **Edit Note** or **Edit History** dialog box, click the **Check Spelling** tool.
- 1. If the Spell Check finds an unrecognized word, a replacement word appears in the **Replace with** field. Do one of the following:
  - To replace the word with the one in the **Replace with** field, or with one of the suggested words, in **Suggestions**, select an alternate word, and then click **Replace**.
- To do nothing, click **Skip**.
- To add the unrecognized word to the custom user dictionary, click Add.
- To cancel the spelling check, click Cancel.
- 2. Repeat step 1 until the **Spelling Check Status** message appears and indicates that the check is complete.

# **Checking spelling in quotes**

You can check the spelling in a quote before sending it to the contact or company.



A quote is a Microsoft Word document. You can check the document for spelling errors using Word's Spelling and Grammar feature. See Word's online Help for more information.

### **About ACT! Premium for Web Server e-mail**

ACT! Premium for Web Server's e-mail feature lets you use your existing e-mail program with ACT! Premium for Web Server. You can address, create, and send e-mail messages from within ACT! Premium for Web Server using one of the following e-mail systems:

- Microsoft Outlook 2000, 2002 or 2003
- Outlook Express 5.5 or 6.0
- €udora version 5.2 or 6.0
- Internet e-mail. You do not need e-mail software in addition to ACT! Premium for Web Server; however, you do need Internet access. ACT! Premium for Web Server includes a built-in SMTP/POP3 e-mail client that can be used for Internet e-mail.



Due to limitations in Outlook Express and Eudora, some of ACT! Premium for Web Server's e-mail features are not available if you use those systems with ACT! Premium for Web Server. For more information, see <u>Using Outlook Express with ACT! Premium for Web Server</u> or <u>Using Eudora with ACT! Premium for Web Server</u>.

With ACT! Premium for Web Server e-mail preferences, you select an e-mail system to use with ACT! Premium for Web Server, set up multiple e-mail systems if you work in the office or offsite, set composing options for e-mail messages and specify other options.

With ACT! Premium for Web Server e-mail, you can send e-mail messages to one or more contacts. You can attach files, contact, group, and company records, or activities you schedule to your messages. You can also use mail merge to send messages to several contacts, or to a single contact. You can manage the messages you send to and receive from contacts and record a history of the e-mail to your contact, group, and company records.

After you receive and read an e-mail message, you can attach the message to a contact, group, or company record, create a contact record from the sender, or create an activity from the message. Users with a Standard role and above can import, or merge, an attached contact, group, or company record from an e-mail message.

If you use Microsoft Outlook to send and receive e-mail messages, you can integrate your ACT! Premium for Web Server address book with Outlook to

send e-mail message to ACT! Premium for Web Server contacts. See <u>About Outlook address book integration</u> for more information.

You can also work with e-mail when you are offline.



A contact must have an e-mail address to send a message to. One way to check for contacts with no e-mail addresses is from the Lookup menu, use the E-mail Address command, and search on Empty field.

### How do I...?

Select a default e-mail system to use with ACT! Premium for Web Server

Set up e-mail preferences

Open and read e-mail

Write and and send an e-mail message

Reply to an e-mail message

# **Related Topics**

About the ACT! Premium for Web Server E-mail window
About the New Message window

# **Setting up Internet Mail**

If you specify Internet mail as one of your e-mail systems, you must define certain settings, which you can obtain from your Internet Service Provider (ISP) or system administrator.

### To set up Internet mail

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **E-mail System Setup**. The E-mail Setup Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.
- 4. Click Finish.

# **Setting up Microsoft Outlook**

You can set up Microsoft Outlook as one of the e-mail systems to use with ACT!, and then you can select Outlook as the default system. See <u>About Outlook address book integration</u> for additional integration features between ACT! and Outlook.

### To set up Microsoft Outlook

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **E-mail System Setup**. The E-mail Setup Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.
- 4. Click **Finish**.

## **Using Outlook Express with ACT!**

Outlook Express is compatible with ACT!, but some of ACT!'s e-mail features are limited or inactive when used with Outlook Express. Please consider the following limitations before choosing Outlook Express as your e-mail client.

- Outlook Express works only with a POP3 protocol, and will not work with IMAP or HTTP accounts, such as Hotmail.
- •You can only send plain-text messages from ACT! with Outlook Express.
- When you perform an e-mail merge, the recipients will receive the body of the message as plain text with the message itself as an HTML attachment.
- Only the Inbox folders of ACT! and Outlook Express contain e-mail messages from both systems. All other folders contain only the messages originating in their own respective systems.
- •You may receive a security warning each time you send e-mail from ACT!. You can disable this message by selecting Don't warn me anymore. For more information, see <u>Disabling the virus protection error message</u>.
- If you use Outlook Express to access your e-mail over the Internet, consider using ACT!'s Internet Mail.

#### To set up Outlook Express

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **E-mail System Setup**. The E-mail Setup Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.
- 4. Click Finish.

## **Using Eudora with ACT!**

Consider the following when using Eudora with ACT!:

- Eudora must be installed and working correctly.
- Some of ACT!'s e-mail features are limited when used with Eudora.
- If you are using Eudora to access Internet e-mail, you should consider using ACT!'s Internet Mail instead.
- **E**udora works only with POP3 protocol, not with HTTP accounts, such as Hotmail.
- •Messages can only be sent in plain text.
- For e-mail mail merges, the recipient will receive the body of the message in plain text format and the message itself as an HTML attachment.
- •You may receive a security warning each time you send e-mail from ACT!. You can disable this message by selecting "Don't warn me anymore."

#### To set up Eudora

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **E-mail System Setup**. The E-mail Setup Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.
- 4. Click Finish.

# Selecting your default e-mail system to use with ACT! Premium for Web Server

# To select your default e-mail system to use with ACT! Premium for Web Server

- 1. Install your e-mail software and verify that it works correctly.

  See <u>About ACT! Premium for Web Server e-mail</u> for the systems that you can use with ACT! Premium for Web Server.
- 2. From the ACT! Premium for Web Server **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
- 3. In the **E-mail system** box, in the **Send e-mail to contacts using** list, select the default e-mail system to use with ACT! Premium for Web Server, and then click **Apply**.

## Selecting the default text format for e-mail messages

You can select the default text format for e-mail messages or you can select the text format when writing a message.



Depending on the mail system that sends the messages, the Preferences setting might be overridden. For example, Outlook Express can only send plain text messages.

### To select the default text format for e-mail messages

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**. Press **F1** for field definitions.
- 3. In the **Composing Options** dialog box, in the **Send e-mails in** field, select **HTML** or **Plain Text**, and then click **OK**.

#### To select the text format when writing a message

- 1. Write or open an e-mail message, click the **Format** menu, and then select **HTML** or **Plain Text**.
- 2. If you changed from HTML to Plain Text, click **Yes** in the message box.

# Setting up a default history option for e-mail

### To set a default history option for e-mail

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**.
- 3. Under **History options**, select one of the options. Press **F1** for field definitions.
- 4. Click **OK**.

# **Setting up new e-mail notification**

### To set up new e-mail notification option

- 1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
- 2. Select the **When connected, notify me of new mail every \_\_\_\_minutes** option, and then select the number of minutes that should pass before ACT! checks for new messages.
- 3. Select the **Play sound when new e-mail arrives** option, and then select either **Beep** or **Wav file**. Click **Browse** to navigate to the location of the .wav file you want to play.
- 4. Click **Apply**, and then click **OK**.

# Setting the default option when attaching e-mail messages to contacts

The Attaching e-mails to contacts option lets you define how ACT! handles a file attached to a message when attaching the message to a contact record.

### To set the attaching e-mails to contacts option

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab.
- 3. In the **Attaching e-mails to contacts** box, select one of the options. Press **F1** for field definitions.
- 4. Click **Apply**, and then click **OK**.

# Setting the default auto-fill name option

You can set an option for ACT! to auto-fill the name when you write an e-mail message. If enabled, auto-fill will suggest names as you start to type the contact's name or e-mail address in the To, Cc, or Bcc fields.

### To set the auto-fill name option

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**.
- 3. In the **Auto-fill name** box, to enable auto-fill, select **Use auto-fill to suggest names by**.
- 4. From the list, select one of the fields for ACT! to find suggestions to complete recipient information. Press **F1** for field definitions.
- 5. To display the contact's full information in the To, Cc, or Bcc fields, select **Display full contact information**.
- 6. Click **OK**.

# Setting e-mail addressing and name resolution options

You can set the e-mail addressing and name resolution options to specify where you want ACT! to look to validate e-mail addresses and names when addressing an e-mail message.

### To set e-mail addressing and name resolution options

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**.
- 3. In the **E-mail addressing and name resolution** box, select one or both of the search in options. Press **F1** for field definitions.
- 4. If you selected both options, then in the **Search first in the** box, select the item that ACT! should search first.
- 5. Click **OK**.

# **Setting reply and forward options**

You can set the reply and forward options to specify if ACT! should close the message window, automatically include attachments, and include the e-mail body.

### To set reply and forward options

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**.
- 3. In the **Reply and forward settings** box, select one or more of the options. Press **F1** for field definitions.
- 4. Click **OK**.

# **Changing your default e-mail system**

### To change the default e-mail system

- 1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
- 2. In the **E-mail system** box, display the **Send e-mail to contacts using** list, and then specify the default system to use when sending e-mail. Press **F1** for more information.
- 3. Click **Apply**, and then click **OK**.



You can override this selection for an individual e-mail message.

# **Removing signatures**

### To remove a signature

- 1. From the **Tools** menu, click **Preferences**, and then click the **E-mail** tab.
- 2. Click **Composing Options**, and then click **Signatures**.
- 3. In the **Signature Names** box, select a name, click **Remove**, and then click **OK**.

#### **About the ACT! E-mail window**

You use the ACT! E-mail window to view messages in your Inbox and other folders, reply to or forward messages, find an e-mail message, and perform many other e-mail functions.

•To open the ACT! E-mail window, on the navigation bar, click E-mail. The ACT! E-mail window displays in a three-pane view: a Folder List, message list, and Preview Pane. You can resize the panes in the ACT! E-mail window.

**Tell me more about the Folder List** 

Tell me more about the message list

Tell me more about the Preview Pane

From the ACT! E-mail window's Actions menu, you can create a new message; create a new mail message from a template; attach a message to a contact, group, or company record; create a contact from a sender; and create an activity from a message.

### How do I...?

Work with e-mail messages
Work with attachments
Work with the Folder List
Work with the ACT! E-mail window

# **Related Topics**

About the New Message window

# Displaying or hiding the ACT! E-mail window toolbar

#### To display or hide the ACT! E-mail window toolbar

- 1. Open the **ACT! E-mail** window.
- From the View menu, click Toolbar.
   A check mark indicates that the toolbar is displayed.
- 3. To hide the toolbar, click to clear the check mark.

# **Displaying or hiding the Folder List**

#### To display or hide the Folder List

- 1. Open the **ACT! E-mail** window.
- 2. From the **View** menu, click **Folder List**. This displays the Folder List.
- 3. Clear the check mark to hide the Folder List.

# **Displaying or hiding the Preview Pane**

#### To display or hide the Preview Pane

- 1. Open the **ACT! E-mail** window.
- 2. On the toolbar, click the **Toggle Preview Pane** tool.

  The preview pane, located at the bottom of the ACT! E-mail window, displays or hides as you click the toggle tool.

# Displaying or hiding the status bar

#### To display or hide the the status bar

- 1. Open the **ACT! E-mail** window.
- From the View menu, click Status Bar.
   A check mark indicates that the status bar is displayed.
- 3. To hide the status bar, click to clear the check mark.

# Customizing the ACT! E-mail window message list columns

#### To customize the ACT! E-mail window message list columns

- 1. From the **ACT! E-mail** window, from the **View** menu, click **Columns**. The Columns dialog box opens.
- 2. Do the following:
- To display a column, click the check box, or click **Show**.
- To hide a column, clear the check box, or click **Hide**.
- To order the columns, select a column, and click Move Up or Move
   Down. This changes the order of the columns from left to right in the message list.
- To set the size of a column, select the column, and then in **The selected** column should be XX pixels wide, type a number.
- To reset to the default information, click **Reset**.
- 3. When you are done, click **OK**.

#### or

From the message list, you can click a column name, hold and drag the column to another location. You can click the separator between the column headings and when a double-sided arrow appears, drag the column to the size you want.

# **Resizing the ACT! E-mail window panes**

#### To resize the ACT! E-mail window panes

- 1. Open the **ACT! E-mail** window.
- 2. Point to the splitter bars.
- 3. When the pointer becomes a double-arrow, click and drag the Folder List bar to the right or left, or drag the Preview Pane bar up or down.

## **About the New Message window**

You use the New Message window to write an outgoing e-mail message. There are many ways to open the New Message window. Here are a few:

- Click the New button on the ACT! E-mail window toolbar
- Click E-mail Message from the Write menu
- Click an e-mail address for a contact
- Click the Write E-mail Message tool
- Use Mail Merge

From the New Message window, you can write and send a message, format the text, color and style of the new message, select recipients for the message, and insert a picture or hyperlink.

You can attach a contact, group, or company record, and a scheduled activity.

Also, you can check the spelling for a message, check the recipient names and addresses, request a return receipt, or specify whether to create a history item showing that the message was sent. You can send the message immediately or store it to send later.

### How do I...?

Work with e-mail messages
Work with attached records and activities
Format e-mail messages

# **Related Topics**

About your signature text
About the ACT! E-mail window

## Writing and sending e-mail messages

There are several ways to write an e-mail message. The following procedure is the quickest way to send an e-mail message to a single contact.

#### To write and send an e-mail message

1. From a **Contact Detail** window, click the contact's e-mail address. The New Message window appears with the contact's name in the To field.



If you have set up more than one e-mail account, you can change the account from which you are sending the e-mail by selecting the account in the From list.

- 2. In the **Subject** field, type a short description of the message.
- 3. (Optional) Select any of these options: **Priority**, **Create History**, or **Return receipt**. Press **F1** for field definitions.
- 4. In the text box, type your message.
- 5. (Optional) Insert a signature.
  - Before sending the message, you can check recipient names; format the text; check your spelling; attach contact, or group, or company records; attach files; insert graphics; or insert hyperlinks. The New Message window has menus and tools for these options.
- 6. Click **Send**.

## **Addressing e-mail messages**

You can address an e-mail message in several ways. You can select a recipient's name from an address book or click the e-mail address in the E-mail field of a contact record. You can also type the recipient's name or e-mail address into the To, Cc, or Bcc field when you create a new message.

If you type a contact or company name or e-mail address in the To, Cc, or Bcc fields, ACT! will try to match what you type with information in your database, depending on how you have set the auto-fill name option on the Composing Options dialog box.



If a contact has an e-mail address, you can also drag the contact from the Contact List and drop the contact into the To, Cc, or Bcc fields.

#### To address an e-mail message using the address book

- 1. Click the **Write E-mail message** tool. The New Message window opens.
- 2. Click the **To**, **Cc**, or **Bcc** buttons.
- 3. In the **Select Recipients** dialog box, from the **Address book** list, select the address book to search.
- 4. In the **Select from** list, choose one of the recipient options. These options will change depending upon the Address book you selected.
- 5. Select one or more names from the list on the left, and then click **To**, **Cc**, or **Bcc**. Press **F1** for field definitions.
- Quickly search for names in the list by typing the first few characters in the Type in/choose name field.
- 6. Continue selecting names from address books as needed, and then click **OK**.

#### To address an e-mail message by typing

- Begin typing the contact's first or last name, company name, or e-mail address, depending on how you have set the default auto-fill option.
   When you begin typing, ACT! completes the name or e-mail address and displays the first alphabetical record.
- 2. Press the **Down Arrow** to display more contacts, and then press **Enter**, or double-click on a contact to select it from the list.
  - If you specify to match by Company name, ACT! will match what you



type to the company names in contact records (not to company records).

## **Attaching contact records to e-mail messages**

If you are a Standard user or above, you can attach a contact record to an outgoing e-mail message.

#### To attach a contact record to an e-mail message

1. From the **New Message** window, write an e-mail message, and then click the **Attach Contact** tool.

The Attach Contact(s) dialog box appears. Press F1 for field definitions.

2. In the **Select contacts from** box, select an option.

If you select Selected Group or Selected Company, choose the group or company from the list.

3. To narrow the selection for All Contacts, in the **Type in/choose name** box, type the first three letters of the contact's last name.

The name appears highlighted in the list below.

4. From the list on the bottom left, select one or more contacts, and then click **Add**, or to attach all contact records, click **Add All**.

The selected contacts appear in the Attach These Contacts list. To remove a contact, select the contact in the Attach these contacts list, and then click Remove.

5. Click **OK**.

The attachment displays in the Attach list of the outgoing e-mail message.

6. Complete other options for the message, and then click **Send**.

# Attaching company or division records to e-mail messages

If you are a Standard user or above, you can attach a company or division record to an outgoing e-mail message.

#### To attach a company or division record to an e-mail message

- 1. From the **New Message** window, write a message, and then click the **Attach Company** tool.
  - The Attach Company dialog box appears. Press F1 for field definitions.
- 2. In the **Select companies from** box, select an option.
- 3. To narrow the selection, in the **Type in/choose name** box, type the first three letters of the company or division name.
  - The name appears highlighted in the list below.
- 4. From the list on the bottom left, select one or more companies or divisions and then click **Add**, or to attach all records, click **Add All**.
  - The selected company/division appears in the Attach These Companies/Divisions list. To remove a record, select it in the Attach these Companies/Divisions list, and then click Remove.
- 5. Click **OK**.
  - The attachment displays in the Attach list of the outgoing e-mail message.
- 6. Complete other options for the message, and then click **Send**.

# Attaching group or subgroup records to e-mail messages

If you are a Standard user or above, you can attach a group or subgroup record to an outgoing e-mail message.

#### To attach a group or subgroup record to an e-mail message

1. From the **New Message** window, write a message, and then click the **Attach Group** tool.

The Attach Groups(s) dialog box appears. Press F1 for field definitions.

- 2. In the **Select groups from** box, select an option.
- 3. To narrow the selection, in the **Type in/choose name** box, type the first three letters of the group or subgroup name.
  - The name appears highlighted in the list below.
- 4. From the list on the bottom left, select one or more groups or subgroups and then click **Add**, or to attach all records, click **Add All**.
  - The selected group/subgroup appears in the Attach these Groups/Subgroups list. To remove a record, select it in the Attach these Groups/Subgroups list, and then click Remove.
- 5. Click **OK**.
  - The attachment displays in the Attach list of the outgoing e-mail message.
- 6. Complete other options for the message, and then click **Send**.

## Attaching scheduled activities to e-mail messages

#### To attach a scheduled activity to an e-mail message

- 1. Select the activity in a calendar, the **Task List**, or the **Activities** tab.
- 2. Right-click on the activity, and then click **Send Activity** (Calendar) or **Send Activity E-mail** (Task List or Activities tab).
  - The New Message window opens. All participants, except users, are listed in the To field. The type of activity and the information from the activity's Regarding field displays as the subject of the message. The schedule information, including details, appears in the body of the message, and the activity is attached so that recipients can merge it into their calendars.
- 3. Make any changes and send the e-mail.

## **Checking names before sending e-mail messages**

When addressing an e-mail message, you can select a recipient's name from one of your address books, or you can type the recipient's name or e-mail address into the To, Cc, or Bcc fields. When you type an address or name and then TAB out of the field, ACT! Premium for Web Server automatically checks to ensure the name or address exists in your address books. You can also check names manually.

#### To manually check names

• After typing e-mail addresses or names into the To, Cc, or Bcc fields, click the **Check Names** tool on the toolbar.

E-mail addresses or names found in one of your address books will be underlined; those not found, are not underlined. When you send the message, you are prompted to add any e-mail addresses that were not found.

## **Checking spelling in e-mail messages**



A spelling check reviews only the body of the e-mail message. It does not verify spelling in the From, To, Cc, Bcc, and Subject boxes.

#### To check spelling in an e-mail message

1. To check only part of the message, select the text you want to check, and then from the **Spelling** menu, click **Check Selection**.

or

To check the entire message, from the **Spelling** menu, click **Check Document**.

- 2. If the Spell Check finds an unrecognized word, a replacement word appears in the **Replace with** field. You can do one of the following:
  - To replace the word with the one in the **Replace with** field, or with one of the suggested words, in **Suggestions**, select an alternate word, and then click **Replace**.
- To do nothing, click **Skip**.
- To add the unrecognized word to a dictionary, click **Add**.
- To cancel the spelling check, click **Cancel**.
- 3. Repeat step 2 until the Spelling Check Status message appears and indicates that the check is complete.



To automatically check spelling before sending an e-mail message, from the Tools menu, click Preferences, and then click the E-mail tab. Select the option Check spelling before sending e-mail.

## Changing the e-mail system when writing a message

If you have more than one e-mail system set up, you can change the default e-mail system when writing a new message.

#### To change the e-mail system when writing a message

- 1. Open the **New Message** window.
- 2. In the **From** field, the default e-mail system appears. Click the arrow to select another system.
- 3. Finish the message and send.

# **Displaying e-mail address properties**

#### To display e-mail address properties

• In an e-mail message, double-click on a name or an address in the **From**, **To**, **Cc**, or **Bcc** fields. Press **F1** for field definitions.



If you are displaying address properties for an individual not in your ACT! database, you can add the contact to your database by clicking the Add to Contacts button.

# Displaying or hiding the Blind Carbon Copy (Bcc) field

#### To display or hide the Bcc field

- 1. Write or open a new message.
- 2. From the **New Message** window, click the **View** menu, and then do one of the following:
  - To display the Bcc field, click **Bcc Field**. A check mark indicates the Bcc field is displayed in the message.
- To hide the Bcc field, click **Bcc Field** to clear the check mark.

# Saving e-mail messages to send later

### To save an e-mail message to send later

• Write an e-mail message, and then click the **Save** tool.

The message is stored in the appropriate e-mail account's Drafts folder. You can open, edit, and send it later.

## Using mail merge with e-mail

You can use mail merge to send an e-mail message to multiple contacts or to a single contact. Mail merge uses a document template. For more information about templates, see <u>Creating a document template</u>. There are several ways to access mail merge; the following procedures describe two of the ways.

#### To send an e-mail message to multiple contacts using mail merge

- 1. (Optional) Create a lookup of the contacts to whom you want to send the email message. For information on locating specific contacts, see <u>Looking up contacts</u>.
- 2. From the **Write** menu, click **Mail Merge**. The Mail Merge Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.

When you click Finish, the message is sent to the recipients.

#### To send an e-mail message to a single contact using mail merge

- 1. From the **ACT! E-mail** window, from the **Actions** menu, click **New Mail Message (from template)**.
  - The Mail Merge Wizard opens.
- 2. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for field definitions.
  - When you click Finish, the message is sent to the contact.

## Finding and replacing text in e-mail messages

#### To find and replace text in an e-mail message

- 1. From the **New Message** window, write a message.
- 2. From the **Edit** menu, click **Find and Replace**.

  The Find and Replace dialog box opens. Press F1 for more information.
- 3. In the **Find** field, type the text to be replaced.
- 4. In the **Replace with** field, type the replacement text.
- 5. Select other options.
- 6. Click Find Next.
- 7. To replace the first instance of the text, click **Replace**.

or

To replace all instances of the text, click **Replace All**.

8. Click Close.

## **About your signature text**

Your signature text usually appears at the end of an outgoing e-mail message. A signature text can include text, such as your name, company name or title, address, telephone number, your e-mail address, and other information. You can create custom signature texts to be used for different types of e-mail messages. When you write an e-mail message, you can automatically include your signature text when you set up the system to use with ACT; you can manually insert your signature text; or you can modify the emailbody.tpl template to include it.

# **Related Topics**

Creating or changing your signature text
Removing a signature
Inserting your signature text

## **About formatting an e-mail message**

You can send and receive an e-mail message in two formats: HTML or Plain text. You can change the look of an HTML message, but not a plain text message.

You can format text with numbering, bullets, alignment, and different font types, styles, and colors. You can also insert pictures, files, hyperlinks, and your signature text to an e-mail message.

#### How do I...?

Select the text format for e-mail messages

Change font attributes

Format e-mail text

Format e-mail text using styles

Add bulleted or numbered lists

<u>Insert pictures</u>

<u>Insert hyperlinks</u>

<u>Insert my signature text</u>

# Adding bulleted or numbered lists in an e-mail message



The formatting options listed work only for HTML text..

#### To add a bulleted list

• Create or open an e-mail message, click the **Bullets** tool, and then begin typing.

or

Select the text you want to place in a bulleted list, and then click the **Bullets** tool.

#### To add a numbered list

• Create or open an e-mail message, click the **Numbers** tool, and then begin typing.

or

Select the text you want to place in a numbered list, and then click the **Numbers** tool.

## Inserting or deleting pictures in an e-mail message

If you <u>select HTML</u> text formatting, you can insert pictures into your e-mail messages.

#### To insert pictures

- 1. From the **New Message** window, write a message, click the **Insert** menu, and then click **Picture**.
- 2. In the **Picture** dialog box, type a file path in the **Picture Source** field or click **Browse** to locate a picture.
- 3. (Optional) In the **Alternate Text** field, type text that displays when the image is loading or that appears in place of an image when the image is unavailable on the recipient's computer.
- 4. (Optional) Select one or more layout or spacing options. For field definition and use, click in the field and then press **F1**.

#### To delete a picture

• Click on the picture, and then press **DELETE**.

# Inserting a hyperlink into an e-mail message

#### To insert a hyperlink into an e-mail message

- 1. From the **New Message** window, write an e-mail message, and then click the **Hyperlink** tool.
- 2. In the **Hyperlink** dialog box, select a hyperlink type from the **Type** list, type the **URL**, and then click **OK**.

## Changing font attributes in an e-mail message

If you select HTML text formatting, you can change the font attributes for text.

#### To change font attributes

- 1. Click the **Font** tool on the toolbar.
- 2. In the **Font** dialog box, change any of the following: **Font**, **Style**, **Size**, **Effects**, or **Color**.

The changes apply to text typed from the insertion point forward. You can also select existing text and change font attributes.

# **Formatting text using styles**



The formatting options work for HTML text only.

Styles apply formatting to paragraphs. You can apply formatting to specific words or sentences using toolbar tools.

#### To format text using styles

- 1. Place the cursor in the paragraph you want to format, click the **Format** menu, and then point to **Style**.
- 2. From the **Style** list, select a style.

### Formatting e-mail text



The formatting options work for HTML text only.

#### To bold, underline, or italicize text

- 1. Select the text to format.
- 2. On the toolbar, click the **Bold**, **Underline**, or **Italicize** tool, as applicable.

#### To align text

- 1. Place the cursor in the paragraph you wish to align.
- 2. On the toolbar click the **Align Left**, **Center**, or **Align Right** tool.

#### To increase or decrease the paragraph indent

• Place the cursor in the paragraph where you want to change the indent, and then click the **Increase Indent** or **Decrease Indent** tool.

# Changing text and background colors in e-mail messages

If you <u>select HTML</u> text formatting, you can change your text colors or change the background color on which the text is written.

#### To change the text color

- 1. Click the **Font** tool on the toolbar.
- 2. Select a color from the **Color** list.

or

Click the **Color** button to the right of the **Color** list, and then select a color from the palette, or click **Define Custom Colors** to create a custom color.

The changes apply to text typed from the insertion point forward. You can also select existing text and change font attributes.

#### To change the background color

- 1. From the **Format** menu, click **Back Color**.
- 2. Select a color from the palette or click **Define Custom Colors** to create a custom background color.

You can change the font color to make it easier to view on the new background color.

### **Inserting your signature text**

Your signature text is automatically inserted in an e-mail message if you assigned one when you set up the e-mail system. You can manually insert any signature text you have defined.

#### To insert your signature text in an e-mail message

- 1. Write a message.
- 2. From the **New Message** window, click the **Insert Signature** tool.
- 3. Select the signature you want to include, and then click **OK**.



To include your signature text when using the Mail Merge Wizard, add it to the e-mail template (EMAILBODY.TPL). See <u>Editing a document template</u>.

### **Creating or changing your signature text**

Your signature text usually appears at the end of an outgoing e-mail message.

#### To create or change your signature text

- 1. From the **Tools** menu, click **Preferences**.
- 2. Click the **E-mail** tab, and then click **Composing Options**. The Composing Options dialog box opens.
- 3. Click **Signatures**, and then in the **E-mail Signatures** dialog box, do one of the following:
- To create a new signature, click **Add**, type the signature name, and then press **ENTER**.
- To change signature text, select a signature name in the Signature Names box, then in the Edit Signatures box, type the signature text, and click OK.

Press F1 for field definitions.

### **Attaching files to e-mail messages**

#### To attach a file to an e-mail message

- 1. From the **New Message** window, write an e-mail message, and then click the **Attach File** tool.
- 2. In the **Insert File Attachment** dialog box, locate and select the file(s) that you want to attach, and then click **Open**.
  - The attachment displays in the Attach list of the outgoing e-mail message.
- 3. Complete other options for the message, and then click **Send**.

### Attaching e-mail messages to contact records

You can attach an e-mail message to a contact record so that you have a history of the message. This will make a copy of the message; it does not move the message from e-mail.

#### To attach a message to a contact record

- 1. From the **ACT! E-mail** window, select the message.
- 2. From the **Actions** menu, point to **Attach**, and then click **Attach To Contact**.

The Attach E-mail to Contact(s) dialog box appears. Press F1 for field definitions.

- 3. In the **Select contacts from** box, select an option.
  - If you select Selected Group or Selected Company, choose the group or company from the list.
- 4. To narrow the selection for All Contacts, in the **Type in/choose name** box, type the first three letters of the contact's last name.
  - The name appears highlighted in the list below.
- 5. From the list on the bottom left, select one or more contacts, and then click Add, or to attach the message to all contact records, click Add All.
  The selected contacts appear in the Attach these Contacts list. To remove a contact, select the contact in the Attach these contacts list, and then click
- 6. Click **OK**.

Remove.

The details of the e-mail message display on the History tab(s) for the selected contact(s).

### **Attaching e-mail messages to group records**

You can attach an e-mail message to a group record so that you have a history of message. This will make a copy of the message; it does not move the message from e-mail.

#### To attach a message to a group record

- 1. From the **ACT! E-mail** window, select the message.
- 2. From the **Actions** menu, point to **Attach**, and then click **Attach To Group**. The Attach E-mail to Groups(s) dialog box appears. Press F1 for field definitions.
- 3. In the **Select groups from** box, select an option.
- 4. To narrow the selection, in the **Type in/choose name** box, type the first three letters of the group or subgroup name.

  The name appears highlighted in the list below.
- 5. From the list on the bottom left, select one or more groups or subgroups and then click **Add**, or to attach the message to all records, click **Add All**.

  The selected group/subgroup appears in the Attach these Groups/Subgroups list. To remove a group, select it in the Attach these Groups/Subgroups list, and then click Remove.
- 6. Click **OK**.

The details of the e-mail message display on the History tab(s) for the selected group(s).

### **Attaching e-mail messages to company records**

You can attach an e-mail message to a company record so that you have a history of message. This will make a copy of the message; it does not move the message from e-mail.

#### To attach a message to a company record

- 1. From the **ACT! E-mail** window, select the message.
- 2. From the **Actions** menu, point to **Attach**, and then click **Attach To Company**.

The Attach E-mail to Companies dialog box appears. Press F1 for field definitions.

- 3. In the **Select companies from** box, select an option.
- 4. To narrow the selection, in the **Type in/choose name** box, type the first three letters of the company or division name.
  - The name appears highlighted in the list below.
- 5. From the list on the bottom left, select one or more companies or divisions and then click **Add**, or to attach all records, click **Add All**.
  - The selected company/division appears in the Attach these Companies/Divisions list. To remove a record, select it in the Attach these Companies/Divisions list, and then click Remove.
- 6. Click **OK**.

The details of the e-mail message display on the History tab(s) for the selected company(ies).

### **Opening e-mail attachments**

You can open an e-mail attachment. If the attachment is a file or document, you must have access to the application the file or document was created in.

If the attachment is a contact, group, or company record, or an activity, you can merge the record or activity into your ACT! database.

#### To open an e-mail attachment

- 1. Open the message containing the attachment.
- 2. In the **Attach** list, double-click the file.

The attachment opens. You can print or save the attachment.

### **Saving e-mail attachments**

You can save e-mail attachments to a folder on your computer. When you receive contact records, group records, or activities as attachments, you can save the attachments.

#### To save an attachment

- 1. In the **ACT! E-mail** window, open the message containing the attachment.
- 2. From the **File** menu, click **Save Attachments**.
- 3. In the **Save Attachment(s)** dialog box, select the attachment(s) to save. For field definitions, press **F1**.
- 4. (Optional) You can select a different folder in which to save the attachment(s) by clicking **Browse** and then select the folder.
- 5. Click Save.

# Removing attachments from e-mail messages

### To remove an attachment from an e-mail message

• Open the message containing the attachment, select the item in the **Attach** list, and then press **DELETE**.

# **Checking for new e-mail messages**

#### To check for new messages

• From the **ACT! E-mail** window, click the **Send/Receive** tool.



You can have ACT! Premium for Web Server notify you when new email arrives. See <u>Setting up new e-mail notification</u>.

### Opening and reading e-mail

#### To open and read e-mail

- 1. On the navigation bar, click **E-mail**.
  - The ACT! E-mail window opens. Messages display in the message list, in order from newest to oldest. You can change the sort order by clicking a column header.
- 2. (Optional) To read messages in another folder, click the folder in the **Folder List**.
- 3. In the message list, select a message to view it in the Preview Pane or double-click the message to open it.



For some Microsoft Outlook items, you can open and read them only in Outlook.



If you cannot connect to your e-mail account, you can still read, write, and reply to e-mail messages, <u>save them in your Drafts folder</u>, and then send them later when you log on. For more information, see <u>Working</u> with e-mail offline.

# Marking messages as read or unread

#### To mark a message as read

- 1. From the **ACT! E-mail** window, select an e-mail message in the list.
- 2. From the **Edit** menu, click **Mark as Read**.



If the Preview Pane is open and you set the time for the Mark e-mail as read in preview pane preference on the E-mail tab, the unread message will be marked as Read after the time duration passes.

#### To mark a message as unread

- 1. From the **ACT! E-mail** window, select an e-mail message in the list.
- 2. From the **Edit** menu, click **Mark as Unread**.

# **Replying to e-mail messages**

#### To reply to an e-mail message

- 1. In the **ACT! E-mail** window, open the message you want to reply to or select the message in the Inbox.
- 2. Click the **Reply** or **Reply to All** tool.
- 3. Type your reply in the text box, and then click **Send**, or <u>save your message</u> to send later.

### **Sorting e-mail messages**

You can sort the e-mail messages for each folder in the ACT! E-mail window.

#### To sort e-mail messages

- 1. From the **ACT! E-mail** window, in the **Folder List**, select a folder. All the messages for that folder appear in the message list.
- 2. To sort the messages in the message list, do one of the following:
- Right-click a column heading, then select **Sort Ascending** or **Sort Descending**.
- Click the column heading and the up or down arrow appears to show the sort order.

### **Forwarding e-mail messages**

#### To forward an e-mail message

- 1. In the **ACT! E-mail** window, open the message you want to forward or select the message in the **Inbox**.
- 2. Click the **Forward** tool.
- 3. In the **To**, **Cc**, and/or **Bcc** fields, type one or more e-mail addresses, or contact, company or group names, separating multiple names or addresses in one field by a semicolon.

or

- Click the **To**, **Cc**, or **Bcc** buttons to open the **Select Recipients** dialog box and select contact, company or group names from one or more address books. Press **F1** for field definitions. See <u>Addressing an e-mail message</u>.
- 4. (Optional) In the text box, type any information that you want to precede the message you are forwarding.
- 5. Click **Send**, or <u>save your message to send later</u>.

### Finding e-mail messages

Using the Find Message dialog box, you can search for messages that you received from or sent to recipients. You can also search based on words found in the subject or that appear in the body of the message. You can refine your search by date range and include only messages with attachments.

#### To find an e-mail message

- 1. In the **ACT! E-mail** window, in the **Folder List**, right-click the folder to search, and then click **Find Message**.
  - The Find Message dialog box appears.
- 2. Select your search criteria, and then click **Find Now**. For more help, press **F1**.
  - The search results appear in the bottom pane of the Find Message dialog box. Double-click an e-mail message to open it.
- 3. To search for messages in a different folder, click **Browse**, and then select the folder.

# Dragging and dropping e-mail messages to contact records

You can drag and drop an e-mail message to a contact record. If you receive the message from a contact that is already in your ACT! Premium for Web Server database, you can attach the message to the History tab. If you receive a message from someone not in your ACT! Premium for Web Server database, you can attach the message to the current contact, or you can create a contact record from the e-mail message.

#### To drag and drop an e-mail message to a contact record

- 1. Display any contact record.
- 2. From the **ACT! Premium for Web Server E-mail** window, select the message.
- 3. Hold the mouse button, and then drag the message to the contact record.
- 4. If the contact's e-mail address is found in your database, the details of the message display on the contact's History tab.

or

If the contact's e-mail address is not found, the **No Contact Found** dialog box appears. Select one of the options, and then click **OK**. Press **F1** for more information.

### **Creating contact records from e-mail messages**

If you receive an e-mail message from someone who is not a contact is your database, you can easily create a contact record for the sender.

#### To create a contact record from an e-mail message

- 1. From the **ACT! E-mail** window, select the e-mail message from the sender you want to create a contact record for.
- 2. From the **Actions** menu, click **Create Contact From Sender**.
- 3. In the **New Contact** dialog box, enter the contact's information in the empty fields, and then click **OK**. Press **F1** for field definitions.

### **Creating activities from e-mail messages**

If you receive an e-mail reminder for an activity, you can merge the activity into your ACT! database so the activity appears on your calendar.

#### To create an activity from an e-mail message

- 1. From the **ACT! E-mail** window, select the e-mail message from the contact for which you want to create an activity.
- 2. From the **Actions** menu, click **Create Activity from Message**. The Schedule Activity dialog box appears.
- 3. Complete the details for <u>scheduling the activity</u>. Press **F1** for more information.

### Saving e-mail messages to a file

#### To save an e-mail message to a file

- 1. In the **ACT! E-mail** window, open the message or select the message(s) from the message list.
- 2. From the **File** menu, select **Save As**.
- 3. In the **Save As** dialog box, select a location for the file, enter a **File name**, and then click **Save**.

The Save As dialog box appears for each message you selected.



By default, the message saves as an IMA file (ACT! format). You can save as a text (.txt) file.

# **Opening hyperlinks in e-mail messages**

#### To open a hyperlink in an e-mail message

- 1. In the **ACT! E-mail** window, open the message containing the hyperlink.
- 2. Click the hyperlink.



If the hyperlink does not open, check to see if you are connected to the Internet.

## **Printing e-mail messages**

#### To print a message

• From the **E-mail** window, select a message in the message list, and then click the **Print** tool, and then in the **Print** dialog box, click **OK**.

or

Open the message, and then click the **Print** tool, and in the **Print** dialog box, click **OK**.

### **Creating and deleting e-mail folders**

You can create folders in ACT! e-mail for any system you have set up to use with ACT!. If you use Outlook or Internet Mail, you can manage your folders within ACT! (such as renaming and moving folders) and the other system as well. For Outlook Express and Eudora, you can create the folders in ACT!, but they cannot be managed in the other system.

You can delete folders in ACT!. We recommend that you do not delete the default folders that ACT! creates when you set up an e-mail system to use with ACT!.

#### To create e-mail folders

- 1. In the ACT! E-mail window, click in Folder List.
- 2. On the toolbar, click the **New** tool, and then click **Folder**.
- 3. In the **Create Folder** dialog box, type the **Folder name** in the field.
- 4. From the list box, select the folder in which to create the new folder, and then click **OK**.

#### To delete a folder and its contents

• From the **ACT! E-mail** window, select the folder in the **Folder List**, and then click the **Delete** tool.

# **Displaying folder contents**

### To display items in a folder

• From the **ACT! E-mail** window, click a folder in the **Folder List**. Items appear in the message list.

# **Sending saved e-mail messages**

#### To send a saved e-mail message

1. From the **ACT! E-mail** window, click the **Drafts** folder in the **Folder List**.



If you have multiple e-mail systems set up to use with ACT!, select the appropriate system's Drafts folder.

2. Open the message, make any changes, and then click the **Send** button.

# **Moving e-mail folders**

#### To move a folder

- 1. From the **ACT! E-mail** window, select the folder in the **Folder List**.
- 2. On the toolbar, click **Move to Folder** tool.
- 3. In the **Move Items** dialog box, click the folder you want to move the selected folder to, and then click **OK**.

or

From the **Folder List**, drag a folder into another folder.

### **Renaming e-mail folders**

You can rename e-mail folders that you created. We recommend that you do not rename the five default folders (Deleted Items, Drafts, Inbox, Outbox, and Sent Items) that ACT! Premium for Web Server creates for each e-mail system you have set up.

#### To rename an e-mail folder

- 1. From the **ACT! E-mail** window, right-click a folder in the **Folder List**, and then click **Rename**.
  - The folder name becomes a field in which you can type.
- 2. Type the name of the folder in the field, and then press **ENTER**.

### Copying or moving e-mail messages to folders

#### To copy an e-mail message to a folder

- 1. From the **ACT! E-mail** window, select a message in the message list.
- 2. From the **Edit** menu, click **Copy to Folder**.
- 3. In the **Copy Items** dialog box, click the folder where you want to copy the message to, and then click **OK**.

#### To move an e-mail message to a folder

- 1. From the **ACT! E-mail** window, select a message in the message list, and then do one of the following:
- Click the **Move to Folder** tool. In the **Move Items** dialog box, click the folder where you want to move the message to, and then click **OK**.
- Drag the message to a folder in the **Folder List**.



If you drag a message from one e-mail system into another, as an example, from Microsoft Outlook into Eudora, the message will be copied, not moved.

### **Emptying the Deleted Items folder**

#### To empty the Deleted Items folder

- 1. From the **ACT! E-mail** window, in the **Folder List**, select the **Deleted Items** folder .
- 2. From the **Edit** menu, click **Empty 'Deleted Items' Folder**.



You can set an option on the E-mail tab of the Preferences dialog box to automatically empty the Deleted Items folder when you exit e-mail.

# **Deleting e-mail messages**

#### To delete an e-mail message

- 1. From the **ACT! E-mail** window, open the folder containing the message(s) to delete, and then select the message(s).
- 2. Click the **Delete** tool.

The message(s) are moved to the Deleted Items folder in the Folder List. You can also <u>delete messages from the Deleted Items folder</u>.

### Viewing sent or deleted messages

#### To view e-mail that you have sent

- 1. From the **ACT! E-mail** window, click the **Sent Items** folder. Messages that you have sent appear in the message list.
- 2. Select a message to view.

#### To view e-mail that you have deleted

- 1. From the **ACT! E-mail** window, click the **Deleted Items** folder. Messages that you have deleted appear in the message list.
- 2. Select a message to view.

### **About Microsoft Outlook address book integration**

If you use Microsoft Outlook to send and receive e-mail messages, you can add one or more ACT! address books to Outlook. Then, you can select ACT! Premium for Web Server contacts to send e-mail messages to, record those messages to the contact's history, or attach received Outlook e-mail messages to a contact's record. Your computer must have access to an ACT! database in order to use ACT! address books when you open Outlook.

You can set up a default history option for how Outlook e-mail messages appear in a contact's History tab. From the options, you can choose to save only the date, time and subject line of an e-mail message, save the date, time, subject and message text, save the entire e-mail as an attachment, or do not save e-mail to history.

### How do I...?

Add ACT! address books to Outlook

Set ACT! history options in Outlook

Send e-mail to ACT! Premium for Web Server contacts using Outlook

Attach Outlook e-mail to contact records

# **Related Topics**

<u>Troubleshooting - Verifying ACT! 7 add-in for Outlook integration</u>

## Adding ACT! address books to Outlook

The procedures for adding address books in Outlook 2000 and 2002/2003 differ slightly. Please follow the procedure for the version of Outlook that is currently installed on your system.

To add ACT! address books to Outlook 2000

To add ACT! address books to Outlook 2002/2003

## **Setting ACT! history options in Outlook**



If Microsoft Word is your default Outlook e-mail editor, you cannot record history in ACT!.

### To set ACT! contact history options for Outlook e-mail

- 1. Open Microsoft Outlook, and from the **Tools** menu, click **Options**.
- 2. In the **Options** dialog box, click the **ACT!** tab.
- 3. Select one of the following options for ACT! to record e-mail in a contact's history:
- **Date, time, and subject** ACT! records only the date, time, and subject on the History tab. The body of the message does not display in ACT!.
- **Date, time, subject, and message text** ACT! saves the date, time, subject, and content on the History tab. This option can take up space in the contact window.
- **Entire e-mail as an attachment** ACT! includes the entire e-mail as an attachment to the History tab.
- **Do not save e-mail to history** ACT! does not record the e-mail on the History tab.
- 4. Click **OK**.

# Sending e-mail messages to ACT! contacts using Outlook



To use this feature, you must have <u>added an ACT! address book to</u> Outlook.

### To send an e-mail message to an ACT! contact using Outlook

- 1. Open Microsoft Outlook, and then click New.
- 2. In the **Untitled Message** window, click the **To** button.
- 3. In the **Select Names** dialog box, do the following:
- a. In the **Show Names from the** list, select the ACT! Address Book that contains the contact.
- b. In the **Name** list, select one or more contacts from the list, and click **To**, **Cc**, or **Bcc**, and then click **OK**.
- 4. Compose and send the message.

For information about using Outlook e-mail, see Outlook's online Help.

## Attaching Outlook e-mail messages to ACT! contact records

Once you have added an ACT! address book to Outlook, you can attach an Outlook e-mail message to an ACT! contact record.

### To attach an Outlook e-mail message to an ACT! contact record

- 1. In Outlook, open your **Inbox**, and then select the message you want to attach, or double-click a message to open.
- 2. On the toolbar, click the **Attach to ACT! Contact(s)** button, and if you have added more than one ACT! address book to Outlook, you must select the database in which the contact is stored.
- 3. In the **Attach Contact(s)** dialog box, in the **Select contacts from** section, choose one of the options.
- 4. From the **Contact** list, select the contact or contacts, and click the **Add** button, and then click **OK**.
  - A link to the e-mail message appears on the contact's History tab and the message itself is saved to the database's supplemental file system.

# Troubleshooting - Verifying ACT! 7 add-in for Outlook integration

If you are experiencing problems with ACT! Outlook integration, you can verify that the ACT! add-in has been installed in Outlook.

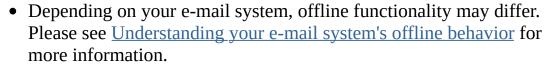
### To verify ACT! add-in for Outlook integration

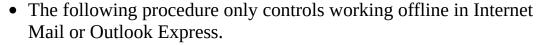
- 1. Open Outlook, and from the **Tools** menu, click **Options**.
- 2. Click the **Other** tab, and in the **General** area, click **Advanced Options**.
- 3. In the **Advanced Options** dialog box, click the **Add-In Manager** button. You should see ACT! 7 Extensions in the list and it should be selected.
- 4. Click **OK** to close all the dialog boxes.

## **Working with e-mail offline**

You can work with your e-mail messages in offline mode or while your computer is disconnected from a network or the Internet. You may do this, for example, if you are working from a remote location. You can create and reply to messages, and then send them when you are connected to the network or the Internet.

To work with ACT! e-mail offline, your e-mail system must support working offline. Please refer to your e-mail system's Help for information.





### To work offline

From the ACT! E-mail window, click File, and then click Work Offline.
 Messages you send are stored in the Outbox until you switch to working online.



## Understanding your e-mail system's offline behavior

Depending on the e-mail system(s) you use, how e-mail works in the offline mode differs. The following sections explain the typical behavior of working in offline mode for each system ACT! supports.

### **Microsoft Outlook and Eudora**

- Online and offline settings are controlled by these e-mail systems, not by ACT!.
- Messages you create and send remain in your Outbox until you are connected to that e-mail system's mail server.

### **Outlook Express or Internet Mail**



When you use these e-mail systems, we recommend that you switch to offline mode when not connected to the Internet.

- •These e-mail systems use the same connection settings for Internet Explorer that are set in the Internet Options Control Panel.
- ACT!'s online and offline settings share these e-mail systems' settings. For example, if Internet Explorer or Outlook Express is set to work offline, ACT!'s e-mail is also set to work offline.
- Messages you create and send remain in your Outbox until you are connected to the Internet.

## **About reports**

Reports enable you to view specific information about your contacts, calendar, opportunities, products, groups, and companies. You can run a report using an existing report template, you can create your own report template, or you can create a new report based on a report template. Once you run a report, you can preview, print, fax, or e-mail it, or you can save it as an HTML, PDF, RTF, or text file. If you have a report from a previous version of ACT!, you can convert it for use with the current version.

## How Do I...?

Run a report

## **Related Topics**

About report templates and the Report Designer

## **Running reports**

When you run a report, you can specify the information that appears on the report by selecting the type of report you want to run and then selecting the filter options for it. You can set filters each time that you run a report, or you can save filter settings with a report template so that the filters are applied each time you run the report. For more information, see <u>Filtering data in report templates</u>.

### To run a report

- 1. Perform a lookup of contact records or display a single contact record that you want to include in the report.
- 2. (Optional) If you want contacts in the report to appear in a particular order, such as alphabetically, <u>sort</u> the contacts before running the report.
- 3. From the **Reports** menu, run a contact report by clicking the report title that you want to run.

#### or

From the **Reports** menu, run a group, company, or opportunity report by pointing to **Group Reports**, **Company Reports**, or **Opportunity Reports**, and then clicking the report title.

The Define Filters dialog box appears. The tabs that appear on the Define Filters dialog box vary depending on the type of report you are running. For field definitions, press F1.

- 4. Complete the fields in the **General** tab.
- 5. Complete the fields in the **Activity** tab.
- 6. Complete the fields in the **Note** tab.
- 7. Complete the fields in the **History** tab.
- 8. Complete the fields in the **Opportunity** tab.
- 9. Click **OK**.

### To run a report not listed on the Reports menu

- •To run a contact report, from the **Reports** menu, click **Other Contact Reports**.
- •To run a group report, from the **Reports** menu, point to **Group Reports**, and then click **Other Group Reports**.
- •To run a company report, from the **Reports** menu, point to **Company Reports**, and then click **Other Company Reports**.

•To run an opportunity report, from the **Reports** menu, point to **Opportunity Reports**, and then click **Other Opportunity Reports**.

## **Printing reports**

You can print a report from the Print dialog box, you can send the report directly to the printer when you run a report, or you can print a report from the program associated with the output option you selected when running a report. For information about running a report, see <a href="Running a report">Running a report</a>. For information about printing from the output option you selected when running a report, see the help for the program associated with the output option.

### To print a report from the Print dialog box

- From the **File** menu, click **Print**.
   The Print dialog box appears. For field definitions, press F1.
- 2. From the **Printout Type** list, select **Reports**.
- 3. From the **Paper Type** list, select the type of report you want to print.
- 4. Click **Print**.

  The Define Filters dialog box appears. For field definitions, press F1.
- 5. Select the options you want to use to filter information on the report, and then click **OK**. For more information about defining filters on a report, see <u>Running a report</u>.
- 6. On the **Print Preview** window, click **Print**, and then click **OK**.



You can also edit the template before printing the report. To edit a report template, click the Edit Template button. For more information about modifying report templates, see <u>Modifying a report template</u>.

## **Summary of ACT! Premium for Web Server reports**

ACT! Premium for Web Server includes a number of reports for viewing and printing information about your contacts, groups, companies, and opportunities. Most reports appear in the Reports menu.

Contact reports	Report file name (template)	Information included in report
Contact Report	Contact Report.rep	All contact information including notes, history, and activities for each contact.
Contact Directory	Contact Directory.rep	Primary address and home address for each contact.
Phone List	Phone List.rep	Company name, company phone number, phone extension, and mobile phone number for each contact.
Activities	Activities.rep	Information about the activities scheduled with each contact during a specified date range.
Notes/Histories	Notes-Histories.rep	Notes and history items for each contact during a specified date range.
History Summary	History Summary.rep	List of tasks completed by each contact during a specified date range, including: calls made, meetings held, and opened opportunities.

History Summary Classic	History Summary Classic.rep	Total number of attempted calls, completed calls, meetings held, and letters sent for each contact during a specified date range.
History Time Spent	History - Time Spent.rep	Total time spent completing activities.
Contact Status	Contact Status.rep	Information about the contact status, including the last reach, last email, and the last time the contact record was edited.
Source of Referrals	Source of Referrals.rep	Referred By information for each contact.
*E-mail List	Email List.rep	Lists contact names and their primary e-mail addresses.
*Task List	Task List.rep	Information about the activities scheduled with each contact and the status of each activity during a specified date range.
Group reports	Report file name (template)	Information included in report
Group Membership	Group Membership.rep	List of all groups and their members.
Group Summary	Group Summary.rep	Notes, histories, activities, and opportunities for all groups.

Group Comprehensive	Group Comprehensive.rep	All information (including notes, histories, activities, and opportunities) for each group and subgroup.
Group List	Group List.rep	List of all groups.
Company reports	Report file name (template)	Information included in report
Company Membership	Company Membership.rep	List of all companies and their members.
Company Summary	Company Summary.rep	Notes, histories, activities, and opportunities for all companies.
Company Comprehensive	Company Comprehensive.rep	All information (including notes, histories, activities, and opportunities) for each company.
Company List	Company List.rep	List of all companies.
Company Directory	Company Directory.rep	List of company addresses and phone numbers.
Opportunity reports	Report file name (template)	Information included in report
Totals By Status	Opportunities by Status.rep	Opportunity totals.
Adjusted for Probability	Opportunities Adjusted for Probability.rep	All opportunities by contact, with totals.
*Lost Opportunities by Competitor	Lost Opportunities by Competitor.rep	Lost opportunities listed by competitor.

*Lost Opportunities by Reason	Lost Opportunities by Reason.rep	Lost opportunities listed by reason.
*Lost Opportunities by Record Manager	Lost Opportunities by Record Manager.rep	Lost opportunities listed by record manager.
Pipeline Report	Pipeline report.rep	All open opportunities by contact and stage.
Opportunities By Record Manager	Opportunities by Record Manager.rep	Open opportunities by Record Manager.
*Opportunities by Company	Opportunities by Company.rep	Summary information for each company and any open opportunities.
Opportunities by Contact	Opportunities by Contact.rep	Summary information for each contact and any open opportunities.
*Opportunities by Group	Opportunities by Group.rep	Summary information for each group and any open opportunities.
Opportunity Graph	Not applicable	Forecasted or closed opportunities, in a bar or line graph. For more information, see <a href="Creating an opportunity graph">Creating an opportunity graph</a> .
Opportunity Pipeline	Not applicable	The number of opportunities at each stage of the sales process, in a graphical form. For more information, see <a href="Creating an opportunity pipeline">Creating an opportunity pipeline</a> .
*Opportunities Referred By	Opportunities Referred By.rep	Opportunities listed by who referred the opportunity. Closed/Won opportunities listed by

\*Sales by Reason

Sales by Reason.rep reason.

\* Indicates reports you can access from Other Contact Reports, Other Group Reports, Other Company Reports, and Other Opportunity Reports.

## **About report templates and the Report Designer**

ACT! Premium for Web Server includes report templates that you can run, modify, or use as a basis for creating your own templates. Report templates can display contact, group, company, or opportunity information and calculated values such as totals and averages of numeric data.

A report template includes fields that appear in a report, such as your contact's name, sales information, and future activities. It also includes the ability to draw and use pictures in the report. Report templates are divided into sections that organize your information, such as the Report Header, Page Header, Detail, Page Footer, and Report Footer. Using the Report Designer, you can change the appearance of a report template by adding or modifying fields, objects, or sections, so that they display the information you want in a report. You can print or run a template to create a report containing information you select. Report templates can also be saved to Rich Text Format, plain text, HTML, PDF, or sent to others through e-mail. For information about running a report, see About reports.

You can make changes to objects on a report through the toolbar, dialog boxes, and the Properties window. For information about making changes to objects through dialog boxes, press F1 on the dialog box. For information about making changes to objects through the Properties window, see <u>Using the Properties</u> <u>Window</u>.

## How do I...?

Use the Report Designer
Work with sections and subreports
Work with fields in a template
Work with colors and images

## **Related topics**

About reports

## **Opening the Report Designer**

## To open the Report Designer

From the **Reports** menu, click **New Template** or **Edit Template** to open a template in the Report Designer.

# Opening and closing the Properties Window in report templates or layouts

### To open the Properties Window in a report template or layout

- 1. Open the <u>Layout</u> or <u>Report Designer</u>.
- 2. From the **View** menu, click **Properties Window**, or press **F4**.

### To close the Properties Window in a report template or layout

• From the **View** menu in the **Layout** or **Report Designer**, click **Properties Window** again, or press **F4**.

# **Showing and hiding the Toolbox in report templates or layouts**

### To show or hide the Toolbox in a report template or layout

- 1. Open the <u>Layout</u> or <u>Report Designer</u>.
- 2. From the **View** menu, click **Toolbox**.

  The Toolbox closes. Click Toolbox again from the View menu to open it.

# Moving or resizing the Properties Window in report templates or layouts

### To move the Properties Window in a report template or layout

- 1. Open the <u>Layout</u> or <u>Report Designer</u>.
- 2. In the **Properties** title bar, click the left mouse button and drag the window to another location.

### To resize the Properties Window in a report template or layout

- 1. Open the <u>Layout</u> or <u>Report Designer</u>.
- 2. Position the pointer over any side of the **Properties Window**.
- 3. When the pointer changes to a double-sided arrow, click and hold the left mouse button, and then drag the arrow.

# Moving or resizing the Toolbox in report templates or layouts

### To move the Toolbox in a report template or layout

- 1. Open a <u>report template</u> or <u>layout</u>.
- 2. In the **Toolbox** title bar, click the left mouse button and drag the box to another location.

### To resize the Toolbox in a report template or layout

- 1. Open a report template or layout.
- 2. Position the pointer over any side of the **Toolbox**.
- 3. When the pointer changes to a double-sided arrow, click and hold the left mouse button, and then drag the arrow.

# Selecting more than one object in report templates or layouts

You can select more than one object at a time. This allows you to quickly change or move a block of objects. You can change common properties in the Properties window. For more information about changing properties in the Properties window, see <u>Using the Properties Window in a report template or layout</u>.

### To select all objects in a report template or layout

- 1. Open a report template or layout.
- 2. From the **Edit** menu, click **Select all**.
- 3. (Optional) To remove one or more objects in your selection, press and hold **SHIFT**, and then click the object(s) to cancel the selection.

### To select an individual object in a report template or layout

- 1. Open a <u>report template</u> or <u>layout</u>.
- 2. Press **SHIFT**, and then click the objects.

### To select a block of objects in a report template or layout

- 1. Open a report template or layout.
- 2. Click inside the form, next to the objects you want to select (do not click on an object), and drag to include all objects in your selection.
  - When you drag your pointer, a "box" surrounds the objects included in your selection.



Start dragging from the object closest to the top and left corner, down to the object in the bottom and right corner.

## Selection handles in report templates or layouts

### **Selection handles**



When you select multiple objects, the selection handles appear around the objects. You can modify properties for the selected objects, such as the width. The selection handles for the last object you selected are black.

# Showing and hiding gridlines in report templates and layouts

Gridlines display by default to help you align fields and objects in a layout or a template. You can disable gridlines so that they do not appear.

### To show or hide gridlines in a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **View** menu, click **Grid**.

If a check mark appears next to the command, the item will display. If no check mark appears, the item is hidden.

### To show or hide gridlines in a layout

- 1. Open the Layout Designer.
- 2. From the **Format** menu, point to **Grid**, and then click **Show Grid**.

If a check mark appears next to the command, the item will display. If no check mark appears, the item is hidden. To align objects to the grid, see <u>Aligning fields and objects</u>.

# Turning on Snap to Grid in report templates or layouts

Snap to grid makes it easy to align objects by positioning them on specific gridlines in a template or layout.

### To turn on or off snap to grid in a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **View** menu, click **Snap to Grid**. To undo the command, click the command again.

### To turn on or off snap to grid in the Layout Designer

- 1. Open the Layout Designer.
- 2. From the **Format** menu, point to **Grid**, and then click **Snap to Grid**. To undo the command, click the command again.

# Sorting the properties list in report templates or layouts

### To sort properties alphabetically in a report template or layout

- 1. Open the **Properties Window**.
- 2. Select the object for the attributes you want to sort, and then click the **Alphabetic** button on the **Properties Window**.

### To sort properties by category in a report template or layout

- 1. Open the **Properties Window**.
- 2. Select the object for the attributes you want to sort, and then click the **Categorized** button on the **Properties Window**.

## **Understanding sections in report templates**

Report templates allow you to create sections of information. The type of information you can display on a template depends on the report type you are creating: a contact, company, group, product, or opportunity report template.

Each report type allows you to specify the type of information you want to display in the sections of the report. For example, in an Opportunity report template, you add opportunity fields to the sections. In a Contact report template, you add contact fields to the sections.

A new template has five default sections:

Report Header
Page Header
Detail
Page Footer
Report Footer

You cannot delete or change the order of the five default sections, but you can hide a section that you do not want to display, add fields to a section, indicate the page break behavior for a section, and resize a section to make room for fields.

You can also add a new section to a template. Section titles for new sections and the five default sections do not appear in the report. When you add a section, you also add a section header and footer. You can add fields and text that contain the information you want to include in the report.

For example, to create a report template to generate the secondary contact name and all phone numbers associated with the secondary contact, in the section header, add text called Secondary Contact Name and Numbers. In the detail area of the section, add the name and number fields.

For new sections, you can specify the sorting behavior or delete it. For more information on adding a section, see <u>Adding and removing a report section</u>.

### How do I...?

Add and remove a report section

Hide a section in a report template

Showing a section in a report template

Resize a section in a report template

Setting options for a section in a report template

## **Understanding summary fields**

A summary field allows you to display information from one or more records. For example, you can add a summary field to calculate the total number of opportunities you lost to a competitor.

When you add a summary field, you select the type of summary field it is:

- **Count** Displays the total number of records that contain data in the selected field.
- •Total Displays the total of all values in the selected field.
- **Average** Displays the average of all values in the selected field.
- **Minimum** Displays the lowest or earliest value in the selected field.
- **Maximum** Displays the highest or latest value in the selected field.

Any field can be added as a Count summary field, but only numeric fields can have a Total, Average, Minimum, or Maximum type.

## How do I...?

Add a summary field to a report template

## **Understanding subreports in report templates**

You can use subreports to show multiple types of objects for each contact, company, group, or opportunity in a report. For example, to display the notes and histories for each contact, you can create two subreports, one for notes and one for histories.

When you add a subreport to a template, you create a report within a report. A subreport contains the same basic information as a regular report, such as the five default sections, that you can modify by adding fields and objects and specifying options. For information about sections, see <u>Understanding sections</u> in report templates.

By default, the five default sections associated with the subreport are hidden. You can change the settings for the sections to make them visible, and then you can select the information you want to display on the subreport.

### How do I...?

Add a subreport to a report template
Viewing a subreport from a report template
Show a section in a report template
Work with objects on a report template

# Using the Properties Window in report templates or layouts

The Layout and Report Designers provide a Properties Window that displays attributes for fields and objects. You can modify field and object attributes in a layout or report template manually or by using the Toolbox or Properties window.

For example, if you want to enlarge the size of a field, you can use the <u>handles</u> on the field to drag it to the size you want, or you can click the field, and then change the size in the Toolbox or Properties window. Using the Properties window is more accurate, especially if you want some of the fields in your form to have the same attributes.



The Properties window allows you the flexibility to change field and object attributes that you may not be able to access in the Toolbox or through the Field Properties dialog box.

### How do I...?

Open the Properties window

Move or resize the Properties window

View field and object attributes

Sort the properties list

Working with fields and objects in the Properties window

# **Related topics**

About layouts and the Layout Designer
About report templates and the Report Designer

### Using the Toolbox in report templates or layouts

You can use the Toolbox in the Report and Layout Designers to create or modify fields and objects in report templates and layouts.

In the Layout Designer, tools are found in two groups in the Toolbox: Field and Drawing. The Field tools are: Field, Memo Field, Picture Field, YesNo Field, Record Manager, and Access. The Drawing tools are: Text, Image, Rectangle, and Ellipse. You can use the tools to add fields and objects to the layout.

In the Report Designer, the Toolbox contains the following tools: Field, Text, Rectangle, Picture, Picture Field, System Field, and Subreport. You can use the tools to add fields and objects to a report template.

In both designers, the Toolbox displays by default, but you can hide it if you do not want it to display. For information about showing or hiding the Toolbox, see <a href="Showing and hiding the Toolbox">Showing and hiding the Toolbox</a>.

#### To access a tool in the Layout Designer

- 1. Open the Layout Designer.
- 2. From the **Toolbox**, click the group button under which the tool exists (**Drawing** or **Field**), and then click the tool.

### To access a tool in the Report Designer

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **Toolbox**, click the tool you want to use.

# **Creating and saving report templates**

#### To create a report template

- From the **Reports** menu, click **New Template**.
   The New Report dialog box appears. For field definitions, press F1.
- 2. From the **Report Types** list, select the type of report you want to create. For example, to create a report that shows contact information, select **Contact Reports**.
- 3. From the **Templates** list, select an existing report that is similar to the one you want to create, or create a blank report by clicking the empty report option for the report type you selected, such as **Empty Company Report** or **Empty Opportunity Report**, and then click **OK**.

The template appears in the Report Designer. Now you can add fields, select background colors, text fonts, graphics, and so on using the <u>Toolbox</u> and <u>Properties</u> window. See <u>About report templates</u> and <u>Understanding</u> sections in report templates for more information and links to options for working with your template.

### To save a report template

1. From the toolbar, click the **Save Report** button.



If you save a report template to a personal folder, it cannot be synchronized.

2. In the **Save Report** dialog box, type a name for your report in the **File** name field, and then click **Save**.

# **Modifying report templates**

### To modify a report template

- 1. From the **Reports** menu, click **Edit Template**.
- 2. From the **Open ACT! Report** dialog box, select the report you want to modify, and then click **Open**.

Now you can add or remove fields, sections, objects, and text using the toolbars and <u>Properties window</u>. See <u>About report templates</u> for more information and links to options for your template.

# **Working with objects on report templates**

You can odd fields and objects to a report template. Fields you can add include system fields, summary fields, and picture fields. Objects you can add include subreports, pictures, report sections, and rectangles.

You can decide where to place fields and objects, and you can modify their attributes.

### How do I...?

Add, edit, and remove fields and objects
Add and edit text
Position and resize fields and objects
Modify borders and colors

# Changing the common properties for multiple objects at one time

You can change the common properties of all fields and objects at one time. Some of the common properties for all fields and objects are the alignment properties, which align objects left or right. You can change the alignment of all objects through the Format menu in both the Report and Layout Designer.

You can also change the common properties for a group of objects. For example, you can select multiple field labels and use the Properties window to change the font properties for the labels. For more information about selecting multiple objects, see <u>Selecting more than one object in a report template or layout</u>. For more information about the Properties window, see <u>Using the Properties</u> <u>Window in a report template or layout</u>.

#### To change the common properties for objects at one time

- 1. Open a report template or layout.
- 2. Select the objects you want to change. If you want to change all objects, from the shortcut menu, click **Select All**.
- 3. Modify the objects using the options on the **Format** menu.

# **Using rulers on report templates**

Rulers display by default to help you align objects in a report template.

### To show or hide rulers on a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **View** menu, click **Ruler**.

If a check mark appears next to the command, the item displays. If no check mark appears, the item is hidden.

### To change ruler settings on a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **View** menu, click **Ruler Settings**.
- 3. From the **Ruler Settings** dialog box, select **Inches** or **Centimeters**, and then click **OK**.

# Filtering data in report templates

You can specify the data that appears in a report by setting filters (see <u>Running a report</u>). You can set filters each time that you run a report, or you can save filter settings with a report template so that they are applied by default each time you run the report. You can modify the default filter settings when you run a report.

### To specify data in a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **Edit** menu, click **Define Filters**.
  - The Define Filters dialog box appears. The options available from the dialog box depend on the report that is being edited. For example, opportunities reports only display options for opportunities. For field definitions on any tab, press F1.
- 3. In the **General** tab, select the default output setting for the report from the **Send the report output to** list.
- -**ම**-
- Preview a report before printing it by selecting Preview from the Send the Report Output To list.
- 4. From the **Create report for** box, select the option you want to use in creating the report.
- 5. To indicate which user's data to include in the report, select **All Users** or **Selected Users**. If you choose Selected Users, select the users from the list.
- 6. Select the data to include in the report from the **Activity**, **Note**, **History**, and **Opportunity** tabs, and then click **OK**.

# Viewing a subreport from a report template

### To view a subreport from a report template

1. Create or modify a report template.

The report appears in the Report Designer.

2. Double-click the subreport.

The subreport appears in the Report Designer. To switch between the report and subreports, in the Subreports list, click the name of the report or subreport you want to view.

# **Undoing changes in report templates or layouts**

### To undo your most recent change in a report template or layout

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the toolbar, click the **Undo** tool.



To redo a change, click the Redo button.

# **Previewing report templates**

### To preview a template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. From the **File** menu, click **Print Preview**.

# **Deleting report templates**

### To delete a report template

- 1. From the **Reports** menu, click **Edit Templates**.
- 2. From the **Open ACT! Report** dialog box, select the template you want to delete, and then press **DELETE**.
- 3. Click **Yes** to confirm the deletion.

# **Saving report templates**

### To save an existing report template with the same name

- 1. Create or modify a report template.
  - The report appears in the Report Designer.
- 2. On the toolbar, click the **Save Report** button.

### To save a modified template with a different name

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. From the **File** menu, click **Save As**.
- 3. In the **Save Report** dialog box, type the **File name**, and then click **Save**.

# About importing and exporting data

There are several ways to import and export data: using the Import and Export Wizards, importing or exporting records attached to e-mail messages, importing or exporting product lists and drop-down list values, and export list view data to Microsoft Excel.

Using the Import and Export Wizards, an Administrator or Manager user can import data to and export data from ACT! databases and other software programs. For example, you can import records from another ACT! database or from another program such as Microsoft Outlook or Palm OS Desktop. You can export records to another ACT! database or to a delimited text file.

# Click here for programs and file types to import data using the Import Wizard

# Click here for programs and file types to export data using the Export Wizard

When you import or export data, you may have to assign, or *map*, the data to the other program's fields. If you import or export data to or from another ACT! database, many fields are mapped by default, but you can change the mapping and save a custom map. If you import contact data from another program or file, you can use one of several predefined maps included with ACT! Premium for Web Server.

# Click here for programs for which ACT! Premium for Web Server has predefined maps

You can also set up merge options to specify how ACT! Premium for Web Server identifies potential duplicate contact, group, and company records when you import from or export to another program or ACT! database.

Standard users and above can import or export ACT! contact, company, or group records that are attached to e-mail messages.

An Administrator or Manager user can import and export product lists and dropdown list values. Product lists are associated with opportunities.

Standard users and above can export data from the Contact List, Group List, Company List and Opportunity List views.

### How do I...?

Use Import and Export Wizards
Import or export records attached to e-mail messages
Import or export product lists and drop-down list values
Export to Excel

# **Related Topics**

Tips for a successful data import

About importing and exporting list values

# Tips for a successful data import

The following tips can help you have a successful data import:

- Before importing data, you should <u>enable duplicate checking</u> to merge any duplicate records with existing ACT! Premium for Web records. Enabling duplicate checking is especially important if you want to import Outlook data and have previously updated your ACT! Premium for Web and Outlook calendars.
- ACT! Premium for Web 7.x handles the set-up of custom and monthly recurring activities differently than in previous versions (3.x-6.x) of ACT!. If you import custom or monthly recurring activities from a previous version, you will notice a difference in the set up of the activities that repeat on more than one day of each week in a month. To change how recurring activities display, see Scheduling a recurring activity.
- Consider the following information before you import your Microsoft Outlook or Exchange data into ACT!
- Consider the following information before you import Palm Desktop OS data into ACT!

# **Importing ACT! data**

An Administrator or Manager user can import data from another ACT! database. When you import contact or group records from a previous version of ACT! (ACT! 3.x - 6.x allowed), all notes, histories, activities, and opportunities associated with the contact and group records will import.

Read <u>Tips for a successful import</u> before you begin importing.

#### To import ACT! data

- 1. Open the ACT! database you want to import data to.
- 2. From the **File** menu, click **Import**.
- 3. Follow the instructions the screens, clicking **Next** to advance. Press **F1** for more help.

You will be asked to specify options including:

- The file type
- The file name and location
- The type of records to import
- How fields should be mapped
- 4. Click Finish.

The Importing Data progress indicator appears. If you selected the Confirm each match option on the Specify Merge Options screen, if duplicate records are found while importing, you can decide to create a new record, merge the record with the existing record, or skip the import of the record. See <u>Selecting contact</u>, <u>group</u>, <u>or company merge options</u>.

# **Importing data from other programs**

An Administrator or Manager user can import data from other programs using the Import Wizard. See <u>About importing and exporting data</u> for the specific program types. When you import data from other programs, you need to import the contact records, then any group records, and finally any company records. Some programs allow you to import appointments, notes, journal entries, or tasks as ACT! notes or activities.

Read <u>Tips for a successful import</u> before you begin importing.



ACT! accepts only numeric telephone numbers. If you import contact records with alpha-numeric telephone numbers, ACT! displays only the numeric characters in the Phone field.

#### To import data from other programs

- 1. Open the ACT! database you want to import data to.
- 2. From the **File** menu, click **Import**. The Import Wizard opens.
- 3. Click Next.
- 4. On the **Specify Source** screen, select the type of program or file you want to import from, and then type the file name and location of the source. Press **F1** for more help.



- For some programs, such as Microsoft Outlook, you may not need to specify a location.
- •The screens of the Import Wizard differ according to the type of program or file you are importing from.
- 5. Follow the instructions on the screens, clicking **Next** to advance, and then click **Finish**.

The importing records progress indicator appears. When finished, the imported data is in the open ACT! database.

# **Exporting ACT! data to another ACT! database**

Using the Export Wizard, you can export contact, company, and group records to another ACT! database. You can specify whether to export only the current lookup, the current record, or all records; you can determine field mapping; and you can set merge options for the records.

If you are exporting ACT! data to a new ACT! database, you must create the new ACT! database before you begin using the Export Wizard. One way to do this is to save an empty copy of the ACT! database you are exporting from.



Only users with Administrator or Manager roles can export data using the Export Wizard.

### To export ACT! data to another ACT! database

- 1. Open the ACT! database you want to export data from.
- 2. From the **File** menu, click **Export**. The Export Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for more help.
- 4. On the **Completing Export Wizard** screen, read the information, and if correct, click **Finish**.

If the information is not correct, click Back until you reach the screen that needs correction.

The Exporting Data progress indicator appears. When exporting is complete, the ACT! database containing the exported data is saved in the location you specified.

# **Exporting ACT!** data to a delimited text file

Administrator or Manager users can export ACT! data to a delimited text file using the Export Wizard. You can export ACT! data to a delimited text file for use in another program. For example, you can create a file for someone who does not have access to ACT!.

When exporting to a delimited text file, you must export contact, group, or company records separately. You can specify the field delimiter characters and the order of the fields.

### To export ACT! data to a delimited text file

- 1. Open the ACT! database you want to export data from.
- 2. From the **File** menu, click **Export**. The Export Wizard opens.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for more help.
- 4. On the **Completing Export Wizard** screen, read the information, and if correct, click **Finish**.

If the information is not correct, click Back until you reach the screen that needs correction.

The Exporting Data progress indicator appears. When exporting is complete, the file containing the exported data is saved in the location you specified.

# **Exporting ACT! list view data to Microsoft Excel**

You can export the Contact List, Group List, and Company List data to Microsoft Excel. You must have Excel versions 2000, 2002, or 2003 installed.

Before you export to Excel, you can <u>customize the columns</u> on the list views. The columns and data that are shown on the ACT! list view are exported to Excel columns.



Only Standard users and above can export list data to Excel.

### To export ACT! list view data to Excel

• From the **Contact List**, **Group List**, or **Company List**, click the **Export to Excel** tool.

Excel opens with the list view data displayed. You can also export the Opportunity List to Excel. For more information, see <a href="Exporting and viewing a list of opportunities">Exporting and viewing a list of opportunities</a>.

# Merging attachments into an ACT! database

You can merge contact, group or company records, and activities from e-mail messages into your ACT! database



Standard users and above can merge the attached records into an ACT! database.

### To merge an attachment into an ACT! database

- 1. Open the e-mail message containing the contact, group or company record, or the activity, and then double-click the attachment.
  - The Merge Options dialog box opens. Press F1 for more information.
- 2. In the **If source records match destination records** box, specify the action for the record or activity.
- 3. In the **If source records do not match destination records** box, specify whether or not you want to add the record or activity.
- 4. Click **OK**.



The "source records" are the records in the attachment; the "destination records" are the records into which you are merging.

### Selecting contact, group, or company merge options

When importing or exporting contact, group, or company data from/to another program or ACT! database, you can select merge options for each record type. Also, when you merge a contact, company, or group record attached to an e-mail message, you can select merge options.

Merge options allow you to replace the destination record, use the source record, add items, or make no change. This applies to duplicate records found and new records being imported. ACT! provides default merge options for each record type.

# To select contact, company, or group merge options when importing or exporting

- 1. On the **Specify Merge Options** screen, do one of the following:
- To select your own merge options for a record type, click the appropriate button to open the **Merge Options** dialog box for each record type. Make changes as needed on each screen. Press **F1** for more information.
- To use the default merge options provided by ACT!, click **Next**.
- 2. To view the duplicate records found before records are merged, click **Confirm each match**, and then click **Next**.
- 3. Continue through the wizard until completion, and then click **Finish**.
- 4. If you selected to confirm each match, the **Match Confirmation** screen appears for each duplicate record found. You can choose to create a new record, merge the record, or skip any action. Press **F1** for more information.

# **About importing and exporting list values**

When you create or modify a field, you can define it as a drop-down field that includes a list of values. You can add lists to the field manually or import them into the field from another file, program, or ACT! database. To import lists, you must create a *delimited text file*.

You can also export lists from ACT! into a text file for use in word-processing documents, another ACT! database, or other programs, such as Microsoft Excel.

For example, when you create an opportunity, you enter the name of your product or service; the type of product, service, or sale; and any competitors. If you have a list of products, sales types, or competitors from another ACT! database or text file, you can import those lists so that you do not have to recreate them.

### **Understanding delimited text files**

When you import text delimited items created in another program, or values from another ACT! database into a drop-down list, the file can include the value or both the value and its description.

Text files that include only values appear as shown here (<CR> indicates a carriage return):

```
"North"<CR>
"Central"<CR>
"South"<CR>
```

Text files containing both values and descriptions appear with the value and description in separate sets of quotation marks with commas separating the two, as shown here:

```
"North","UK, Denmark, Norway"<CR>
"Central","France, Germany, Belgium"<CR>
"South","Italy, Spain, Portugal"<CR>
```

# How do I...?

Create a delimited text file Managing a drop-down list

# **Mapping fields**

When you import or export data, you may have to assign, or *map*, the data to the other program's fields. If you import or export data to or from another ACT! database, many fields are mapped by default, but you can change the mapped fields and save the custom map. If you import contact data from another program or file, you can use one of several predefined maps included with ACT!. See <u>About importing and exporting data</u> for predefined map files included with ACT!.



If the data you are importing contains custom fields, then you must manually map the fields. A predefined map will not work for these fields.

To map fields using a predefined map when importing
To map fields manually when importing
To map fields when exporting to an ACT! database file
To map fields when exporting to a text-delimited file
For more information, see Loading and saving a map file.

# **Loading and saving map files**

You can load a predefined map file included with ACT! Premium for Web Server, or you can load a custom map file you created. You can also create and save a custom map file. See <u>Mapping fields</u> for more information.

### To load a map file

- 1. In the **Contact Map**, **Group Map**, or **Company Map** screen, click **Load Map**.
- 2. In the **Load Map File** dialog box, locate the map file, and then click **Open**.

### To save a custom map file

- 1. In the **Contact Map**, **Group Map**, or **Company Map** screen, follow the instructions to <u>map fields manually when importing</u>, and then click **Save Map**.
- 2. In the **Open** dialog box, select a folder in which to save the map, type a **File name**, and then click **Save**.

### About fields and field attributes

You can modify or add fields to any contact, group, or company layout. You can also specify field attributes, such as the size of the field, whether it is a text or numeric field, and whether it includes a drop-down list. You can also set "triggers" for fields so that they launch an application or activity series when you enter or exit a field or change information in it.



For Opportunity Fields 1-8, you can only change the attributes for Field name and Field length.

You can add special *data types* called *annual events*. You can perform a lookup to view annual event fields, such as birth dates, anniversaries, or policy renewals. You can also add Address and Phone data types. Address and Phone data types have several fields associated with them so that when you add an Address or Phone data type, you add the associated fields. The address fields are: Address 1-3, City, Country, State, and ZIP Code. The phone fields are: Phone and Extension.



You must be an Administrator or Manager and have exclusive access to the database to modify or create fields. If multiple users have access to the database, you will be asked to lock the database before you can make changes. Users using a remote database cannot use the Define Fields feature.

For more information, see the <u>Customization Tour</u>.



When you create a database, certain fields are defined as core fields, such as the Contact field. You cannot delete core fields.

### How do I...?

Change field names and attributes

Create a field

Create and edit address or phone fields

Managing a drop-down list

Set triggers to launch an application or activity series from a field

# **Related topics**

About importing and exporting list items
About layouts and the Layout Designer
About annual events

### **About annual events**

You can create annual event fields that help you track events for important dates such as birthdays, anniversaries, or policy renewals. Annual event fields are set up like other date fields in ACT! Premium for Web Server and, like other fields, can have specific options selected for them, such as whether the annual event is a required field, generates a history, or is protected.

Annual events do not display on calendars, but you can set a recurring To-do activity and an alarm to notify you of them. You can also perform a lookup of annual events to set a recurring To-do activity or custom activity for the event.



If you currently use a custom field to track annual dates, but want to use the annual events feature, you must copy and replace those custom date fields, so that you do not lose data. See <u>Copying an annual event field</u> for more information. Additionally, it is strongly recommended that you back up your database before performing a copy and replace.

## How do I...?

**Work with annual events** 

# **Related topics**

About activities

# **Creating fields**

You can create a field to add to one of your layouts. First, create the field, then add the field to the layout using the Layout Designer. You can also add a field label from the Layout Designer. For more information about the Layout Designer, see <u>About layouts and the Layout Designer</u>. For more information about customizing ACT!, see the <u>Customization Tour</u>.

#### To create a field

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. In the **View fields for** list, select the record type for which you want to create a field (Companies, Contacts, or Groups).
- 3. In the **Field Tasks** box, click **Create new field**.
- Address, E-mail, and Phone data types have several fields associated with them, such as City, State, and ZIP Code for an Address data type. If you add an address, e-mail, or phone data type, you add all the fields associated with that data type.
- 4. Follow the directions on the screen, pressing **Next** to advance through the screens.
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When naming a field, it is recommended that you do not include special characters (such as <, >, \$, or :) in the field's name.

# **Editing fields**

You can edit any field's name or attributes; however, changing the field name through define fields will not change the field name in the layout. For information about changing the field name in a layout, see <u>About layouts and the Layout Designer</u>.



If you change the field name for a field used in lookups, the command may not work; and changing a field attribute may cause a loss of data. For example, if you change a field that contains alphanumeric data to a date/time field, all existing data in that field will be lost. Additionally, if you synchronize, the field you edited will no longer synchronize data with other databases.

#### To edit a field

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. In the **View fields for** list, select the record type for which you want to edit a field (Companies, Contacts, Groups, or Opportunities), and then select the field you want to edit.



You can only edit the field name and length for Opportunity Fields 1-8.

- 3. From the **Field Tasks** list, click **Edit field**.
- 4. Follow the directions on the screen, pressing **Next** to proceed to the next screen. For more detailed help, from any panel, press **F1**.



To avoid losing data, you should only shorten field lengths if the fields contain no data or you are certain the existing data will fit in the changed field. You should also avoid changing field types, such as changing a field from character to number.

## Creating and editing address, e-mail, or phone fields

When you create a field with an Address or Phone data type, the fields associated with the data type are created. The address fields are: Address 1-3, City, Country, State, and ZIP Code. The phone fields are: Phone and Extension. You can edit the fields individually, but you cannot edit the fields when you create them.

When you create a field with an E-mail data type, you must finish creating the field before you can edit it. You can only create an e-mail field for contacts.

### To create a field with an Address, E-mail, or Phone data type

- 1. <u>Create</u> a field. While in the **Enter field name and type** screen, from the **Field data type** list, select **Address**, **E-mail**, or **Phone**.
- 2. Click Finish.

The address, e-mail, or phone fields appear on the Create, edit, or delete fields screen, in the Field Name list.

#### To edit an address, e-mail, or phone field

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. In the **View fields for** list, select the record type that contains the address, e-mail, or phone fields (Companies, Contacts, or Groups), and then select the field you want to edit.
- 3. From the **Field Tasks** list, click **Edit field**.
- 4. Follow the directions on the screen, clicking **Next** to proceed to the next screen. For more detailed help, from any panel, press **F1**.

# **Creating annual event fields**

### To create an annual event field

<u>Create</u> a field. While in the **Enter field name and type** screen, from the **Field data type** list, click **Annual Event**, and then continue creating the field.

# **Copying annual event fields**

If you currently use custom fields for recording annually recurring events, such as your contacts' birthdays, you can change those date fields to annual event fields. You may do this, for example, so that you can generate lookups for those annual event dates.



You can copy the contents of a field with the annual event contents if the field data type of the field is Date. For information on Date field data types, see <u>Data types</u>.

### To copy the contents of a field with the annual event contents

- 1. Create an annual event field.
- 2. In the **Contact** window, perform a lookup to find the contacts whose records you want to update.
- 3. From the **Edit** menu, click **Copy Field**.
- 4. From the **Copy Data** dialog box, select the field you want to copy from the **Copy contents of** field. For field definitions, press F1.
- 5. From the **To** field, select the field you want to copy the contents to, and then click **OK**.
- 6. To confirm the selection, click **Yes**.
  - You can verify that the proper dates have copied into the annual event field by <u>creating a custom report</u> that compares the information in both fields.



All contacts in the current lookup will be affected by this procedure. If you want to cancel this procedure, press ESC. Changes made prior to canceling will remain in effect.

# Launching an application, activity series, or URL

You can specify whether to launch an application, URL, or activity series from a field. This is known as creating a field trigger.

### To set a field trigger that launches an activity series

- 1. <u>Create</u> or <u>modify</u> a field. For field definitions, press **F1**.
- 2. In the **Set field triggers** screen, set one of the following trigger options:
- To set a trigger when the value in a field is changed, in the **When changing a field, launch** box, select **Activity Series**, and then click the browse (...) button.
- To set a trigger when moving the cursor into the field, in the **When entering a field, launch** box, select **Activity Series**, and then click the browse (...) button.
- To set a trigger when moving the cursor out of the field, in the When leaving a field, launch box, select Activity Series, and then click the browse (...) button.

The Activity Series dialog box appears. For field definitions, press F1.

3. Select the activity series you want to launch, and then click **OK**.

## To set a field trigger that launches an application or URL

- 1. <u>Create</u> or <u>modify</u> a field. For field definitions, press **F1**.
- 2. In the **Set field triggers** screen, set one or more of the trigger options:
- To set a trigger when the value in a field is changed, in the **When changing a field, launch** box, select **Programs**, and then click the browse (...) button.
- To set a trigger when moving the cursor into the field, in the **When entering a field, launch** box, select **Programs**, and then click the browse (...) button.
- To set a trigger when moving the cursor out of the field, in the **When leaving a field, launch** box, select **Programs**, and then click the browse (...) button.
- 3. In the **Look in** list, select the folder that contains the file you want to launch.
- 4. If necessary, in the **Files of type** list, select the file type.

  By default, the selected file type is "Programs". To set a URL as the

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- launch file, select Internet Shortcut (\*.url), select the URL, and then click Open.
- 5. Select the file, and then click **Open**.

# **Deleting fields**



If you delete a field from a database, all data in that field is deleted. You should delete a field only if you are sure that you no longer need that data. However, you can delete a field from displaying on a layout. For information about deleting a field from a layout, see <u>About layouts and the Layout Designer</u>.

#### To delete a field

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. In the **View fields for** list, select the record type for which you want to delete a field (Companies, Contacts, or Groups), and then select the field you want to delete.
- 3. From the **Field Tasks** box, click **Delete field**.
- 4. Click **Yes** to confirm your deletion.

# Adding or deleting list values in fields

#### To add a list value to a field in a Detail view

- 1. From a **Detail** view, click the drop-down arrow for the field you want to add a value to.
- 2. Click Edit List Values.

The Edit List dialog box appears. For field definitions, press F1.

- 3. Click the **Add** button.
- 4. In the **Value** column, type the name of the list value you want to add.
- 5. (Optional) In the **Description** column, type a description of the list value.
- 6. Click **OK**.



When you click Add, you must type a Value before you can add or delete another value or close the dialog box. If you attempt to add or delete another value or close the Edit List dialog box before entering a value, a dialog box appears to direct you to either edit the value or delete the value.

#### To delete a list value from a field in a Detail view

- 1. From the **Detail** view, click the drop-down arrow for the field you want to add a value to.
- 2. Click **Edit List Values**.

The Edit List dialog box appears. For field definitions, press F1.

- 3. Select the value you want to delete, and then click **Delete**.
- 4. Click **Yes** to confirm the deletion.

# **Creating delimited text files**

### To create a delimited text file

1. In your word processor or Microsoft Notepad program, create a new document and type each item, enclosed by quotation marks, on a separate line. For example:

"United States"

"Canada"

"South America"



If you want to include a description of the item, place the description in quotation marks on the same line as the item, separated by a comma as follows:

"United States", "Includes only the 48 contiguous states."

2. Save the list as a text (.txt) file.

# Adding drop-down lists to fields

### To add a drop-down list to a field

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. Select a record type from the **View fields for** list, and then select a field name.
- 3. From the **Field Tasks** list, click **Edit field**.
- 4. From the **Enter field name and type** screen, select **Use drop-down list**, and then select a list.
- Only drop-down lists that are compatible with the field type can be selected.
- 5. Click Finish.

# **Managing drop-down lists**

Drop-down lists ensure consistency when entering data into fields. For example, if you keep information about your contacts' automobile types, you may have created a field named "Auto Type." If you decide you want to create a list of options from which to select, you can create a drop-down list describing automobile types, and then *connect* or <u>add</u> the list to your field.

### To create or edit a drop-down list

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1
- 2. From the **List Tasks** box, select **Manage drop-down lists**. The Create, edit, or delete drop-down lists screen appears.
- 3. To create a drop-down list, click **Create drop-down list** from the **Drop-down list tasks** box.

or

To edit a drop-down list, first select the drop-down list, and then click **Edit drop-down list** from the **Drop-down list tasks** box.

- 4. Type or edit the name of the drop-down list, select the list type, and type or edit a description of the list.
- 5. To allow users to edit items in the drop-down list, select **Allow users to edit items in this list**, and then click **Next**.
- 6. From the **Enter drop-down list values** screen, you can do the following:
- Add or delete drop-down list items
- Import drop-down list items
- Export drop-down list items
- 7. Click Finish.

### To delete a drop-down list



The following procedure removes the drop-down list entirely. You should delete the list only if you are sure that you no longer need the data.

- From the **Tools** menu, click **Define Fields**.
   The Define Fields window appears. For field definitions, press F1.
- 2. From the **List Tasks** box, select **Manage drop-down lists**.

The Create, edit, or delete drop-down lists screen appears.

- 3. Select the drop-down list you want to delete, and then click **Delete drop-down list** from the **Drop-down list tasks** box.
- 4. Click **Yes** to confirm the deletion.

# **About layouts and the Layout Designer**

ACT! Premium for Web Server includes contact, group, and company layout designs that you can choose to display. You can change the appearance of layouts by adding or modifying fields and objects and adding images or logos, so that information displays as you like.

Layouts are shared among all users in the database, and only administrators and managers can define layouts.

If you have layouts from a previous version of ACT!, you can convert them through Tools/Convert ACT! 3.0 - 6.0 Items or convert them by opening the layouts in the Layout Designer. For information about converting layouts through the Tools menu, see the <u>Customization Tour</u>.

To help you learn how to use the Layout Designer, see the <u>Customization Tour</u>.

## How do I...?

Use the Layout Designer
Work with fields in a layout
Work with tabs in a layout
Work with colors and images
Draw objects

# **Opening the Layout Designer**

## To open the Layout Designer

From the **Tools** menu, point to **Design Layouts**, and then click the layout type (**Contact**, **Group**, or **Company**) you want to open.

# **Closing the Layout Designer**

## To close the layout designer

• Click the **Close** button in the upper right corner of the **Layout Designer**.

# **Creating layouts**

### To create a new layout

- 1. From the **Tools** menu, point to **Design Layouts**, and then select **Contact**, **Group**, or **Company** to open the Layout Designer.
  - The layout you selected appears in the Layout Designer.
- 2. From the **File** menu, point to **New**, and then select the type of layout you want to create.

The layout appears in the Layout Designer. You can add fields and tabs, select background colors, text fonts, graphics, and so on using the <u>Toolbox</u> or <u>Properties window</u>. To add a field to a layout, the field must already exist in the database. If you need to create a field, see <u>Creating a new field</u>. For more information about layouts, see <u>About Layouts and the Layout Designer</u>, or see the <u>Customization Tour</u>.

# **Modifying layouts**

### To modify a layout

- From the **Tools** menu, point to **Design Layouts**, and then select **Contact**, **Group**, or **Company** depending on the type of layout you want to modify. The default ACT! Premium for Web Server layout displays.
- 2. Add or remove fields, objects, and text using the <u>Toolbox</u>, toolbars, menus, and the <u>Properties window</u>. See <u>About Layouts and the Layout Designer</u> for more information and links to options for your template.

# **Working with objects on layouts**

You can add fields and objects to a layout. Fields you can add include memo fields, access fields, and record manager fields. Objects you can add include pictures and rectangles.

You can decide where to place fields and objects, and you can modify their attributes.

## How do I...?

Add, edit, and remove fields and objects
Add, edit, and remove tabs
Add and edit text
Position and resize fields and objects
Modify borders and colors
Work with Tab and Enter Stops

# **Removing layouts**

### To remove a layout

- 1. Open **Windows Explorer** and navigate to where your layouts are stored. Layouts are typically stored in the Layout folder where your Database Files are stored.
- 2. Select the layout, and then press **DELETE**.
- 3. Click **Yes** to confirm your deletion.

# **Saving new layouts**

### To save a new layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **File** menu, click **Save As**.
- 3. In the **Save as** dialog box, type a name for the layout in the **File name** field, and then click **Save**.



Save a new layout with the same name as the database so you can easily associate the layout with the database. For example, if you modified the Alternate layout to use with an Employee database, you might want to save the layout as Employee.cly. Contact layouts are saved with a .cly extension; group layouts are saved with a .gly extension; and company layouts are saved with an .aly extension.

# **Attribute properties**

Click the links below to find properties beginning with that letter. If a link is unavailable, no properties begin with that letter.

# ABCDEFGHIJKLMNOPQRSTUVWXYZ

# Alignment

You can change the Alignment property from the Report Designer.

**Description:** Controls where the text displays.

**Used for:** Aligning text in a control in relation to the control's borders.

<u>Value</u>	Result
General	Aligns the text in the top left corner of the control's borders.
LeftTop	Aligns the text in the top left corner of the control's borders.
CenterTop	Aligns the text along the center and top of the control's borders.
RightTop	Aligns the text in the top right corner of the control's borders.
LeftBottom	Aligns the text in the bottom left corner of the control's borders.
CenterBottom	Aligns the text along the center and bottom of the control's borders.
RightBottom	Aligns the text in the bottom right corner of the control's borders.
LeftMiddle	Aligns the text along the middle of the left border of the control.
CenterMiddle	Aligns the text in the exact middle of the control's borders.
RightMiddle	Aligns the text along the middle of the right border of the control.
JustTop	Aligns the text in the top left corner of the control's borders.
JustBottom	Aligns the text in the bottom left corner of the control's borders.
JustMiddle	Aligns the text along the middle of the left border of the control.

**Default:** LeftMiddle

## To use this property

• Click in the right column of the **Alignment** field, and then select one of the options from the list.

# **Background Color**

You can change the Background Color property in both the Layout Designer and Report Designer.

**Description:** The color of the background.**Used for:** Background colors for forms.

<u>Value</u>	Result
Custom	Selecting the Custom tab displays a palette of colors to choose from.
Web	Selecting the Web tab displays a list of colors.
System	Selecting the System tab displays a list of colors.

**Default:** The Web tab displays.

### To use this property

- 1. Click the right column of the **Background Color** field.
- 2. From the list, select a color from the **Custom**, **Web**, or **System** tab.

# **Background Image**

You can change the Background Image property in the Layout Designer.

**Description:** A background image.

**Used for:** An image on the form's backgound.

<u>Value</u>	Result
HorizontalResolution	Displays the horizontal resolution, in pixels-per-inch. You cannot change this value.
PhysicalDimension	Displays the height and width of the image. You cannot change this value.
PixelFormat	Displays the pixel format of the image. You cannot change this value.
RawFormat	Displays the format of the image. You cannot change this value.
Size	Displays the width and height of the image. You cannot change this value.
VerticalResolution	Displays the vertical resolution, in pixels-per-inch. You cannot change this value.

## To use this property

- 1. Click the browse (...) button in the right column of the **Background Image** field, and then locate and select an image to add.
- 2. Click **Open**.

# **Border Style**

You can change the Border Style property from the:

**Layout Designer** 

**Report Designer** 

## **Border Thickness**

You can change the Border Thickness property in the Layout Designer.

**Description:** The thickness of the border surrounding a control.

**Used for:** Any drawing object, such as a rectangle.

### **Value**

### Result

1 though 35 Thickens the border depending on the number. The larger the number, the broader the thickness of the border.

**Default:** 1

#### To use this field

• Click in the right column of the **Border Thickness** field, and then select the option from the list.

# **Border Color**

You can change the Border Color property from the:

**Layout Designer** 

**Report Designer** 

## **Can Grow**

You can change the Can Grow property in the Report Designer.

**Description:** Indicates whether an item should automatically resize to fit

within a section.

**Used for:** Headers and footers to determine whether an item should

automatically resize to fit within a section.

<u>Value</u>	Result
Yes	Indicates the item will automatically resize to fit within a section.
No	Indicates the item will not automatically resize to fit within a
	section.

**Default:** Yes

### To use this property

• Click in the right column of the **Can Grow** field, and then select a value from the list.

### **Can Shrink**

You can change the Can Shrink property in the Report Designer.

**Description:** Indicates whether an item should automatically resize to fit

within a section.

**Used for:** Headers and footers to determine whether an item should

automatically resize to fit within a section.

<u>Value</u>	Result
Yes	Indicates the item will automatically resize to fit within a section.
No	Indicates the item will not automatically resize to fit within a section.

**Default:** Yes

#### To use this property

• Click in the right column of the **Can Shrink** field, and then select value from the list.

### **Dock**

You can change the Dock property in the Layout Designer.

**Description:** The docking location of a control.

**Used for:** Moving controls to the edge of the program window so that

they attach and become a feature of the program window.

**Default:** None

#### To use this property

• Click in the field to the right of the **Dock** field and use the diagram to select where the control will dock on your form by clicking the buttons representing **Top**, **Bottom**, **Right**, or **Left**. Click **None** if you do not want to allow the control to dock.

### **Edit Tabs**

You can change the Edit Tabs property in the Layout Designer.

**Description:** Allows the editing of tabs from the Edit Tabs dialog box.

**Used for:** The area where you define or edit properties for tabs.

#### To use this property

• Click the browse button in the field to the right of the **Edit Tabs** field. For more information about editing a tab, see <u>Adding and removing a tab using the Properties Window in a layout</u>.

# **Enter Stop Enabled**

You can change the Enter Stop Enabled property in the Layout Designer.

**Description:** Determines whether a control allows enter stops.

**Used for:** Specifying the order in which you move through a layout

when pressing the ENTER key.

<u>Value</u>	Result
True	Indicates that the user can move from the control to the next control by pressing the ENTER key.
False	Indicates that the user cannot move from the control to the next control by pressing the ENTER key.

**Default:** True

#### To use this property

• In the right column of the **Enter Stop Enabled** field, select **True** or **False** for the control.

# **Enter Stop Value**

You can change the Enter Stop Value property in the Layout Designer.

**Description:** Determines the number value associated with the control.

**Used for:** Specifying the order the control occupies in the ENTER

order.

### To use this property

• In the right column of the **Enter Stop Index** field, type the number for the control.

### **Field Value**

You can change the Field Value property in the Layout Designer.

**Description:** The field to which the control is bound. This indicates where

the field is from within the database and the information it displays. For example, the Home Phone control is bound to

the Home Phone field in the Contact window.

**Used for:** Displaying or changing a database field in a form.

#### To use this property

1. On the form, click the field control you want to change.

- 2. Click in the right column of the **Field Value** field in the **Properties** window to display a list of the fields to choose from the database.
- 3. Select the field.



When you change a field's value, the field label does not change. You can edit the field label by selecting it and then typing the value in the Text field of the Properties window.

### **Font**

You can change the Font property in both the Layout Designer and Report Designer.

**Description:** Specifies the font style, font type, font size, color, and other

font attributes.

**Used for:** Wherever text is used in a layout or template.

<u>Value</u>	Result
Name	The name of the font.
Size	The size of the font.
Unit	The unit of measurement.
Bold	Select <b>True</b> to bold.
GdiCharSet	Specifies the byte value that the object uses for the GDI character set.
GdiVerticalFont	Indicates whether the object is derived from a GDI vertical font.
Italic	Select <b>True</b> to italicize.
Strikeout	Select <b>True</b> to apply a strikeout.
Underline	Select <b>True</b> to underline.

### To use this property

• In the right column of the **Font** field, click the Browse button to display the **Font** dialog box where you can change fonts.

0r

Click the plus (+) sign next to **Font** to display font attributes. Select or type attributes as needed.



Click the attribute to display its description in the bottom of the Properties window.

# **Font Color**

You can change the Font Color property from the:

**Layout Designer** 

**Report Designer** 

# **Force Page Break**

You can change the Force Page Break property in the Report Designer.

**Description:** Forces a page break.

**Used for:** Headers and footers to force a page break at a certain place

within a section.

<u>Value</u>	Result
None	Does not apply a page break.
Before	Inserts a page break before the insertion point.
After	Inserts a page break after the insertion point.
BeforeAndAfter	Inserts page breaks before and after the insertion point.
PageBefore	Inserts a page break the page before the insertion point.
PageAfter	Inserts a page break a page after the insertion point.

**Default:** None

### To use this property

• Click in the right column of the **Force Page Break** field, and then select one of the options.

# Height

You can change the Height property from the:

**Layout Designer** 

**Report Designer** 

# **Keep Together**

You can change the Keep Together property in the Report Designer.

**Description:** Determines whether controls in the section should be kept

together on one page.

**Used for:** Headers and footers to determine whether controls in the

section should be kept together on one page.

<u>Value</u>	Result
Yes	Keeps controls within the section together.
No	Allows controls within the section to be separated by natural page breaks.

**Default:** Yes

#### To use this property

• Click in the right column of the **Keep Together** field, and then select **Yes** or **No** from the list.

### Location

You can change the Location property in the Layout Designer.

**Description:** The location of a control on the form's X and Y axis.

**Used for:** To place controls on forms.

#### To use this property

• In the field to the right of **Location**, type a number representing the X and Y axis where you want to place the control. Separate the numbers with a comma.

#### or

Click the plus (+) sign next to **Location** to display the **X** and **Y** fields, and then type the number representing the location of the control on the form's X and Y axis.

# Margin: Bottom, Left, Right, Top

You can change the Margin Bottom, Margin Left, Margin Right, and MarginTop properties in the Report Designer.

**Description:** Specifies the distance between the margins and the control. **Used for:** Aligning the control a specific distance from each border.

<u>Value</u>	Result
Margin Bottom	The distance between the control and the bottom margin.
Margin Left	The distance between the control and the left margin.
Margin Right	The distance between the control and the right margin.
MarginTop	The distance between the control and the top margin.

**Default:** 0

### To use this property

• In each of the margin fields, click the right column, and then enter the distance.



The distance measurement in controls depends on the ruler settings. To change your ruler setting, see <u>Using rulers</u>.

# **MaxPages**

You can change the MaxPages property in the Report Designer.

**Description:** The maximum number of pages for the report.

**Used for:** Specifying the maximum length of the report.

#### To use this property

• Click in the right column of the **MaxPages** field, and then type the maximum number of pages for the control.



To view this property in the Properties window, click an area outside the bottom or right border of the report template. You may need to scroll to view the border.

# **Multiline**

You can change the Multiline property in the Layout Designer.

**Description:** Determines whether tabs are listed on one line or multiple

lines.

**Used for:** Tab placement.

<u>Value</u>	Result
True	Allows tabs on multiple lines.
False	Allows tabs on only one line.

**Default:** False

#### To use this field

• Click in the right column of the **Multiline** field, and then select **True** or **False**.

### Name

You can change the Name property in both the Layout Designer and Report Designer.

**Description:** The name of the control item in the Properties window.

**Used for:** Naming the control.

### To use this property

• Click in the right column of the **Name** field, and then type the name of the item.

### **Orientation**

You can change the Orientation property in the Report Designer.

**Description:** Determines whether the report is in Portrait or Landscape

format.

**Used for:** Laying out the report in Portrait or Landscape format.

<u>Value</u>	Result
Auto	Automatically selects the report layout.
Portrait	Lays out the report in Portrait format.
Landscape	Lays out the report in Landscape format.

**Default:** Auto

#### To use this property

• Click in the right column of the **Orientation** field, and then select **Auto**, **Portrait**, or **Landscape**.



To view this property in the Properties window, click an area outside the bottom or right border of the report template. You may need to scroll to view the border.

# **Picture**

You can change the Picture property in the Report Designer.

**Description:** The name of the picture.

**Used for:** Adding a picture, such as a company logo, to a layout.

### To use this property

• In the right column of the **Picture** field, click the Browse button to locate and open the file.

# **PictureAlign**

You can change the PictureAlign property in the Report Designer.

**Description:** Indicates where the picture is placed within the borders of the

control.

**Used for:** Specifying the location of the picture within the control.

<u>Value</u>	Result
LeftTop	Aligns the picture in the top left corner of the control's border.
CenterTop	Aligns the picture at the top and center of the control's border.
RightTop	Aligns the picture in the top right corner of the control's border.
LeftBottom	Aligns the picture in the bottom left corner of the control's border.
CenterBottom	Aligns the picture at the bottom and center of the control's border.
RightBottom	Aligns the picture in the bottom right corner of the control's border.
LeftMiddle	Aligns the picture along the middle of the left border of the control.
CenterMiddle	Aligns the picture in the exact center of the control.
RightMiddle	Aligns the picture along the middle of the right border of the control.
Clip	Clips the picture to fit within the control's border.
Zoom	Magnifies the picture to fit the height of the control's border.
Stretch	Stretches the picture to fit the entire area within the control's border.
Tile	Tiles the picture across the control's border.

# To use this property

• Click in the right column of the **PictureAlign** field, and then select one of the options.

### **PictureShow**

You can change the PictureShow property in the Report Designer.

**Description:** Determines on which pages the picture appears in the

template.

**Used for:** Specifying on which pages to place the picture.

<u>Value</u>	Result
NoPages	Does not display the picture.
AllPages	Places the picture on all pages.
FirstPage	Places the picture on the first page only.
AllButFirstPage	Places the picture on every page except for the first page.

**Default:** AllPages

#### To use this property

• Click in the right column of the **PictureShow** field, and then select one of the options.



To view this property in the Properties window, click an area outside the bottom or right border of the report template. You may need to scroll to view the border.

# Repeat

You can change the Repeat property in the Report Designer.

**Description:** Determines whether the section should be repeated.

**Used for:** Headers and footers to determine whether the section should

be repeated on each page.

<u>Value</u>	Result
Yes	Repeats the section on each page.
No	Does not repeat the section.

**Default:** No

### To use this property

• Click in the right column of the **Repeat** field, and then select **Yes** or **No**.

# **ReportName**

You can change the ReportName property in the Report Designer.

**Description:** The name of the report.

**Used for:** The name of the subreport in the report template.

### To use this property

• Click the right column of the **ReportName** field, and then type the name of the subreport.

# **Rich Text**

You can change the Rich Text property in the Report Designer.

**Description:** Indicates whether the field contains rich text.

**Used for:** Specifying whether the field contains rich text.

<u>Value</u>	Result
Yes	Allows the field to contain rich text.
No	Does not allow the field to contain rich text.

**Default:** No

### To use this property

• Click in the right column of the **Rich Text** field, and then select **Yes** or **No**.

### **Size**

You can change the Size property in the Layout Designer.

**Description:** Determines the width and height of a control.

**Used for:** All controls on forms.

#### To use this property

• In the field to the right of **Size**, type a number representing the width and height of a control. Separate the numbers with a comma.

or

Click the plus (+) sign next to **Size** to display **Width** and **Height**. Type number representing the sizes.

# **Size Options**

You can change the Size Options property in the Layout Designer.

**Description:** Determines the image placement and the sizing of the control.

**Used for:** Setting the image within the control's boundaries.

<u>Value</u>	Result
Normal	Uses the normal size of the image.
StretchImage	Stretches the image to fit within the boundaries of the control.
AutoSize	Automatically sizes the boundaries of the control to fit around the image.
CenterImage	Centers the image within the boundaries of the control.

**Default:** Normal

#### To use this field

• Click in the right column of the **Size Options** field, and then select one of the options.

# **Tab Placement**

You can change the Tab Placement property in the Layout Designer.

**Description:** Controls where the tabs display.

**Used for:** Aligning tabs in layouts to display on the screen.

<u>Value</u>	Result
Top	Aligns tabs at the top of the boundary.
Bottom	Aligns tabs at the bottom of the boundary.

#### To use this property

• Click in the right column of the **Tab Placement** field, and then select **Top** or **Bottom**.

# **Tab Stop Enabled**

You can change the Tab Stop Enabled property in the Layout Designer.

**Description:** Determines whether a control allows tab stops.

**Used for:** Specifying the order in which you move through a layout

when pressing the TAB key.

<u>Value</u>	Result
True	Indicates that the user can move from the control to the next control by pressing the TAB key.
False	Indicates that the user cannot move from the control to the next control by pressing the TAB key.

**Default:** True

#### To use this property

• In the right column of the **Tab Stop Enabled** field, select **True** or **False** for the control.

# **Tab Stop Value**

You can change the Tab Stop Value property in the Layout Designer.

**Description:** Determines the number value associated with the control.

**Used for:** Specifying the order the control occupies in the TAB order.

### To use this property

• In the right column of the **Tab Stop Value** field, type the number for the control.

### **Text**

You can change the Text property in both the Layout Designer and the Report Designer.

**Description:** Text used on the report template or layout. **Used for:** Adding text to a report template or layout.

### To use this property

• In the right column of the **Text** field, type the information you want to include on the report template or layout.

# **Text Alignment**

You can change the Text Alignment property in the Layout Designer.

**Description:** Determines the alignment of the text.

**Used for:** Label, field, and tab names in a form.

#### To use this property

• Click in the field to the right of the **Text Alignment** field and use the diagram to select where the text will align within the control by clicking the buttons representing **TopLeft**, **MiddleLeft**, **BottomLeft**, **TopCenter**, **MiddleCenter**, **BottomCenter**, **TopRight**, **MiddleRight**, or **BottomRight**.

# **ToolTipText**

You can change the ToolTipText property in the Layout Designer.

**Description:** The text to display when tooltips are enabled and users rest

their cursors on a tab.

**Used for:** To briefly explain the information that is included within a

tab on layout, or to clarify the tab's name.

### To use this property

• In the right column of the **ToolTipText** field, type the name of the tooltip.

# Top

You can change the Top property in the Report Designer.

**Description:** Determines the distance between the control and the top of

the section.

**Used for:** Placing the control at a specific distance from the top of the

section.

#### To use this property

• Click in the right column of the **Top** field, and then enter the distance.



The distance measurement in controls depends on the setting specified in Ruler Settings. To set your ruler setting, see <u>Using rulers</u>.

### **Visible**

You can change the Visible property in the Report Designer.

**Description:** Indicates whether the control is visible within the report.

**Used for:** Determining whether the control is visible within the report.

<u>Value</u>	Result
True	Indicates the control is visible.
False	Indicates the control is not visible.

**Default:** True

### To use this field

• Click in the right column of the **Visible** field, and then select **True** or **False**.

### Width

You can change the Width property in both the Layout Designer and the Report Designer.

**Description:** Determines the width of the control.

**Used for:** Specifying the width of a control on a layout or template.

#### To use this field

• Click in the right column of the **Width** field, and then enter the width of the control.

# **Word Wrap**

You can change the Word Wrap property in the Report Designer.

**Description:** Indicates whether the text in a control wraps within the

control's boundaries.

**Used for:** Determining whether the text wraps within the control's

boundaries.

<u>Value</u>	Result
Yes	Automatically wraps text within the control's boundaries.
No	Does not wrap text within the control's boundaries.

**Default:** Yes

### To use this property

• Click in the right column of the **Word Wrap** field, and then select **Yes** or **No**.

You can change the X property in the Layout Designer.

**Description:** Specifies the X-coordinate of the top-left corner of the

control.

**Used for:** Placing the control on a layout.

### To use this property

• In the right column of the **X** field, type the number for the X-coordinate.

You can change the Y property in the Layout Designer.

**Description:** Specifies the Y-coordinate of the top-left corner of the

control.

**Used for:** Placing the control on a layout.

### To use this property

ullet In the right column of the  ${\bf Y}$  field, type the number for the Y-coordinate.

# **About customizing for efficiency**

You can customize ACT! Premium for Web Server to streamline the actions you perform most often and display the tools and data you use most frequently in an efficient way.

For example, you can:

- Customize menu bars, menus, and toolbars.
- Specify shortcut keys for commands you use frequently.
- •Add, remove, and reorder columns in many list views and tabs.

### How do I...?

Create and delete custom commands
Create toolbars and add tools
Delete a menu or command
Rename a menu or command

# **Related Topics**

Understanding menus, toolbars, and commands
About customizing menus and toolbars
About keyboard shortcuts
About columns in list views

## **About customizing menus and toolbars**

You can customize menus, toolbars, and commands to improve your productivity.

- •You can customize the menu bar to display only the menus and commands you need, and you can reposition items to match your work flow.
- •You can modify ACT! Premium for Web Server toolbars by adding or rearranging your favorite tools, removing those you rarely use, or creating your own custom toolbar.
- •You can modify the ACT! Premium for Web Server Navigation bar by adding commands you use frequently, or removing rarely used commands.

ACT! Premium for Web Server includes many customizable commands, menus, and toolbars, and gives you the flexibility to create additional commands to perform common actions such as launching another application, or opening a file.

## How do I...?

Customize menus and toolbars Customize the Navigation bar Work with custom commands

# **Related Topics**

About customizing for efficiency
Understanding menus, toolbars, and commands

## **Understanding menus, toolbars, and commands**

ACT! Premium for Web Server windows display a Navigation bar, a menu bar, and a toolbar that include menus, tools, or commands. All of these items can be modified or customized to meet your needs.

The Navigation bar appears on the left of any window. You can change the way it appears, such as with large or small icons, and you can customize it.

The menu bar is located at the top of all ACT! Premium for Web Server windows. You can add custom menus to the menu bar and modify some existing menus by adding commands. Commands assigned to the menu bar or menus are referred to as menu commands.

The toolbar is located under the menu bar. You can add toolbars or you can customize or modify the existing toolbar by adding commands. Commands assigned to toolbars are referred to as tool commands.

## **Creating toolbars and adding tools**

#### To create a toolbar

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, select the **Toolbars** tab, and then click **New**.
- 3. In the **New Toolbar** dialog box, type the name of the toolbar you want to add, and then click **OK**.
  - An empty toolbar appears in the upper left corner of the screen.
- 4. Click the toolbar you have just created, and drag it to where you want to display it on the screen. You can place it above the current toolbar, below the toolbar, or even to the side of the application.

#### To add tools to a toolbar

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Commands** tab.
- J
- If you have created custom commands, they will be listed on the Commands tab.
- 3. From the **Categories** list, select the category of tool, such as Contacts, Edit, File, and so on, that you want to add.
- 4. In the **Commands** list, click and drag the command (tool) onto the toolbar. Continue adding commands from this or other categories as needed, and then click **Close**.

## Customizing toolbar and menu displays

#### To change the toolbar display

From the **Tools** menu, point to **Customize**, and then click **Show Large Buttons**, or **Show Small Buttons**.

### To change menu displays

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. Click the **Options** tab.
- The default setting is to always show full menus. Select **Show full menus after a short delay** to view only the most used functions first, and then the full menu.
- Click the Reset my data usage button if you want to display the default menu items instead of your most used menu items.
- To display a brief explanation when you rest the pointer over a toolbar button, select **Show Tooltips on menus and toolbars.**
- To view shortcut keys, select **Show shortcut keys in tooltips.**
- To change the way the menus are drawn, select an option from the **Menu** animation list. The changes are very subtle.

## **Deleting menus or commands**

#### To delete a menu or command

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.

When the Customize Menus and Toolbars dialog box is open, all menus and toolbars are active.

- 2. Select the menu or command you want to delete, and then right-click.
- 3. From the shortcut menu, click **Delete**.



If you inadvertently deleted an ACT! menu or command, right-click and then select Reset All to restore the original settings.

## **Rearranging menus and commands**

### To change the order of menus or commands

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.

When the Customize Menus and Toolbars dialog box is open, all menus and toolbars are active.

2. Click the menu or command you want to move, and then drag it to its new location.



If you inadvertently moved an ACT! Premium for Web Server menu or command, right-click and then select Reset All to restore the original settings.

# **Renaming menus or commands**

#### To rename a menu or command

1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.

When the Customize Menus and Toolbars dialog box is open, all menus and toolbars are active.

- 2. Right-click on the tool, menu, or menu item to rename.
- 3. From the right-click menu, click in the **Name** field to activate it.
- 4. Type the new name in the field, and then press **Enter**.

# **Resetting menus and toolbars**

If you have customized menus, you can return them to their default settings.

#### To reset menus and commands

- 1. From the **Tools** menu, point to **Customize**, and then click **Reset Menus** and **Toolbars**.
- 2. Click **OK** to go back to the default settings.



Resetting a toolbar removes any tool or toolbar that you created in the application.

## **Adding separators between commands**

A command separator is a horizontal line that you can add to menus to group similar or related commands. You can add separators between commands on any menu, in any window.

#### To add a separator between commands

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
  - Once the Customize Menus and Toolbars dialog box is open, the menus and toolbars are active and editable.
- 2. Place your cursor where you would like to add a separator, and then right-click.
- 3. From the right-click menu, click **Begin Group**. The separator is added in front of the selected command.

## **Creating and deleting custom commands**



After creating a command, you must add it to a menu or toolbar or assign a shortcut key to it in order to use the command.

#### To create a custom command

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. From the **Customize Menus and Toolbars** dialog box, click the **Custom Commands** tab.
- 3. Click the **New** button to activate the fields.
- 4. In the **Command Name** field, type a name for the command.
- 5. In the **Tooltip Tex**t field, enter a short description of the command.
- 6. In the **Command Line** field, enter the exact file name and location of the application's executable file, document file, or macro file, or click **Browse** to locate the file.
- 7. Click the **Icon** button, locate the icon file, and then click **Open**.
- 8. Click **OK** to close the dialog box, and then click **Add Command**. For field definitions, press F1.

To add custom commands to a toolbar, see <u>Creating toolbars and adding tools</u>.

# **Copying and modifying custom commands**

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Custom Commands** tab.
- 3. Select the command in the **Custom Commands** list, and then click **Copy**. A new command is created with the information from the command you copied, however, you can modify the information as needed.
- 4. Click **Add Command**, and then click **Close**.

## **Assigning icons to custom commands**

#### To assign an icon to a command

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Custom Commands** tab.
- 3. Select the command that you want to add an icon to, and then click the **Icon** button.
- 4. In the **Select an Icon** dialog box, type the path, or click browse (...) to locate the file, and then click **OK**.



You must select a file with an .exe, .ico, or .dll extension. Executable files (with a .exe extension) generally contain multiple icons.

You can add the command to any toolbar.

### **About columns in list views**

Many ACT! Premium for Web Server windows and tabs contain lists of data in columns. These include the Contact List, Task List, Company List, Group List, Activities tab, Opportunities tab, Notes tab, History tab, and so on. You can change the display of information by adding, removing, rearranging, or resizing columns.



In all list views, regardless of the filters and lookups you choose, you see only the records you have the authority to view.

Views and tabs that include customizable columns

## How do I...?

Add and remove a column
Change the width of a column
Reposition a column

# Adding and removing columns

#### To add a column to a list view

- 1. Display the list view or tab you want to change.
- 2. Click **Options**, and then select **Customize Columns**.
- 3. In the **Customize Columns** dialog box, in the **Available fields** list, select one or more fields to add to the list view, click the right arrow button to move them to the **Show as columns in this order** list, and then click **OK**.

For information about changing the order of the columns, see <u>Repositioning a column</u>.

#### To remove a column from a list view

- 1. Display the list view or tab you want to change.
- 2. Click **Options**, and then select **Customize Columns**.
- 3. In the **Customize Columns** dialog box, in the **Show as columns in this order** list, select one or more fields to remove from the list view, and then click the left arrow button to move them to the **Available fields** list.

  The selected fields will be added to the bottom of the **Show as columns in this order** list.
- 4. Click **OK**.

## **Repositioning columns**

### To reposition a column from the list view or tab

- 1. Display the list view or tab you want to change.
- 2. Point to a column label, and then drag the column to a new position.

### To change column order using the Customize Columns dialog box

- 1. Display the list view or tab you want to change.
- 2. Click **Options**, and then select **Customize Columns**.
- 3. In the **Show as columns in this order** list, select a column to reposition, and then click **Move Up** or **Move Down** until the column is in the position you want.
  - The first field in the list displays in the leftmost column of the list view, the second displays just to the right of the first, and so on. The last field in the list displays in the rightmost column of the list view.
- 4. Click **OK**.

# **Changing column widths**

### To change column widths

- 1. Display the list view or tab you want to change.
- 2. Align the pointer with the edge of a column until the pointer changes to a double-headed arrow.
- 3. Drag the edge of the column to the right or left to set the new column width.

## **Changing the Navigation bar display**

By default, the Navigation bar appears on the left of every window and displays the large icons.

### To change the current Navigation bar display

Right-click in the **Navigation bar**, and then select **Large Icons** or **Small Icons**.

or

Right-click in the **Navigation bar**, and then select **Expanded Menu** or **Classic Menu**. Standard Menu is the default setting.

To customize the Navigation bar, see <u>Customizing the Navigation bar</u>.

# **Customizing the Navigation bar**

### To customize the Navigation bar

- 1. From the **Tools** menu, point to **Customize**, and then click **Navbar**.
- 2. In the **Customize Standard Menu** dialog box, you can drag commands to and from the navigation bar.
- 3. Click **Reset** to restore the default settings to the navigation bar.

## **About keyboard shortcuts**

You can assign keyboard shortcuts to commands to minimize keystrokes for common procedures.

When you create or change a shortcut for any of the primary Contact view commands listed below, ACT! Premium for Web Server also applies the new shortcut to the related Group view and Company view commands. However, you can assign different shortcuts for the group and company commands after you have assigned the contact shortcut.

#### Scenario 1

You want Ctrl+Shift+C to insert a new contact in Contact view, insert a new group in Group view, and insert a new company in Company view.

In Customize Menus and Toolbars, assign Ctrl+Shift+C to Insert Contact.

ACT! Premium for Web Server automatically assigns Ctrl+Shift+C to Insert Group and Insert Company.

#### Scenario 2

You want Ctrl+Shift+C to insert a new contact, but you want Ctrl+Shift+G to insert a new group, and Ctrl+Shift+P to insert a new company.

In Customize Menus and Toolbars, assign Ctrl+Shift+C to Insert Contact.

ACT! Premium for Web Server automatically assigns Ctrl+Shift+C to Insert Group and Insert Company, but you can change this. Select Insert Group and assign Ctrl+Shift+G, and then select Insert Company and assign Ctrl+Shift+P.

For detailed instructions, see Adding and deleting shortcut keys.

## Adding and deleting shortcut keys

#### To add a shortcut key

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Keyboard** tab.
- 3. In the **Categories** list, select the name of the menu that contains a command you want to assign a shortcut key to.
  - The Commands and Assigned shortcuts lists display the commands on the selected menu and the shortcuts that are currently assigned.
- To assign a shortcut key to a command that you created, select Custom Commands.
  - 4. In the **Commands** list, select a command, and then click **Assign Shortcut**.
  - 5. In the **Assign Shortcut** dialog box, press the key combination that you want to assign to the command.
    - If a command is currently using the shortcut key combination you pressed, it appears in Shortcut key currently assigned to. If you do not want to override the current assignment, press another key combination.
  - 6. Click **OK** to save the new assignment, and then click **Close**.

#### To delete a shortcut

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Keyboard** tab.
- 3. In the **Categories** list, select the name of the menu that contains a command you want to assign a shortcut key to.
  - The Commands and Assigned shortcuts lists display the commands on the selected menu and the shortcuts that are currently assigned.
- To delete a shortcut key from a command that you created, select Custom Commands.
  - 4. In the **Commands** list, select the command, and then click **Remove Shortcut**.
  - 5. Click Close.

# **Resetting shortcut keys**

### To reset keyboard shortcuts to the default settings

- 1. From the **Tools** menu, point to **Customize**, and then click **Menus and Toolbars**.
- 2. In the **Customize Menus and Toolbars** dialog box, click the **Keyboard** tab.
- 3. Click **Reset**, and then click **Close**.

# **Shortcut keys for navigating in ACT!**

You can use shortcut keys to navigate quickly within and between text boxes and between records.

To do the following:	Press:
Move the cursor one character to the left	Left Arrow
Move the cursor one character to the right	Right Arrow
Move the cursor to the beginning of the line	HOME
Move the cursor to the end of the line	END
Move the cursor to the first selection in the visible part of a drop-down list	PAGE UP
Move the cursor to the last selection in the visible part of a drop-down list	PAGE DOWN
Move the cursor to the next field or selection	TAB
Move the cursor to the next group stop field	ENTER
Move the cursor to the previous field or selection	SHIFT+TAB

# **Shortcut keys for all ACT! windows**

This table lists the keyboard shortcuts that can be used in all ACT! windows and views.

(\* Indicates different functionality within ACT! E-mail. See <u>Shortcut keys for E-mail windows</u>.)

To do the following	Press:
Attach a file	CTRL+I
Clear the selected activity *	CTRL+D
Close the open menu or dialog box without saving changes	ESC
Close the current file or database	CTRL+W
Copy the selected item or text	CTRL+C
Create a database *	CTRL+N
Cut the selected item or text	CTRL+X
Delete the selected contact, group, company, or lookup	CTRL+DELETE
Display online Help for the current dialog box or feature	F1
Display or hide the Mini-calendar	F4
Display the Timer	SHIFT+F4
Enable Tag mode in a list view	SHIFT+F8
Exit ACT! *	ALT+F4
Expand the drop-down list for the current field	F2
Import data from another file or database	ALT+F12
Insert a contact, group, or company	INSERT
Insert a note for the current contact, group, or company	F9
Insert a sales opportunity for the current contact	CTRL+F11
Insert a secondary contact	CTRL+INSERT
Look up annual events	CTRL+SHIFT+A
Move backwards between views *	ALT+Left Arrow
Move forward between views *	ALT+Right Arrow

Move the selected object to the back (design windows)	CTRL+B
Move the selected object to the front (design windows) *	CTRL+F
Open an existing file or database *	CTRL+O
Paste the cut or copied item or text	CTRL+V
Print contact information, calendars, or e-mail messages	CTRL+P
Record history	CTRL+H
Refresh the view	CTRL+F5
Reschedule an activity	CTRL+SHIFT+D
Save a copy of the current file or database with a new name	F12
Save the current file, database, or e-mail message	CTRL+S
Schedule a call	CTRL+L
Schedule a meeting *	CTRL+M
Schedule a to-do item	CTRL+T
Switch between the Timer and the current window	ALT+F6
Undo the last action *	CTRL+Z
View the Activities tab	ALT+F9
View the Company List	ALT+F10
View the Contact Detail window	F11
View the Contact List	F8
View the daily calendar	SHIFT+F5
View the Group List	F10
View the Groups/Companies tab	CTRL+F9
View the History tab	SHIFT+F9
View the monthly calendar	F5
View the Notes tab	ALT+SHIFT+F9
View the Opportunity List	SHIFT+F7
View the Task List	F7
View the weekly calendar	F3
View the work week calendar	SHIFT+F3

# **Shortcut keys for the ACT! Word Processor**

This table lists the shortcut keys that you can use in the ACT! Word Processor.

To do the following:	Press:
Check the spelling in a document	ALT+F7
Copy the selected item or text	CTRL+C
Cut the selected item or text	CTRL+X
Find text	CTRL+F
Insert a date	F2
Insert a hyperlink	CTRL+SHIFT+K
Insert a line break	ENTER
Insert a page break	CTRL+ENTER
Move the cursor down one line	Down Arrow
Move the cursor down one screen	Page Down
Move the cursor to the beginning of the current line	HOME
Move the cursor to the beginning of the document	CTRL+HOME
Move the cursor to the beginning of the next word or the next punctuation mark	CTRL+Right Arrow
Move the cursor to the beginning of the previous word or the previous punctuation mark	CTRL+Left Arrow
Move the cursor to the end of the current line	END
Move the cursor to the end of the document	CTRL+END
Move the cursor up one line	Up Arrow
Paste a cut or copied item or text	CTRL+V
Print the document	CTRL+P
Redo an action you just used the Undo command on	CTRL+SHIFT+Z
Replace text	CTRL+H
Save the document	CTRL+S
Save the document with a new name	F12
Select all text in the current document	CTRL+A

# **Shortcut keys for calendars**

This table lists the shortcut keys that you can use in calendars.

To do the following:	Press:
Move to the current day (daily view)	CTRL+HOME
Move to the current month (monthly view)	
Move to the current week (weekly view)	
Move to the next / previous row (weekly and monthly view)	Down Arrow / Up Arrow
Move to the next / previous time increment (daily and work week view)	
Move to the previous / next column (weekly view)	Left Arrow / Right Arrow
Move to the previous / next day (daily and monthly views)	
Move to the previous / next workday (work week view)	
Select a duration for a scheduled activity	SHIFT+Down Arrow / SHIFT+Up Arrow
View the Mini-calendar	F4
View the next day (daily view)	Page Down
View the next month (monthly view)	
View the next week (weekly view)	
View the previous day (daily view)	Page Up
View the previous month (monthly view)	
View the previous week (weekly view)	
View the daily calendar	SHIFT+F5
View the monthly calendar	F5
View the weekly calendar	F3
View the work week calendar	SHIFT+F3

# **Shortcut keys for the Contact Detail window**

Use the following shortcut keys to move between records in the Contact Detail window.

To do the following:	Press:
Display the next contact in the current database	Page Down
Display the previous contact in the current database	Page Up

# **Shortcut keys for the Contact List**

This table lists the shortcut keys that you can use in the Contact List.

To do the following:	Press:
Clear the tag on all contacts	CTRL+SHIFT+F11
Create a lookup selected or tagged contacts	SHIFT+F12
Display the next contact in the current database	CTRL+Page Down
Display the previous contact in the current database	CTRL+Page Up
Remove selected or tagged contacts from a lookup	CTRL+SHIFT+F12
Tag all contacts	SHIFT+F11
Toggle Tag mode on and off	SHIFT+F8

# **Shortcut keys for E-mail windows**

This table lists the shortcut keys that you can use in the ACT! e-mail and New Message windows.

To do the following:	Press:
Check the spelling of selected text	ALT+SHIFT+F7
Check the spelling of the e-mail message	ALT+F7
Close the New Message window	ALT+F4
Copy the selected text	CTRL+C
Create a new e-mail message	CTRL+N
Create a new e-mail message from a template	CTRL+SHIFT+N
Create a new folder	CTRL+SHIFT+E
Cut the selected text	CTRL+X
Delete the selected e-mail message or folder	CTRL+D
Find an e-mail message	CTRL+SHIFT+F
Find and replace text in an e-mail message	F4
Forward the selected or open e-mail message	CTRL+F
Mark the selected e-mail message as read	CTRL+Q
Move the selected message(s) to a folder	CTRL+SHIFT+V
Open the selected saved e-mail message	CTRL+SHIFT+O
Open the selected e-mail message	CTRL+O
Paste the cut or copied text	CTRL+V
Print the selected or open e-mail message	CTRL+P
Rename the selected folder	CTRL+M
Reply to all (addressees) of the selected or open e-mail message	CTRL+SHIFT+R
Reply to the selected or open e-mail message	CTRL+R
Save a message you are writing to the Drafts folder	CTRL+S
Select all messages in the open folder	CTRL+A
Send the selected or open e-mail message (from the New	CTRL+ENTER

Message window)	
Send and receive messages	ALT+C
Undo changes to a new message	CTRL+Z
View the next message in the selected folder	CTRL+Right Arrow
View the previous message in the selected folder	CTRL+Left Arrow

## **Backing up your database**



Only Administrator and Manager Roles are able to back up a database.

# To back up your database using the ACT! Premium for Web Server application

- 1. From the **File** menu, point to **Backup**, and then click **Database**.
- 2. In the **Back Up Database** dialog box, type a path or browse to the folder where you want to create the backup file.
- To avoid overwriting a previous backup, give the backup file a unique name or save it to a different folder.
- 3. (Optional) To protect the backup file from unauthorized access, select **Password protect file**, and then click **OK**.
- 4. If you chose to protect the file, type and confirm a password, and then click **OK**.

### Backing up using other software

If you use backup software to back up ACT! data, remember that an ACT! database is not a single file. You must back up all files associated with the database. You should back up all the files in the Databases folder that begin with the database name, such as *databasename*.adf, *databasename*.alf, *databasename*.pad.

You should also back up the supplemental files that reside in the Databases subfolders such as attachments, templates, and reports.

## **Backing up your personal files**

### To back up your personal files

- 1. From the **File** menu, point to **Backup**, and then click **Personal Files** .
- 2. In the **Back Up Personal Files** dialog box, type a path or browse to the folder where you want to create the backup file.
- To avoid overwriting a previous backup, give the backup file a unique name or save it to a different folder.
- 3. (Optional) To protect the backup file from unauthorized access, select **Password protect file**, and then click **OK**.
- 4. If you chose to protect the file, type and confirm a password, and then click **OK**.

To learn more about database files and personal supplemental files, see <u>Learning</u> more about supplemental files.

### About restoring databases and personal files

The three options for restoring a database are:

- **Restore** This option restores all system files to their original locations on the original computer. This restore option is most commonly used when data is lost or files are corrupted.
- Restore as This option allows you restore the database to a new location and use a different filename. This option is useful when you want to copy a database for another user or move the database to another computer.
   When restoring to a different file name, you must choose a valid database name. See Naming an ACT! database.



If you synchronize data, restoring your database to a location other than the original location breaks the synchronization relationship.

• **Unpack and Restore Remote Database** - This option allows you to unpack and restore a remote database for synchronizing with the main database. The remote database is created on the main database by the administrator, delivered to the remote user/location, and then must be unpacked and restored for synchronization.

You can also restore any personal files that you have backed up. Personal files are not associated with contact records and include files such as personal word-processing documents.

### How do I...?

Restore a database
Restore personal files
Unpack and restore a remote database
Learning more about supplemental files

## **Restoring databases**

### To restore a backup copy of a database



To complete this procedure you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

- 1. From the **File** menu, point to **Restore**, and then click **Database**.
- 2. In the **Restore Database** dialog box, select **Restore**, and then click **OK**.
- 3. In the **Restore database (.zip file)** box, type the path and name of the backup file you want to restore, or click **Browse** to locate it, and then click **OK**.
- 4. If the backup file is protected by a password, type the **Password**, and then click **OK**.
- 5. Type your **User name** and **Password** to log in to the database you want to restore, and then click **OK**.

#### To restore a database to a different filename or to a different location

- 1. From the **File** menu, point to **Restore**, and then click **Database**.
- 2. In the **Restore Database** dialog box, select **Restore as**, and then click **OK**.
- 3. In the **Restore database (.zip file)** box, type the path and name of the backup file you want to restore, or click **Browse** to locate it, and then click **OK**.
- 4. If the backup file is protected by a password, type the **Password**, and then click **OK**.
- 5. In the **New database name** box, type a new name for the restored database. For help, see <u>Naming a database</u>.
- 6. In the **To location** box, type the path or browse to the folder where you want to save the restored database.
- 7. Type your **User name** and **Password** to log in to the database you want to restore, and then click **OK**.

You can also unpack and restore a remote database from this dialog box. See <u>Unpacking and restoring a remote database</u> for more information.

## **Restoring personal files**

### To restore personal files

- 1. From the **File** menu, point to **Restore**, and then click **Personal Files**.
- 2. In the **Restore Personal Files** dialog box, type the path and name of the backup file you want to restore, or **Browse** to locate the backup file, and then click **OK**.
- 3. If the backup file is protected by a password, type the **Password**, and then click **OK**.

## **Unpacking and restoring remote databases**

Before you can begin using a remote database and synchronizing data, you must unpack and restore the remote database.



If an existing database (non-remote) has the same name as the remote database you are unpacking and restoring, you must delete, or move, the existing database prior to restoring the remote database.

### To unpack and restore a remote database

- 1. From the **File** menu, point to **Restore**, and then click **Database**.
- 2. In the **Restore Database** dialog box, select **Unpack and Restore Remote Database**, and then click **OK**.
  - The Unpack and Restore Remote Database dialog box appears. For field definitions, press F1.
- 3. In the **Select the remote database file to restore** field, type the name and location of the remote database you want to restore or click **Browse** to locate the file.
  - The file will have an RDB extension.
- 4. In the **Database Location** field, type the location for the restored database or click **Browse** to select a location.
- 5. To share the remote database with other users, select **Share this database** with other users.
- 6. If you are restoring a database with a password-protected file, type the **Password**, and then click **OK**. The Administrator must provide the password.
  - Once the database is restored, you can open it and begin using ACT!. Then, you can <u>synchronize</u> your data at any time.

### **About database maintenance**

The administrator of a database can perform preventative and corrective maintenance to safeguard data. This becomes extremely important in multi-user environments or when many changes are made to the database.

Preventative maintenance, such as re-indexing data, removing obsolete data, and checking for duplicate records enables your database to run efficiently and improves performance. Some maintenance tasks require all users to sign off so the database can be locked, but those can be scheduled for off-peak hours or even overnight.

Backing up your database and personal files enables you to recover quickly from unexpected system failures by restoring the backup files.

### How do I...?

Check and repair database
Scan for duplicate records
Copying or moving a contact record
Lock the database
Back up the system database
Back up personal files

# **Related topics**

About restoring databases

Tips for maintaining your database

## Tips for maintaining your database

The ACT! Premium for Web Server administrator should monitor the size of all ACT! Premium for Web Server databases and perform routine maintenance on a regular basis to minimize database errors and optimize performance.



To complete the procedures mentioned, you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

### **Basic maintenance**

- Scan for duplicate records and copying or moving a contact record.
- Remove old data.
- <u>Check, repair, and re-index</u> the database.
- Save contact records you rarely use to a different database, and then remove them from the main database. Use Contact Activity lookup to locate records that are used infrequently.
- If you synchronize with remote databases, review and purge your synchronization logs often.

### **Advanced maintenance**

- If your organization uses custom layouts, limit the number of users who can add fields to layouts and pick lists, have them do so responsibly, and delete any fields that are not used.
- Delete outdated templates.
- Decrease the size of unused custom fields. User 1 through User 10 fields are preset to 50 characters in length. If you do not use these fields, reduce the size of them.

## Locking and unlocking databases

An administrator or manager can lock a database to prevent others from accessing data during database maintenance or to improve performance during certain procedures, like generating a large report.

While the database is locked, only the user who locked it and other administrators can access it or unlock it.



To complete this procedure you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To lock a database

- 1. From the **Tools** menu, point to **Database Maintenance**, and then click **Lock/Unlock Database**.
  - The Lock Database dialog box displays users currently logged in. If no users are logged in, the database locks immediately.
- 2. If users are logged in, complete the fields in the **Lock Database** dialog box as needed, and then click **OK**. For field definitions press F1.
  - All logged in users receive a warning message. After the delay period, the system logs everyone out and locks the database.

#### To unlock a database

• From the **Tools** menu, point to **Database Maintenance**, and then click **Lock/Unlock Database**.

## **Checking and repairing databases**

To promote database integrity, the system administrator should run the Check and Repair tool regularly. This process inspects the current database for errors and repairs them. After repairing the errors, it re-indexes the database storage area for maximum efficiency.



This feature does not check and repair personal supplemental files and shared files located on your local drive.

### To check and repair a database

- 1. Make sure the database is locked. See <u>Locking and unlocking a database</u>.
- 2. From the **Tools** menu, point to **Database Maintenance**, and then click **Check and Repair**.
- 3. In the **Check and Repair Database** dialog box, select one or both options (**Integrity Check** and **Re-index**), and then click **OK**.

The message "Working..." appears until the process is complete.

From the dialog box, press F1 for field definitions.

## **Sharing databases**

Sometimes users find it useful to share database information with one another. This is particularly true for teams, where users may be called upon to share the responsibility for certain contacts, companies, meetings, and tasks. Sharing a database is also useful because it allows multiple users to access the same product and services information such as the current pricing structure, volume discount details, and competitor profiles.

### To share the current database with other users on your network

- 1. From the **Tools** menu, point to **Database Maintenance**, and then click **Share Database**.
- 2. A confirmation message appears. Click **OK** to confirm.

## Removing old data

Removing obsolete or old data from a database helps maintain data integrity and improves system performance. The database administrator should perform this task regularly.



To complete this procedure you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To remove old data

- 1. From the **Tools** menu, point to **Database Maintenance**, and then click **Remove Old Data**.
- 2. In the **Remove Old Data** dialog box, select the type and the minimum age of the data (in days) that you want to remove, and then click **OK**.

From the dialog box, press F1 for field definitions.



If your MSDE database is close to the 2 GB limit, it is important for you to remove old data to improve performance.

## **Deleting databases**

If you have a database that you do not use, you should consider deleting it. Removing unused files frees system resources and improves performance.

### To delete a database

- 1. Open the database you want to delete.
- 2. From the **Tools** menu, point to **Database Maintenance**, and then click **Delete Database**.
- 3. In the **Delete Database** dialog box, click **Yes** to confirm the deletion or **No** to cancel.

When a database is deleted, all associated files are also deleted. This includes templates, layouts and all files stored in the Attachments folder.

## **Scanning for duplicate records**

### To scan for duplicate records

- 1. From the **Tools** menu, click **Scan for Duplicates**.
- 2. In the **Scan for Duplicate Contacts** dialog box, from the **Match on** list, select the first field you want to compare when searching for duplicate records.
- 3. (Optional) In the **Then on** boxes, select the second and third fields you want to compare when searching for duplicates.
- 4. Click OK.

If duplicate records are found, a list of possible duplicates opens as a lookup. From this list, you can delete records, keep both records, or, if you have the security level of an Administrator or Manager, you can <u>combine duplicate</u> records. For more information, see <u>About user roles and permissions</u>.

If no duplicate records are found, a message appears stating that no records matched the criteria.



You cannot restore deleted records.

## Copying or moving a contact record

You can copy or move contact data to combine existing contact records or to share information between records.



Only an administrator or manager of a database can combine contact records. See <u>About user roles and permissions</u> for more information.

### To copy or move a contact record

- 1. From the **Tools** menu, click **Copy/Move Contact Data**.
- 2. When the wizard appears, follow the instructions on the screens, clicking **Next** to advance. Press F1 for more help.
- 3. Click **Finish** when done.

After copying and moving data, you have the option to delete any contact records that are not users of your database.

# **Naming databases**

To create a database you can use with ACT!, you must give it a valid name. Follow the guidelines below when naming your database.

A valid ACT! database name:

- cannot begin with a number
- Cannot contain spaces
- •consists of letters, numbers, and the underscore character \_
- •does not exceed 64 characters in length
- cannot contain any special characters
- can include a reserved word, but cannot consist only of the reserved word

## **Creating an empty ACT! database**

### To create an empty ACT! database

- 1. From the **File** menu, click **Save Copy As**.
- 2. In the **Save Copy As** dialog box, in the **Database Name** field, type a name for the new database.
- 3. In the **Database Location** field, you can keep the default location or click **Browse** to select a new location for the database.
- 4. By default, the **Share this database with other users option** is selected. It is recommended that you keep the database shared, but you can click to clear the option.
- 5. In the **Options** box, select **Create an empty copy of the database**, and then click **OK**.
  - The next Save Copy As dialog box helps you select the Administrator user for the empty database.
- 6. In the **Choose Contact** field, you can select an existing contact from the list (this would be a user record), or in the **User Name** field, type a new Administrator user for the database.
- 7. (Optional) Type a password for the user name and type again to confirm.
- 8. Click **OK**.

ACT! creates an empty database containing only the Administrator user information.

## **Copying databases**

### To copy a database

- 1. From the **File** menu, click **Save Copy As**.
  - The Save Copy As dialog box appears.
- 2. In the **Database Name** field, type the name of the new database.
- 3. In the **Database Location** field, type the location where you want to store the database.

or

Click **Browse** to locate a folder.

- 4. (Optional) To create a new folder in which to store the database:
- a. From the **Browse For Folder** dialog box, browse to a location.
- b. Click on the drive letter or folder in which you want to create a new folder. (The drive letter or folder appears highlighted.)
- c. Click **New Folder**, and then type the name of the folder. Click **OK**.
- 5. Click **OK** to copy the database.



If you copy a synchronizing, remote database, you cannot synchronize the copy of the database with the main database.

## Changing the location of personal supplemental files

### To change the location of personal supplemental files

- 1. From the **Tools** menu, click **Preferences**.
- 2. On the **General** tab of the **Preferences** dialog box, select the **File Type** you want to assign a default location, and then click **Browse**.
- 3. Search for a location in which to store your files, and then click **OK**.

## **Learning more about supplemental files**



It is recommended that you understand the concept of <u>creating databases</u> and <u>managing files</u> before reading this topic.

ACT! Premium for Web Server stores two types of supplemental files: database supplemental files and personal supplemental files.

*Database supplemental files* are files associated with a database; they are accessible to users of that database only while it is open. They are automatically created when you create a database.

A default set of *personal supplemental files* are created when you install ACT! Premium for Web Server. These files are not stored with the database, and can therefore be accessed, regardless of the database that the user can access. You can move, copy, and delete personal supplemental files, and you can save a copy of database supplemental files to your personal files folder.

The following table identifies both types of supplemental files. To learn more about them (their attributes, how they are backed up and synchronized, and so on), click the links on the table:

	Included in	
File Type	<u>Database</u> <u>Supplemental</u> <u>Files</u>	Personal Supplemental Files
Layouts	X	
Report templates	X	
Word-processing templates	X	
Label and envelope templates	X	
E-mail		X
E-mail attached to contact records	X	
Internet links		X
Reports		X

Documents		X
Attachments	X	
Queries	X	
Dictionaries		X

### **About users and teams**



If you are converting a database from an earlier version of ACT! and the database has more than one user, see <u>About conversion</u> first.

When you first create a database, you are its only user, however, you can add users and assign them roles that specify the features they can access and the functions they can perform. You can also create teams of users to grant access to contacts.

Each user is assigned his or her own *My Record*, and he or she can set up preferences for how they use ACT! Premium for Web regardless of the role assigned to them.

### How do I...?

Create a user

Edit user information

Make a user inactive

Create a team

Edit team information

## **About user roles and permissions**

ACT! Premium for Web Server includes five user roles: Administrator, Manager, Standard, Restricted, and Browse. Your role determines the features you have access to and the functions you can perform. When you create a new database, ACT! Premium for Web Server automatically assigns you the Administrator role.

Click a role type to review a description of the associated authorities, restrictions, and recommended uses.

- **Browse**
- Restricted
- **Standard**
- •Manager
- •Administrator



See the ACT! Premium for Web Server User's Guide for more information about user roles and permissions.

# **Checking your security level**

### To check your security level

- 1. From the Help menu, click About ACT! Premium for Web Server.
- 2. Click the **Database Info** button.

Your security level is listed in the Database User Information box.

## **Creating users**

You can create a new user from an existing contact record, or add a new user record.

### To create a user

- 1. From the **Tools** menu, click **Manage Users**.
- 2. In the **User Tasks** box, click **Create New User**.
- 3. Follow the instructions on the screens, clicking **Next** to advance. From any screen, press F1 for more help.
- 4. Click Finish.

## **Editing user information**

From the Edit User information screen, you can change the user name, password, and security role for the selected user.

### To edit user information

- 1. From the **Tools** menu, click **Manage Users**.
- 2. From the list of users, select the user you want to edit.
- 3. In the **User Tasks** box, click **Edit User**.
- 4. Follow the instructions on the screens, clicking **Next** to advance. From any screen, press **F1** for more help.

# **Looking up user records**

### To look up user records

• From the **Lookup** menu, point to **Advanced**, and then click **Users**.

All user records appear in the Contact List.

# **Making users inactive**

Making a user inactive means that user will no longer be able to log on to the database. You may want to inactivate a user account for many reasons. If you have a limited number of licenses, you can inactivate one user temporarily to allow access by another. You may also want to temporarily inactivate a user for security reasons, and then reactivate the user at a later time.



To complete this procedure you must have the appropriate permissions assigned to you. For more information, see <u>About user roles and permissions</u>.

#### To make a user inactive

- 1. From the **Tools** menu, click **Manage Users**.
- 2. In the list of users, select a user you want to inactivate.
- 3. In the **User Tasks** box, click **Edit User**.
- 4. Click **Next** to advance to the **Specify Access** screen, and then under **Logon Access**, select **Inactive**.
- 5. Click Finish.



Inactive users cannot log on to the database; however, they can still own data including contacts and activities.

#### To make a user active

- 1. From the **Tools** menu, click **Manage Users**.
- 2. In the list of users, select a user you want to reactivate.
- 3. In the **User Tasks** box, click **Edit User**.
- 4. Click **Next** to advance to the **Specify Access** screen, and then under **Logon Access**, select **Active**.
- 5. Click Finish.

# **Deleting users**

When a user leaves the company or moves to a position that does not require access to a database, you should remove the user account from the database. Doing so protects the database from unauthorized access, but also deletes the obsolete user data and frees a license for use by someone else. All records associated with this user should be reassigned. Private data will be deleted.

#### To delete a user

- 1. From the **Tools** menu, click **Manage Users**.
- 2. Select the user you want to delete, and then click **Delete User** from the **User Tasks** box.
  - If the user has contacts or activities assigned to him or her, the Delete User dialog box opens.
- 3. From the **Delete User** dialog box, select a **User record option** to define how you want to handle the user's activities and contacts. Press F1 for more help.
- 4. Click **OK**, and then click **Yes** to confirm deletion.

# **Creating teams**

#### To create a team

- 1. From the **Tools** menu, click **Manage Teams**.
- 2. In the **Team Tasks** box, click **Create Team**.
- 3. Follow the instructions on the screen, clicking **Next** to advance. Press F1 for more help.
- 4. Click **Finish** when done.
- J

You can create "empty" Teams. The Team name is the only required field.

#### To add a member to a Team

- 1. From the **Enter Team Information** screen, you can add a single or multiple members.
- To add one or more Team members, select a user in the Available users list, and then click the right arrow to add the user to the Include these users in team list.
- To add all available users to the Team, click the double-right arrow button.
- 2. Click Finish.

# **Editing team information**

You can edit the Team name, Team description, and Team Membership from the Enter Team Information screen.

### To edit team information

- 1. From the **Tools** menu, click **Manage Teams**.
- 2. In the **Team Tasks** box, click **Edit Team**.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press F1 for more help.
- 4. Click Finish.

# **Deleting teams**

### To delete a team

- 1. From the **Tools** menu, click **Manage Teams**.
- 2. Select the team that you want to delete, and then click **Delete Team** from the **Team Tasks** box.
- 3. Click **Yes** to confirm the deletion.

# **About synchronizing databases**

With ACT! Premium for Web Server, users may share data by using a common, or main, database to maintain contact, group, and company information. Often, users in different locations share data. The process of allowing multiple copies of the same data to exist in different places at the same time is called *synchronization*. Synchronization tracks changes to data in multiple places and transports the change from one database to another.

A remote location requires a remote database of the contact, group, and company information contained in the main database. A remote database can have all the data, or a subset of the data, contained in the main database.

You synchronize data between a main database and one or more remote databases. For an example of two synchronization models, see "Synchronization models" in the ACT! Premium for Web Server User's Guide. These models represent two possible synchronization scenarios for a company.

Synchronization requires a connection between the main database and remote database(s). ACT! Premium for Web Server synchronization has been designed as a background process that will allow for normal use of the database to continue during synchronization.

Before planning for and setting up synchronization, see "Planning for synchronization," in the ACT! Premium for Web Server User's Guide.

If you are using a previous version of ACT! and synchronize, you should synchronize data into one database. Then, after installing the ACT! Premium for Web Server, you can <u>convert the database</u>, and create new remote databases.



- •You cannot synchronize between products. The main and remote database(s) must be running the same ACT! Premium for Web Server product.
- For more information about folder sharing rights and network security related to synchronization, refer to your operating system's documentation.

# How do I...?

Set up synchronization Synchronize data

# **Related topics**

Understanding the synchronization process
Understanding Sync Sets
Understanding the Subscription List
Tips for successful synchronization

# **Security and synchronization**

The following describes the synchronization functions that users of a main database and remote database can or cannot perform. If you are an Administrator or Manager user, you should be familiar with the security permissions for each user's role before you set up synchronization. For more information, see <u>About user roles and permissions</u>.

### Main database

The following applies to the main database and users of the main database.

- •Users with Administrator or Manager roles can set up synchronization.
- Remote databases are created, disabled, and re-recreated on a main database.
- Schema changes, such as defining fields, can be made.
- Users with Administrator or Manager roles can define and modify Sync Sets and Subscription Lists for any remote database.
- •Users with Administrator or Manager roles can print synchronization settings for any remote database.

### Remote database

The following applies to remote databases and users of remote databases.

- Remote databases cannot create other remote databases.
- Synchronization is initiated by Standard users and above.
- Users with an Administrator or Manager role can create and modify Sync Sets. However, only the main database can create a remote database using the Sync Sets created on the remote database.
- Users with a Standard and above role can modify the Subscription List for a remote database they belong to.
- Users with a Standard and above role can modify synchronization schedules and print synchronization settings for the remote database they belong to.
- Customizations, such as adding fields and activity types, cannot be made.
- Scheduling resources is not available in a remote database, but scheduled resources in activities are displayed in a remote database.

# **Understanding the synchronization process**

The following task lists describe the processes of setting up synchronization and synchronizing data. Good planning is essential to setting up synchronization correctly. You should read "Planning for synchronization" in the ACT! User's Guide before <a href="mailto:setting-up-synchronization">setting-up-synchronization</a>.

### Administrator tasks - Main database

- 1. Enable synchronization
- 2. Define a Sync Set
- 3. Create remote database
- 4. Deliver remote database
- 5. Turn on synchronization
- **6. Set up Internet synchronization**
- 7. Set up the ACT! Network synchronization service

### **User tasks - Remote database**

- 1. Unpack and restore the remote database
- 2. Synchronize data
- 3. Set up a sync schedule (optional)
- 4. Get more contacts (optional)

# Tips for a successful synchronization

The following tips help ensure that data synchronization runs smoothly:

- Plan for synchronization before setting up synchronization. See the ACT! User's Guide for more information.
- All users of ACT! databases who wish to synchronize must be on the same version and should have installed the latest update of their version of ACT!. To see the version of ACT! you are using, from the Help menu, click About ACT!. To update your version of ACT!, select ACT! Update from the Help menu.
- •To ensure consistency, develop a business rule to determine how contact information should be entered, such as using abbreviations in company or contact names. This will reduce duplicate contact records when you synchronize.
- Remove or consolidate duplicate records before synchronizing.

# **Setting up synchronization**

The most important part of a successful synchronization is planning. Before you set up synchronization, you should read "Planning for synchronization" in the ACT! User's Guide.



You must be the Administrator or Manager user of a main database to set up synchronization.

### To set up synchronization

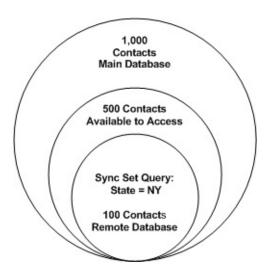
- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. Under **Admin Tasks**, click **1. Enable Synchronization**, and then click **Yes** to confirm enabling synchronization.
  - Once enabled, the other tasks will be available on the panel.
- 3. Under **Admin Tasks**, click **2. Manage Sync Set**.
- a. In the **Sync Sets** box, click <u>Create New Sync Set</u>.
- b. Follow the instructions on the screens, clicking **Next** to advance. For more help, press **F1**.
- c. If you selected to **Define Sync Set criteria**, then in the **Sync Set Criteria Tasks** box, click **Create Criteria** and follow the instructions for <u>selecting criteria for a Sync Set</u>.
- d. Click **Finish**.
  - You can add as many Sync Sets as you need before creating a remote database.
- 4. When you finish setting up Sync Sets, click **Home**, and then under **Admin Tasks**, click **3. Create Remote Database**.
- a. Follow the instructions on the screens, clicking **Next** to advance. For more help, press **F1**.
- b. Click **Finish**.
- 5. Deliver the remote database to remote users.
- 6. <u>Turn on synchronization for the main database</u> to allow the main database to accept incoming synchronizations.
- 7. (Optional) Set up Internet synchronization.
- 8. (Optional) Set up the ACT! Internet synchronization service.

# **Understanding Sync Sets**

- Sync Sets are the basis for including data in a remote database upon creation and represent a starting point or data baseline for the remote database.
- A Sync Set will only include all contact records that users of the designated Sync Set can access given their permission.
- When an Administrator or Manager user creates a Sync Set, he or she also can create a query that further defines the records included in the Sync Set.
- An Administrator or Manager user can copy, edit, or delete Sync Sets.
- Sync Sets may be shared by one or many remote databases. When Sync Sets are shared, any changes to the Sync Set will be reflected in all remote databases sharing that Sync Set.
- Each remote database will use only one Sync Set.
- Users are not restricted to receiving only those contact records defined in the Sync Set. By using a <u>Subscription List</u>, or by modifying the Sync Set definition, users can add more records to their remote database from the main database.

The following scenario and diagram describe how Sync Sets work.

You are the Administrator user of a main database that contains 1,000 contact records. You have five users for whom you want to create a remote database. Due to the users' permissions (roles), only 500 of the 1000 contact records in the main database are available for them to access (the other 500 records may be private or have limited access). Because your users work only with contacts in New York, you define the Sync Set with a query that includes only contacts in the state of New York. If only 100 out of the 500 contacts reside in New York, your users will receive a database with those 100 contact records.



# **Enabling synchronization on the main database**

For a main database to be active and allow for the creation of remote databases, the database must be enabled. Enabling activates the other synchronization tasks.

### To enable synchronization of a main database

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **1. Enable Synchronization**.
- 3. Click **Yes** to confirm enabling synchronization.

### **Creating Sync Sets**

If you plan to synchronize, you need to create a Sync Set of the contact records that belong in the remote database. You can create a Sync Set on a remote database, too. After the remote database synchronizes, the new Sync Set information is present on the main database and can be used in the creation of a remote database.

### To create a Sync Set

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **2. Manage Sync Set**. The Create, Copy, Edit, or Delete Sync Sets screen appears.
- 3. In the **Sync Set Tasks** box, click **Create New Sync Set**.
- 4. In the **Enter Sync Set Name and Description** screen, type a name and description, and then click **Next**.
- 5. Follow the instructions on each screen to select users and contact records. Click **Next** to advance until you reach the Sync Set Confirmation screen, and then click **Finish**. Press **F1** for more help.

For more information, see <u>Selecting criteria for a Sync Set</u>.

# **Selecting criteria for Sync Sets**

You can use the Sync Set Criteria dialog box to select the criteria for a Sync Set. From this dialog box, you select contact fields, operators, field values, and define the And/Or settings for building the query that selects the contact records to be included in the Sync Set.

In addition to creating a new query, you can open an existing query and save a query.

### To select criteria for a Sync Set

- 1. From the **Select Contacts** screen, click **Define Sync Set Criteria**, and then click **Next**.
- 2. From the **Create or Edit Sync Set Criteria** screen, click **Create Criteria**.



If you want to use an existing query, click the Open tool and select the saved query. The query criteria details load into the screen. You can make changes to the criteria.

- 3. From the **Sync Set Criteria** screen, the **Type** field is set to **Contact**, so in the **Field Name** field, select one of the available contact fields.
- 4. In the **Operator** field, select one of the available items, such as Contains or Equal To (=).
- 5. In the **Value** field, select one of the available items that correspond to the selected Field Name item.
- 6. Click **Add to list**.

The query criteria appears in the columns in the middle pane of the dialog box.

- 7. Click **Preview** to see the contacts in the lower pane and total number of records that are included in the Sync Set.
- 8. (Optional)To remove the criteria and start over, click **Remove**.
- 9. (Optional)To select more than one criteria for a Sync Set, follow steps 3 through 7 again, and use the And/Or column to build the query. To change the And/Or setting, in the middle pane of the dialog box, click in the **And/Or** column for the item and select from the list.
- 10. When you finish selecting criteria, you can do the following:
  - To save the query, click the **Save** tool and give the query a name. Queries are saved in the Queries folder and have an .qry extension.

• To continue, click **OK**.

### **Creating remote databases**

A remote database is created on a main database by a user with an Administrator or Manager role. You must <u>create a Sync Set</u> before you can create a remote database.

Creating a remote database requires the Administrator or Manager to give the database a unique name, assign a Sync Set for the contents, set an expiration period and options for attachments and supplemental files to synchronize, set the connection type, and build the remote database.

#### To create a remote database

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **3. Create Remote Database**.
- 3. Follow the instructions on the screens, clicking **Next** to advance. Press **F1** for more help.
- 4. Click **Finish** to create the remote database.

The remote database file is created and has an .rdb extension. You <u>deliver this</u> <u>file to your remote users/locations</u>.

### **Delivering remote databases**

When you deliver a remote database, you must instruct the user on how to install, or unpack and restore, a remote database before using it. If a database file is password protected, you must provide the password. You can use the following paragraphs as a sample message on how to instruct the user, or you can cut and paste this message into an e-mail, readme file, or other documentation when you deliver a remote database:

The attached file contains an ACT! database with an .rdb extension. To install the database, please save this file to your local drive (make a note of the location where you save it), and then follow the instructions in ACT! Help for "Unpacking and restoring a remote database."

NOTE: This file is not password protected. You do not require a password to install this database.

or

#### To deliver a remote database

- 1. After creating a remote database, locate it in the directory where you stored it.
- 2. To deliver the remote database, place it in a shared folder, copy it to a CD, or place it on your FTP site.
- 3. Tell your users how to install the database by sending them a message like the one described above.

# **Setting up Internet synchronization**

The Internet synchronization set up requires a computer with Microsoft Internet Information Services (IIS) v 5.0.2 or higher and ASP.NET (if using Windows 2003) installed. The IIS computer should be located outside the firewall.

The SyncConfigFile.xml file, found in the ActInternetSync directory, needs to be modified for the specific main database and database machine.

#### To set up Internet synchronization on the IIS machine

- 1. Browse to the location of the **ActInternetSync** directory and double-click the **SyncConfigFile.xml** file to open it.
- 2. In the **DATABASE NAME** field, delete "MYDATABASE" and type the specific database name. Be sure to enclose the name in double quotes.
- 3. In the **MACHINE** field, delete "Machine1" and type the specific machine name of the computer hosting the main database. Be sure to enclose the name in double quotes.
- 4. Save the changes and close the file.
- 5. Stop and restart the IIS service.

### To set up the ACT! Network synchronization service

- 1. Click **Start**, point to **Programs**, point to **ACT! Network Sync Service**, and then click **ACT! Network Sync**.
- 2. In the **ACT! Premium for Web Network Sync Service** dialog box, click **Add**.
- 3. In the **Sync Database** dialog box, in the **Database Machine** field, type the name of the computer hosting the main database, or click **Browse** to locate the hosting computer.
- 4. In the **Database Name** field, type the name of the main database, and then click **OK**.
- 5. In the **Monitor Port** field, type the port number.
- 6. Click **Start Sync Service** to manually start the service.
- 7. Minimize the window.

The service will restart whenever you reboot the machine. With ACT! Premium for Web Network synchronization service running, an icon displays in the system tray. You can right-click the task bar icon and select Show/Hide.

# **Setting the expiration period**

When you create a remote database, you set the number of days before synchronization will expire. A user of a remote database must synchronize within the time specified, or he or she will no longer be able to synchronize data. This ensures that changes made on remote databases are synchronized in a timely manner and prevents the transaction log from becoming overloaded and inefficient. Once expired, the remote database cannot synchronize to the main database. To resume synchronization, the Administrator or Manager user of the main database must create a new remote database for the user(s).



You set the expiration time when you create the remote database; you cannot change it later.

You can set synchronization to expire between 2 and 90 days.

#### To set the expiration period for a remote database

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. On the panel, click **3. Create Remote Database**.
- 3. Follow the instructions on the screen to name the database and select a Sync Set.
- 4. Specify the number of days before expiration expires in the **Set the number of days that synchronize expires** field. ACT! Premium for Web Server sets a default value of 30 days. You can type a number between 2 and 90 days.

# **Setting up automatic synchronization**

If you are a Standard or above user on a remote database, you can set a schedule to automatically synchronize to the main database. You can also set a start date and start time for the automatic synchronization to begin.

### To set up automatic synchronization

- 1. On the remote database, from the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Set Sync Schedule**.
- 3. In the **Sync Schedule** screen, in the **Occurs** box, do the following:
- a. Select one of the schedule options. By default, **None** is selected.
- b. Complete the additional options for the selected scheduling item.
- 4. In the **Occurs At** box, do the following:
- a. In the **Start Date** field, select a date to start the automatic synchronization. The current date appears by default, but you can select another date.
- b. In the **Start Time** field, select or type a time to start the automatic synchronization. The current time appears by default, but you can change the time for any option except Hourly.
- 5. Click Finish.

# Re-creating a remote database

If you are an Administrator or Manager user for a main database, you can recreate a remote database. You may need to do this if a remote database synchronization period has expired, or if you disabled the remote database.

#### To re-create a remote database

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Manage Database**.
- 3. Select the remote database you want to re-create, and then in the **Admin Tasks** box, click **Recreate Database**.
- 4. Click **Yes** at the confirm message prompt.
- 5. In the **Recreate Database** dialog box, in the **Database Location** field, type a location or click **Browse** to specify a location to store the database.
- a. (Optional) If you want the database file to be password protected, click
   File is password protected, type a password in the Password field, and then type the password again in the Confirm Password field.
- b. Click **OK**.
  - The Database Recreation in Progress screen appears. The process will take a few minutes. If necessary, you can click Cancel to stop the recreation process.
- 6. At the Recreation successful message, click **OK**. The re-created database appears in the list with a Status of Active.
- 7. Select another database to recreate, or click **Home**.

# **Editing Sync Sets**

If you are an Administrator or Manager user, you can edit a Sync Set if you need to change the name or description. You can also edit the criteria definition for a Sync Set.

### To edit a Sync Set

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **2. Manage Sync Set**. The Create, Copy, Edit, or Delete Sync Sets screen appears.
- 3. From the list, select the Sync Set, and then click **Edit Sync Set** in the **Sync Set** Tasks box.
- 4. Follow the instructions on the screens, clicking **Next** to advance. For more help, press **F1** on any screen.
- 5. Click **Finish**.

#### To edit a Sync Set's criteria definition

- 1. Follow steps 1 through 3 in the previous procedure.
- 2. Click **Next** until you reach the **Enter Sync Set Criteria** screen.
- 3. Select a Sync Set to edit, and then click **Edit Criteria**.
- 4. In the **Sync Set Criteria** dialog box, do one of the following:
- To edit a query, select the query and make changes as needed.
- To remove a query, select the query, and then click **Remove**. To remove all queries, click **Remove All**.
- To sort queries, select a query, and then click **Move Up** or **Move Down**.

# **Copying Sync Sets**

You can copy a Sync Set to quickly create a new Sync Set with similar synchronization options.

### To copy a Sync Set

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **2. Manage Sync Set**. The Create, Copy, Edit, or Delete Sync Sets screen appears.
- 3. From the list, select the Sync Set to be copied, and then click **Copy Sync Set** in the **Sync Set Tasks** box.
  - The Enter Sync Set Name and Description screen appears.
- 4. Type a new name and description for the Sync Set, and then click **Next**.
- 5. If you do not want to change any of the synchronization options, click **Next** on each screen until you reach the **Sync Set Confirmation** screen, and then click **Finish.**

#### or

If you do want to change remote users or contact records for the new Sync Set, follow the instructions on each screen. Press  ${\bf F1}$  for more help.

# **Deleting Sync Sets**

You can delete a Sync Set that meets either of these two conditions:

- •The Sync Set is not assigned to a database that is in use.
- •The Sync Set is not assigned to a disabled database with the option to transfer data one last time.

### To delete a Sync Set

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **Admin Tasks** box, click **2. Manage Sync Set**. The Create, Copy, Edit, or Delete Sync Sets screen appears.
- 3. Select a Sync Set to delete, click **Delete Sync Set** in the **Sync Set Tasks** box, and then click **Yes** to confirm your selection.

# **Looking up Sync Sets**

From the main database, you can display contact records included in the Sync Set. The lookup includes public records added to a Sync Set using the subscription list and all contact records to which the user performing the lookup has access.

### To look up a Sync Set

- 1. From the **Lookup** menu, point to **Advanced**, and then click **Sync Set**.
- 2. In the **Lookup Sync Set by database** dialog box, select the database for the Sync Set you want to display, and then click **Lookup**.
  - The Contact List displays the search results.

# Disabling (or stopping) synchronization

You can disable, or stop, synchronization on a main or remote database. From the main database, there are two ways for an Administrator or Manager user to disable synchronization:

- You can disable synchronization for a remote database and allow one last synchronization before the remote database is disabled. The remote database will receive a notification statement in the synchronization log that synchronization has been disabled and one last synchronization session will occur. Once you disable a remote database, you cannot enable it to synchronize again. You must re-create the database.
- You can disable synchronization on the main database. To do this, you must first disable all active remote databases.

From the remote database, an Administrator or Manager user can disable the remote database so that it no longer synchronizes to the main database. Once a remote database has been disabled for synchronization, it is no longer a remote database. If you subsequently enable synchronization on this database, it will now be a host or main database with all the synchronization tasks of a main database.

To disable synchronization for a remote database and allow one last synchronization

To disable synchronization on the main database

To disable synchronization on the remote database

# Turning on/off synchronization for the main database

An Administrator or Manager user of a main database must turn on the Sync Server to receive the synchronization data from a remote database(s). Even though synchronization is initiated from the remote database, the main database must be set to listen for communications to receive synchronization data from a remote database. Once the main database has been set to listen for incoming synchronizations, it will remain on unless an Administrator or Manager user turns it off.

### To turn synchronization for the main database

- 1. From the main database, click **Tools**, point to **Synchronize**, and then click **Accept incoming syncs**.
- 2. In the **Sync Server Port** dialog box, the default port number of 65100 appears. If you want to use a different port number, type it, and then click **OK**.

A progress bar appears.

3. At the **Server successfully started** message, click **OK**. A check mark before Accept incoming syncs indicates that synchronization is turned on.

### To turn off synchronization for the main database

- 1. Click **Tools**, point to **Synchronize**, and then point to **Accept incoming syncs**.
- 2. At the **Sync Server stopped** message, click **OK**.

# **Stopping and restarting the ACT! Network Sync Service**

You can stop and restart the ACT! Network Sync Service if you need to add a database.

### To stop and restart the ACT! Network Sync Service

- 1. Click **Start**, point to **Settings**, point to **Control Panel**, **Administrative Tools**, and then click **Services**.
- 2. Select the **ACT! Network Sync Service**.
- 3. On the toolbar, click the **Stop Service** tool.
- 4. To restart the service, click the **Restart Service** tool.

# Viewing the synchronization log

You can view the synchronization log for the main and remote databases. This log includes the details and error logging of the synchronization sessions between the Sync Server and remote databases. You can use the synchronization log to verify synchronization and ensure items sent and items received are being updated.



Purging of the synchronization log is tied to the longest expiration period set for a remote database. For example, on a remote database, if the expiration period is 30 days, ACT! will maintain synchronization log entries for 31 days. After that time, older entries will be purged when maintenance is performed on the database.

## To view the synchronization log

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **View Sync Log**.
- 3. If you would like to print the details, you can right-click in the grid to Select All or Copy the synchronization log details and paste them into a file.

# Looking up last data synchronized

From the main database, you can apply filters to look up the contact records that synchronized with each remote database. From a remote database, you can apply filters to look up the contact records that were last modified via synchronization with the main database.

### To look up last data that was synchronized

- 1. From the **Lookup** menu, point to **Advanced**, and then click **Last Synchronized**.
- 2. From the **Last Synchronized** dialog box, select either **Last Session** or **Date Range**. If you selected Date Range, in the **From** and **To** fields, enter the dates.
- 3. In the **Search these records** area, select a **Record Type** and **Database**. Default settings for these fields differ for the remote and main databases.
- 4. In the **Look in** area, all options are selected by default; click an option to remove it from the search.
- 5. Click **Find Now**.

The details of the contact records that last synchronized are displayed in the lower pane of the dialog box.

- 6. Do one of the following:
- To create a lookup of the last data, click **Create Lookup**.
- To clear all fields and create a new search, click New Search.
- To close the dialog box, click **Close**.

# Viewing and printing synchronization settings

You can view the synchronization settings for each remote database and then print the setting information.

## To view and print synchronization settings

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Manage Database**.
- 3. In the **Select a Database** screen, select the remote database you want to view.
- 4. In the **User Tasks** box, click **View Settings**.

  The Sync Settings screen appears with the selected database's settings.
- 5. To print the settings, under **Print Tasks**, click **Print**.
- 6. When printing is completed, click **Finish**.

# **Viewing the Sync Set query**

When adding records to a Sync Set via the Subscription List, you can view the query criteria for the existing Sync Set.



If the Sync Set was created using all contact records instead of selecting criteria for the Sync Set, then no query information will appear.

## To view the Sync Set query

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Manage Subscription List**.
- 3. In the **Subscription Tasks** box, click **View Sync Set Query**. The query criteria of Field Type, Field Name, Operator, Value and And/Or settings appears.
- 4. When you are finished, click **Home** to return to the Synchronization Panel.

# **Synchronizing data**

A remote database user initiates synchronization with a main database. You can synchronize your data as often as you like or you can set a sync schedule to <u>automatically synchronize</u> at a specified time, such as hourly, daily, weekly, or monthly.



You can continue using your database during synchronization; however, any information that you change is not reflected in the main and remote databases until the next time you synchronize.

## To synchronize data

• On a remote database, from the **Tools** menu, point to **Synchronize**, and then click **Synchronize Now**.

When you synchronize, contact records from the main database are included in your remote database as defined by the Sync Set the Administrator or Manager user created. You can <u>use the Subscription List to add more contacts to your database</u> than those included in the Sync Set.

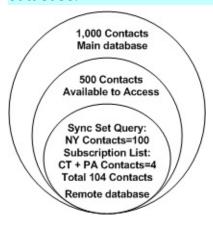
# **Understanding the Subscription List**

- Depending on how the Administrator user defines the Sync Set, remote users may receive only a portion of the contact records they are allowed to access. Using the Subscription List, a Standard user and above on a remote database can add more contact records to the Sync Set.
- The contacts added to the Subscription List will always synchronize unless removed from the Subscription List or the records are deleted.
- The Subscription List is fixed, or *static*. To ensure that a contact record remains in the remote database and always synchronizes, it is a good idea to add it using the Subscription List, even though the record is included in the Sync Set. Then, if the Administrator removes the record from the Sync Set, or if the contact no longer fits the Sync Set query definition, it will not be removed from the remote database.

The following scenario and diagram describe how Sync Sets and the Subscription List work.

Your main database contains 1,000 contact records. You are a remote user. Your role permission gives you access to only 500 of the 1000 contact records in the main database. Because you work mostly with contacts in New York, the Administrator user creates a Sync Set called "New York," which includes only contact records with a New York state address. Only 100 contacts reside in New York, so you will receive a remote database with only those 100 contact records.

However, you also work with two contacts in Connecticut and two contacts in Pennsylvania. You can use the Subscription List to add those records to your "New York" Sync Set (as long as you have permission to access those records). When you add them to your Sync Set, you will have 104 contact records in your database.



## **Using the Subscription List to add contact records**

If you are a user with a Standard or above role, you can use the Subscription List to add more contact records to an assigned Sync Set. For more information, see <u>Understanding the subscription list</u>.



An Administrator or Manager user may add contacts by using the Subscription List or by <u>modifying the query definition for the Sync</u> Set.

## To use the Subscription List to add contact records

- 1. From the **Tools** menu, click **Synchronization Panel**. The Synchronization screen appears.
- 2. In the **User Tasks** box, click **Manage Subscription List**.
- 3. Select the Sync Set you want to add contact records to, and then click **Next**.



Users on a remote database will not see the screen to select a Sync Set. They can only access their Sync Set.

The Manage Subscription List screen appears, and contact records that are included in the Sync Set are indicated by a check mark in the Sync Set column.

- 4. In the **Subscription Tasks** box, click **Add Contacts to Sync Set**.
- 5. In the **Contacts** dialog box, select the contact(s) from the list on the left, and then click the right arrow button to add them.
- 6. (Optional) You can remove contact records by selecting a contact in the **Selected Contacts** list, and then clicking the left arrow button.
  - You can only remove contacts that have been added by the Manage Subscription List.
- 7. When you are finished, click **OK**, and then click **Finish**. The additional contact records will appear in your database after your next synchronization.

# **Resetting the Subscription List**

At some point, you may need to reset the Subscription List for a Sync Set back to its original contact records. This will cause the Sync Set to only include those contact records meeting the criteria of the Sync Set definition.

## To reset the Subscription List

- 1. From the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Manage Subscription List**.
- 3. Select the Sync Set you want to reset, and then click **Next**. The Manage Subscription List screen appears.
- 4. In the **Subscription Tasks** box, click **Reset subscription list**, and then click **Yes** to confirm your selection.

The Subscription List is replaced by the original Sync Set, as defined by the Administrator user.

# **Managing the Sync Server connection information**

An Administrator or Manager user for a remote database may need to change the information if the server is not detected by the remote database, or if the port number of the Sync Server was changed.

#### To manage the Sync Server connection information

- 1. On the remote database, from the **Tools** menu, click **Synchronization Panel**.
- 2. In the **User Tasks** box, click **Manage Connection Information**.
- 3. In the **Sync Server Connection** screen, do one or more of the following:
  - To change the machine name, in the Enter Machine Name of the computer hosting the Main database field, type the name of the machine.
- To change the port number, in the Enter the Port number being monitored by the sync server field, type the port number.
- To change the connection type, select one of the options. If selecting
   Internet connection type, in the Enter the URL or IP address field, type
   the information.
- If you have selected both Internet and Network connection types for a remote database, select the **Prompt me for which address to use each time I synchronize manually** option.
- 4. When all changes are complete, click **Finish**. For more help, press **F1**.

# **Troubleshooting synchronization**

## What do you need help with?

After synchronizing, some activities do not display in my calendar.

Can a remote database create other remote databases?

I want to add records to my Sync Set

Files or attachments did not synchronize

I cannot unpack or restore a recreated remote database

Contact records did not synchronize

# To select more than one name or item

Press SHIFT+click to select multiple names or items that are adjacent. Press CTRL+click to select multiple names or items that are not adjacent.

# **Customizing field entry order in layouts**

On any window, you can use the TAB key to move through fields sequentially or use the ENTER key to move between the most commonly used fields. ACT! provides default field entry orders, but you can customize, clear, or add Enter Stops and Tab Stops to make data entry more efficient.

#### To assign a Tab Stop to a field

- 1. <u>Display the Tab Stops or Enter Stops.</u>
- 2. Locate the field you want to assign the Tab or Enter Stop to, and then click the field.

The next available number in the Tab or Enter Stop order is assigned to the field.

## To switch the Tab Stop or Enter Stop order for fields in a layout

- 1. Display the Tab Stops or Enter Stops.
- 2. Click the first field to clear the number from the field.
- 3. In the field that you want to switch with the first field, click that field, and then click it again (do not double-click) to assign the first field's number to the second field.
- 4. Click the first field to complete the switch.
  - For example, to switch field orders 6 and 8, first click number 6. Then, click number 8 two times (without double-clicking). Then, click the empty field (where number 6 was).

Tab Stops and Enter Stops are chronologically numbered with the next consecutive and free number. That is, when you click a field to set a Stop, the number assigned to it is the next consecutive number available on the layout. For example, if you set Stops 0 through 10 and 15 through 30, the next time you click a field, the number assigned to the Stop will be "11."

## To set a specific number for a Tab Stop or Enter Stop in a layout

- 1. <u>Display the Tab Stops or Enter Stops.</u>
- 2. Point to the field you want to change, and then right-click.
- 3. In the **Set Index** dialog box, type the number you want to use for the Stop.
- You cannot assign a number that is already in use on the layout.

# **Creating and sending cover pages**

ACT! helps you create a cover page quickly by retrieving the recipient name, fax, and phone information from the contact record.



If your fax software has a cover page option, turn it off to prevent sending an additional cover page. For more information, see your fax product documentation.

## To create and fax a cover page

- 1. Display a contact record.
- 2. From the Write menu, click Fax Cover Page.
  - ACT! merges the current contact name, phone, and fax number into the fax cover page template.
- 3. Change the cover page heading as needed, and then type any additional content.
- 4. From the **File** menu, click **Print**.
  - The **Print** dialog box opens.
- 5. In the printer **Name** box, select the name of your fax software, and then click **OK**.
  - Your fax software may or may not display additional dialog boxes to complete the fax process. For further information, refer to your fax software documentation.
  - After sending the fax, ACT! displays the Create History dialog box.
- 6. If you want to record the fax transmission in the contact's history, select **Yes, record history**.
- If you want to include a reference note, type it in the **Regarding** box.
- If you want to save the fax document in the contact history, select **Attach**document to history.
  - 7. Click **OK**.

# Checking spelling in the Contact, Group, or Company Detail view fields

## To check the spelling in the Contact, Group, or Company Detail view fields

- 1. Display the contact, group, or company detail view to be spell checked.
- 2. From the **Tools** menu, click **Spelling**.

  The Spell Checking dialog box appears. For field definitions, press F1.
- 3. If the Spell Check finds an unrecognized word, a replacement word appears in the **Replace with** field. Do one of the following:
  - To replace the word with the one in the **Replace with** field, or with one of the suggested words in the **Suggestions** box, select an alternate word, and then click **Replace**.
- To do nothing, click **Skip**.
- To add the unrecognized word to the custom user dictionary, click **Add**.
- To cancel the spelling check, click **Cancel**.
- 4. Repeat step 3 until the **Spelling Check Status** message appears and indicates that the check is complete.

# Disabling the virus protection error message

## To disable the virus protection error message

- 1. Open Microsoft Outlook Express 6.
- 2. From the **Tools** menu, click **Options**, and then click the **Security** tab.
- 3. In the **Virus Protection** box, clear the **Warn me when other applications try to send mail as me** box.

For more information, see Microsoft Outlook's online Help.

# **Sorting records**

You can sort contact, group, or company records from the list views or detail views. Several sort methods are available.

#### To sort records from the list view

• Click a column heading to sort the column in ascending or descending order.

#### To sort records from the list view or detail view

- 1. From the **Edit** menu, select **Sort**.
- 2. In the **Sort** dialog box, in the **Sort by** field, select a field, and then select whether to sort in ascending or descending order.
- 3. To sort by additional fields, complete the remaining fields, and then click **OK.**

# Adding and removing a report section

### To add a report section to a report template

- 1. Create or modify a report template.
  - The report appears in the Report Designer.
- 2. Double-click any header to display the **Define Sections** dialog box. For field definitions, press **F1**. For information about report sections, see <u>Understanding sections in report templates</u>.
- 3. Add a section.
- 4. Define the sorting behavior for the section.
- 5. Click **OK**.

The section appears on the layout designer.

#### To remove a section from a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Double-click any header to display the **Define Sections** dialog box. For field definitions, press **F1**. For information about report sections, see <u>Understanding sections in report templates</u>.
- 3. From the list of sections, select the section you want to remove, and then click **Remove**.
- 4. Click **Yes** to confirm the deletion, and then click **OK**.
- You cannot delete or change the order of the five default sections: Report Header, Page Header, Detail, Page Footer, and Report Footer.

The section and its corresponding header and footer are removed.

# **Adding subreports to report templates**

## To add a subreport to a report template

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. In the **Toolbox**, click the **Subreport** tool.
- 3. Position the cross-hair pointer on the template where you want to insert the subreport, and then click and drag the mouse to define the subreport's size. When you release the mouse button, the Subreports dialog box appears. For field definitions, press F1.
- 4. Type the name of the subreport in the **Subreport name** field.
- 5. From the **Select the field that will link** list, select the field that links the main report to the subreport, and then click **OK**. Depending on the type of report being created, this is usually the contact, group, company, or opportunity name.

# **Hiding sections in report templates**

## To hide a section in a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Click the section you want to hide.
- If the Properties window is not visible, from the View menu, click Properties Window.
- 3. From the **Visible** list in the **Properties Window**, select **No**. The section appears with shading through it.

# **Setting options for sections in report templates**

You can set the Section Behavior options for each of the five default sections (Report Header, Page Header, Detail, Page Footer, and Report Footer), or you can set a sorting option for a section that you added. You set the options for the five default sections one section at a time. For more information about sections, see <u>Understanding sections</u> in report templates. For more information about adding a section, see <u>Adding and removing a report section</u>.

## To set options for a default section

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Double-click any header to display the **Define Sections** dialog box. For field definitions, press **F1**. For information about report sections, see <u>Understanding sections in report templates</u>.
- 3. From the list of sections, select a section.
- 4. From the **Page Break** list, select where you want to include a page break for the selected section.
- 5. To collapse sections that do not include information, select **Collapse if blank**.
- 6. To allow sections to continue on multiple pages, select **Allow sections to break across multiple pages**.

## To set options for an added section

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. Double-click any header to display the **Define Sections** dialog box. For field definitions, press **F1**. For information about report sections, see <u>Understanding sections in report templates</u>.
- 3. From the list of sections, select the added section.
- 4. From the **Sorting** list, select the order for which you want to sort the information.

# Adding fields and field labels to report templates

#### To add a field and field label

- 1. Create or modify a report template.
  - The report appears in the Report Designer.
- 2. In the toolbox, click the **Field** tool.
- 3. Position the cross-hair pointer on the template where you want to insert a field, and then click and drag the mouse to define the field's size.



Place the appropriate fields in the appropriate sections of the report or subreports. For example, to group activity values for a contact, place Activities fields in a section grouped by contact name. You can <u>add a section</u> if it is not available in your template.

When you release the mouse button, the Select Field dialog box appears. For field definitions, press F1.

- 4. From the **Select a record type** list, select a record type for the field you are adding, and then select the field you want to add from the **Fields** list.
- You can add a field from your My Record. For example, if you want your name on a sales report.
- 5. (Optional) By default, the **Include a label** check box is selected. To avoid adding a label, clear the check box.
- 6. Click Add.
  - You can continue to add fields, or you can click Close to close the dialog box.
- 7. (Optional) Drag the section titles up or down in the window to make room to add fields.

See Adding page numbers, dates, and times to add a system field.



The template displays alpha-characters in the field that indicates where the information is coming from. This can help you verify that the fields are in the correct section. For example, alpha-characters for contact reports are: CH, CN, CA, CO, SC, C, My.

# Adding a summary field to a report template

## To add a summary field

- 1. Add the field you want to use as the summary field to the report template.
- 2. From the shortcut menu, click **Properties**.

  The Field Properties dialog box appears. For field definitions, press F1.
- 3. Click the **Data** tab, and then select **Summary** as the **Field Type**.
- 4. From the **Summary Field Options** box, select the type of summary field you want to create, and then click **OK**.



The template displays alpha-characters in the field that indicates the type of information in the summary field. This can help you verify that the fields are in the correct section. <u>COUNT</u>, <u>SUM</u>, <u>AVG</u>, <u>MIN</u>, <u>MAX</u>. For more information about summary fields, see <u>Understanding</u> <u>summary fields</u>.

# Adding and removing picture fields on report templates

The picture field allows you to pull a picture into a report from a contact's record. To add a picture field, you must have a picture field in your database.

## To add a picture field to a report template

- 1. Open the Report Designer.
- 2. From the **Toolbox**, click **Picture Field**.
- 3. Position the cross-hair pointer where you want to insert the field, and then drag it to define the size.
  - The Select Field dialog box appears. For field definitions, press F1.
- 4. From the **Select a record type** list, select a record type.
- 5. From the **Fields** list, select the field.
- 6. (Optional) By default, the **Include a label** check box is selected. To avoid adding a label, clear the check box.
- 7. Click **Add**, and then click **Close**.

## To remove a picture field from a report template

- 1. Open the <u>Report Designer</u>.
- 2. Select the picture field, and then press **DELETE**.

# Adding history, activity, note, and opportunity date ranges to report templates

# To add a history, activity, note, or opportunity date range to a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. In the **Toolbox**, click the **System Field** tool.
- 3. Position the cross-hair pointer on the template where you want to insert the field, and then click and drag the mouse to define the field's size.
- 4. From the **Select System Field** dialog box, select **Activity Range**, **Note Range**, **History Range**, or **Sales Range**, and then click **Add**.
- If you do not want to add a label to the system field, clear the Include a label field on the Select System Field dialog box.
- 5. Continue adding fields, or click **Close** to close the dialog box.

# Moving objects and fields in report templates

## To move objects in a report template

- 1. Create or modify a report template.
  - The report appears in the Report Designer.
- 2. Select the object you want to move, and then drag it to another location in your form.
- **i** ,

You can set up options so that objects "snap" or align to gridlines. For more information, see <u>Turning on Snap to Grid</u>.

## To nudge an object

Select the object, and then use your arrow keys to nudge the object up, down, left, or right.

## To move an object pixel-by-pixel

Select the object, press and hold **Ctrl**, and then use your arrow keys to move it pixel-by-pixel up, down, left, or right.

# **Deleting fields or field labels from report templates**

## To delete a field or field label from a report template

- Modify a report template.
   The report appears in the Report Designer.
- 2. Select the field label or field to delete, and then press **DELETE**.

# Adding and removing pictures on report templates

You can add a picture, such as a logo, to a report template.

## To add a picture to a report template

- 1. Open the Report Designer.
- 2. From the **Toolbox**, click **Picture**.
- 3. Position the cross-hair pointer where you want to insert the image, and then drag it to define the size.
- 4. From the **Open Image** dialog box, locate the picture, and then click **Open**. The image appears on the template.

## To remove a picture

• Select the picture, and then press **DELETE**.

# **Resizing pictures on report templates**

## To resize a picture on a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Select the picture you want to resize.
- 3. Point and hold your mouse over a border of the picture until a double-sided arrow appears.
- 4. Drag the mouse to expand or contract the image to the desired size. You can use the <u>PictureAlign</u> property from the Properties window to align the image on the template. For information about the Properties window, see <u>Using the Properties Window in a report template or layout</u>.

# Adding or changing object borders on report templates

## To change a border style on a report template

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. Select one or more objects.
- 3. From the toolbar, select the style from the **Border Style** list.

## To change a border color on a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Select one or more objects.
- 3. From the toolbar, select the line color from the **Border Color** list.

## Adding a rectangle to report templates or layouts

You can use the Rectangle tool to add a rectangle, square, or horizontal line to a report template or layout. To create a horizontal line, Snap to Grid must be off. For more information about the Snap to Grid feature, see <u>Turning on Snap to Grid in a report template or layout</u>.

#### To add a rectangle, square, or line to a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. In the **Toolbox**, click the **Rectangle** tool.
- 3. Position the cross-hair pointer on the template where you want to place the rectangle or square.
- 4. Click and drag the mouse to define the width and height.

or

Define the width and height in the **Properties Window**. For more information, see <u>Working with fields and objects in the Properties window</u>.

### To add a rectangle, square, or line to a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Toolbox**, click **Drawing**, and then click **Rectangle**.
- 3. Position the cross-hair pointer on the layout or template where you want to place the rectangle or square.
- 4. Click and drag the mouse to define the width and height.

or

Define the width and height in the **Properties Window**. For more information, see <u>Working with fields and objects in the Properties window</u>.

# Adding or changing fill color in report templates or layouts



If the Properties window is not visible, press F4.

#### To add or change a field's or object's fill color in a report template or layout

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select one or more objects on which to change the fill color.
- 3. From the **Properties** window, in the **Background Color** list, select the color.

### To remove the fill color in a report template or layout

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select one or more objects on which to remove the fill color.
- 3. From the **Properties** window, in the **Background Color** list, click the **Web** tab, and then click **Transparent**.

# Adding or changing border color in report templates or layouts



If the Properties window is not visible, press F4.

## To add or change an object's border color in a report template or layout

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select one or more objects on which to change the line color.
- 3. From the **Properties** window, in the **Border Color** list, select the color.

#### To remove border color in a report template or layout

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select one or more objects on which to remove the line color.
- 3. From the **Properties** window, in the **Border Color** list, click the **Web** tab, and then click **Transparent**.

# Aligning fields and objects in layouts

You can align fields and objects in one of the panels on a layout by selecting the fields and setting the alignment option. For example, you can align the fields and objects in one of the tab panels, such as the User Fields panel, but you cannot align the fields and objects for multiple panels, such as the User Fields panel and the fields in the top area of the layout.

## To align fields or objects with one another in a layout

- 1. Open the <u>Layout Designer</u>.
- 2. Select the fields or objects to align with one another. For information about selecting multiple objects, see <u>Selecting more than one object in a report template or layout</u>.
  - Fields and objects will align with the first one you select.
- 3. From the **Format** menu, point to **Align**, and then click **Lefts**, **Centers**, **Rights**, **Tops**, **Middles**, or **Bottoms** depending on how you want to align the items you selected.
  - The options determine how the selected objects align horizontally in relation to the first item you select. For example, if you select a rectangle and an oval, and then select Lefts, the oval moves so that its left edge aligns vertically with the rectangle's left edge.

# **Showing sections in report templates**

## To show a section in a report template

1. Create or modify a report template.

The report appears in the Report Designer.

2. Click the section you want to show.

or

If the section is part of a subreport, double-click the subreport to display the sections for it, and then click the section you want to show.



If the Properties window is not visible, from the View menu, click Properties Window.

3. From the **Visible** list in the **Properties** window, select **Yes**.

# **Resizing sections in report templates**

## To resize a section in a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Point and hold your mouse over a border of the section heading until a double-sided arrow appears.
- 3. Click and drag your mouse up or down to expand or contract the section.

# Working with fields and objects in the Properties window

#### To view attributes in a report template or layout

- 1. Open the <u>Properties Window</u>.
- 2. In the report template or layout, select a field or object.
- 3. Locate the property control you want to modify, and then do one of the following:
- If the property control contains a drop-down list, select a value from the list.
- If the property control contains a numeric value, specify the value.
- If the property control contains text, edit the text.
   For information about property controls and how to use them, see <u>Attribute properties</u>.

#### To display an attribute's definition in a report template or layout

• Click an attribute name in the **Properties window**. The definition appears at the bottom.

# Adding page numbers, dates, and times to report templates

#### To add page numbers, dates, and times to a report template

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. From the **Toolbox**, click the **System Field** tool.
- 3. Position the cross-hair pointer on the template where you want to insert the page number, date, or time, and then click and drag the mouse to define the field's size.
  - The Select System Field dialog box appears. For field definitions, press F1.
- 4. Select the first field you want to add (**Page Number**, **Print Date**, or **Print Time**).
- 5. (Optional) By default, the **Include a label** check box is selected. To avoid adding a label, clear the check box.
- 6. Click **Add**.
- 7. (Optional) Continue adding fields, and when finished, click **Close**.

# Copying a field or object in report templates or layouts

### To copy a field or object in a report template or layout

- 1. Open a <u>report template</u> or <u>layout</u>.
- 2. Select the field or object you want to copy.
- 3. On the toolbar, click the **Copy** tool.
- 4. Select the tab, layout, or template where you want to copy the field or object, click inside the layout or template, and then click the **Paste** tool.

## **Removing objects in report templates or layouts**

## To remove an object in a report template or layout

- 1. Open a <u>report template</u> or <u>layout</u>.
- 2. Select the object, and then press **DELETE**.

## Adding text to report templates

#### To add text to a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. In the **Toolbox**, click the **Text** tool.
- 3. Position the cross-hair pointer on the template where you want to insert the text, and then click and drag the mouse to define the size.
- 4. In the **Properties Window**, click in the right column of the **Text** field. For more information about the Properties Window, see <u>Using the Properties</u> <u>Window in a report template or layout</u>.
- 5. Type the text you want to add to the template.

  If the text does not fit in the text box, it wraps to the next line.
- 6. Select the text object, and then use the buttons and lists on the toolbar to format the text. For more information about formatting text, see <a href="Formatting text">Formatting text</a>, see <a href="Formatting text">Formatting text</a> in a report template.

## Formatting text in report templates

#### To format text in a report template using the toolbar

- 1. Create or modify a report template.
  - The report appears in the Report Designer.
- 2. Add text, or select the text object that you want to format.
- 3. Use the buttons on the toolbar to do the following:
- To change the font, select the font from the list, and then select the font size.
- To change the way the font looks, click the **Bold**, **Italic**, or **Underline** button.
- To change the alignment, click the **Align Left**, **Align Center**, or **Align Right** button.
- To change the font color, from the **Font Color** list, select the font color you want to use for the text.
- To fill the background of the text object with a specific color, from the **Fill Color** list, select the color you want to use for the background.
- To specify the border color for the text object, from the **Border Color** list, select the color you want to use.
- You will only see a border for the text object if you picked a border from the Border Style list.
- To specify a border for the text object, from the **Border Style** list, select the border you want to use.

### To format text in a report template using the Properties Window

- 1. <u>Create</u> or <u>modify</u> a report template.
  - The report appears in the Report Designer.
- 2. Add text, or select the text object that you want to format.
- 3. If the **Properties Window** is not visible, from the **View** menu, select **Properties Window**.
- 4. From the **Properties** box, expand the **Font** attributes by clicking the plus sign to the left of the **Font** field.
- 5. From the lists, select the font attributes. For information about any of the font attributes, see <u>Attribute properties</u>.

## Aligning text in report templates or layouts

### To align text in a report template or layout

- 1. Open the Report Designer or the Layout Designer.
- 2. Select the text object.
- 3. In the report template, in the **Properties Window**, select an option from the **Alignment** list.

or

In the layout, in the **Properties Window**, select an option from the **Text Alignment** list.

# Underlining or striking out text in report templates or layouts

#### To underline text in a report template or layout

- 1. Open the <u>Layout</u> or <u>Report Designer</u>.
- 2. From the toolbar, click the **Underline** button.

#### To strike out text in a report template or layout

- 1. Open the <u>Properties Window</u>.
- 2. From the **Properties Window**, expand the **Font** control properties by clicking the plus sign (+) next to Font. For information about property controls and how to use them, see <u>Attribute properties</u>.
- 3. In the **Strikeout** list, click **True**.

# Centering a field or object in report templates or layouts

You can center fields and objects horizontally or vertically in a layout or template.

### To center a field or object on a layout or report template

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select the object you want to center.
- 3. From the **Format** menu, point to **Center**, and then click **Horizontally** or **Vertically**.

## Making objects the same size in layouts or templates

#### To make objects the same size in a layout or template

- 1. Open a report template or layout.
- 2. Select the objects you want to make the same size.

  Multiple objects are resized to the width or height of the first object that you select.
- 3. From the **Format** menu, point to **Make Same Size**, and then click one of the following:
  - **Width** Resizes objects to be the same width.
- **Height** Resizes objects to be the same height.
- **Both** Resizes both the object widths and heights to be the same.

## Resizing objects in report templates or layouts

## To resize an object in a report template or layout

- 1. Open a report template or layout.
- 2. Click on the object you want to resize.
- 3. Position the pointer over the object, and when the pointer changes to a double-sided arrow, click and hold the left mouse button, and then drag the arrow to the desired size.

#### or

Use the <u>Properties Window</u> to enter the width and height of the object's size.

# Resizing multiple fields and objects on a report template

#### To resize multiple fields and objects on a report template

- Create or modify a report template.
   The report appears in the Report Designer.
- 2. Press and hold **SHIFT**, and then click the objects you want to resize.
- 3. From the **Height** field in the **Properties Window**, specify the height of the object.
- 4. From the **Width** field in the **Properties Window**, specify the width of the object.

For more information about the Properties Window and how to use it, see <u>Using</u> the <u>Properties Window in a report template or layout</u>.

## **Data types**

Field type	Data allowed in fields
Address	Alphanumeric characters (letters, numbers, or symbols).
Annual Event	Dates that annually recur, formatted according to the date settings in the Microsoft Windows Regional Settings control panel. The field contains a drop-down date selector.
Character	Alphanumeric characters (letters or numbers).
Currency	Numbers only, formatted according to the currency settings in the Windows Regional Settings control panel.
Date	Dates only, formatted according to the date settings in the Windows Regional Settings control panel. The field contains a drop-down date selector.
Date/Time	Date and time only, formatted according to the date and time settings in the Windows Regional Settings control panel. The field contains a drop-down date/time selector.
Decimal	Numbers and decimal points only.
E-mail	Alphanumeric characters. The address entered in the field becomes an active link to open e-mail.
Initial-Caps	Alphanumeric characters, formatted with a capital letter at the beginning of each word.

Lowercase	Alphanumeric characters, formatted in all lowercase letters. The Shift and Caps Lock keys have no effect when you type in a lowercase field.
Memo	Alphanumeric characters (letters, numbers, or symbols).
Number	Numbers only. If you type a letter in this field, it is ignored.
Phone	Numbers only.
Picture	Pictures in .bmp, .gif, .jpg, .png, .ico, .emf, or .wma format.
Time	Times only, formatted according to the time settings in the Windows Regional Settings control panel. The field contains a drop-down time selector.
Uppercase	Alphanumeric characters, formatted in all uppercase letters. The Shift and Caps Lock keys have no effect when you type in an uppercase field.
URL Address	Alphanumeric characters. The address entered in the field becomes an active link to a URL.
Yes/No	Check box. If the check box is selected, it has a "Yes" value. If the check box is cleared, it has a "No" value.

## Adding fields and field labels to layouts

You can add a field and field label to any part of a layout, including most tabs, as long as there is enough space.



You can add an existing field to a layout, or you can create a new one to add. You create a field through the Define Fields feature in ACT! Premium for Web Server. For more information about creating fields, see <u>Creating a field</u>.

#### To add a field to a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Toolbox**, in the **Field** tools list, click **Field**.



- To add a Memo, Picture, YesNo, Record Manager, or Access field, select the appropriate tool from the Toolbox.
- 3. Position the cross-hair pointer where you want to insert a field, and then drag it to define the field's size.
- 4. In the **Select Field** dialog box, select the field that you want to add. For field definitions, press **F1**.



- You cannot add the same field more than once in a layout.
- 5. The **Include a Label** check box is selected by default. If you do not want to use a field label, clear the check box.
- 6. Click Add.

## Adding a Record Manager field to a layout

### To add a Record Manager field to a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Toolbox**, click **Field**, and then click **Record Manager**.
- 3. Position the cross-hair pointer on the layout or template where you want to add the field, and then drag it to define the field's size.
  - The Record Manager field and field label appears on the layout.

## Adding an Access group box to a layout

You can add an Access group box that allows a user to make access to contacts public, private, or allows a user to specify which users and teams can access the contact.

#### To add an Access group box to a contact layout

- 1. Open a contact layout in the Layout Designer window.
- 2. From the **Toolbox**, click **Field**, and then click **Access**.
- 3. Position the cross-hair pointer where you want to insert the box, and then drag it to define the box's size.

The Contact Access group box appears on the layout.

## **Moving objects and fields in layouts**

You can move objects from a Contact, Group, or Company window to a tab, or you can move objects from one tab to another.



You can set up options so that objects "snap" or align to gridlines. For information about gridlines, see <u>Showing and hiding gridlines</u> and <u>Turning on Snap to Grid</u>.

#### To move an object to another layout

- 1. Open a layout in the Layout Designer window.
- 2. Select the object(s) you want to move.
- 3. From the toolbar, click the **Cut** button.
- 4. From the **File** menu, point to **Open**, and then select the layout you want to move the object(s) to.
- 5. Click inside the layout or tab where you want to place the object(s), and then from the toolbar, click **Paste**.

## Adding and editing tabs in layouts

#### To add a tab

- 1. Open a layout in the Layout Designer window.
- 2. From the **Edit** menu, click **Tabs**.

The Edit Tabs dialog box appears. For field definitions, press F1.

3. Click **Add Tab**.

The Add Tab dialog box appears. For field definitions, press F1.

4. Type the name of the tab, and then click **OK**. The tab appears in the Show tabs in this order list.

#### To edit a tab

- 1. Open a layout in the Layout Designer window.
- 2. From the **Edit** menu, click **Tabs**.

The Edit Tabs dialog box appears. For field definitions, press F1.

3. Select the tab you want to edit, and then click **Edit Tab**.

The Edit Tab dialog box appears. The Edit Tab dialog box is different from the Edit Tabs dialog box. For field definitions, press F1.

You cannot edit a system tab. The System tabs that display on the layout depend on the kind of layout you are using (Contact, Group, or



Company). System tabs are Contacts, Notes, History, Activities, Opportunities, Secondary Contacts, and Documents. You cannot remove a system tab, but you can hide it. For more information on hiding a system tab, see <a href="Hiding a system tab in a layout">Hiding a system tab in a layout</a>.

4. Edit the name of the tab, and then click **OK**.

The tab appears in the Show tabs list.

# Adding and removing a tab using the Properties Window in a layout

#### To add a tab to a layout

- 1. Open the Properties Window in the Layout Designer.
- 2. Click a tab to display the tab property controls. For information about property controls, see <u>Using the Properties Window</u>. For information about the controls and how to use them, see <u>Attribute properties</u>.
- 3. In the **Properties Window**, click the **Add Tab** link.

  The tab displays on the layout. You can edit the tab name or order of the tabs. For more information, see <u>Adding and editing a tab in a layout</u> and <u>Changing the order of tabs in a layout</u>.

#### To remove a tab from a layout

- 1. Open the Properties Window in the Layout Designer.
- 2. Click a tab to display the tab property controls. For information about property controls, see <u>Using the Properties Window</u>. For information about the controls and how to use them, see <u>Attribute properties</u>.
- 3. Select the tab you want to remove, and in the **Properties Window**, click the **Remove Tab** link.

The tab is removed from the layout.

## Changing the order of tabs in a layout

### To change the order of tabs in a layout

- 1. Open a layout in the Layout Designer window.
- From the **Edit** menu, click **Tabs**.
   The Edit Tabs dialog box appears. For field definitions, press F1.
- 3. Select the tab, and then click **Move Up** or **Move Down**, and then click **Close**.

## **Hiding system tabs in layouts**

### To hide a system tab in a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Edit** menu, click **Tabs**.

  The Edit Tabs dialog box appears. For field definitions, press F1.
- 3. Select the tab from the **Show Tabs** list, and then click the left arrow button. The tab appears in the Hidden Tabs list.

## **Removing tabs from layouts**

You can remove a tab from a layout, but removing the tab does not delete the fields on the tab.

### To remove a tab from a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Edit** menu, click **Tabs**.

  The Edit Tabs dialog box appears. For field definitions, press F1.
- 3. Select the tab, and then click **Delete Tab**.
- 4. Click **Yes** to confirm the deletion.

You cannot delete system tabs from the Edit Tabs dialog box, but you can hide them. The System tabs that display on the layout depend on the kind of layout you are using (Contact, Group, or Company). System tabs are Contacts, Notes, History, Activities, Opportunities, Secondary Contacts, and Documents. For information about hiding tabs, see <a href="Hiding tabs">Hiding tabs</a>.



## **Displaying Tab Stops and Enter Stops in layouts**

You can view the Tab Stops and Enter Stops on a layout, but you can only view one set of Stops at a time.

#### To display Tab Stops in a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **View** menu, point to **Tab Stops**, and then click **Show Tab Stops**. The Tab Stops display in red boxes where a Tab Stop has been set. The number inside the box indicates the order of the Tab Stops. For example, the first tab stop is "0", the second tab stop is "1", the third tab stop is "2", and so on.
- 3. To close the **Tab Stops** view, from the **View** menu, point to **Tab Stops**, and then clear the **Show Tab Stops** check mark.

#### To display Enter Stops in a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **View** menu, point to **Enter Stops**, and then click **Show Enter Stops**.
  - The Enter Stops display in green boxes where an Enter Stop has been set. The number inside the box indicates the order of the Enter Stops. For example, the first stop is "0", the second stop is "1", the third stop is "2", and so on.
- 3. To close the **Enter Stops** view, from the **View** menu, point to **Enter Stops**, and then clear the **Show Enter Stops** check mark.

## Adding and removing images in layouts

You can add an image to a layout, such as a logo, or you can <u>add a background</u> <u>image</u> that covers your entire layout.

#### To add an image to a layout

- 1. Open the <u>Layout Designer</u>.
- 2. From the **Toolbox**, click **Drawing**, and then click **Image**.
- 3. Position the cross-hair pointer where you want to insert the image, and then drag it to define the size.
- 4. From the **Open** dialog box, locate the image, and then click **Open**.

The image appears on the layout.

#### To remove an image

• Select the image, and then press **DELETE**.

# Adding and removing background colors and images in layouts

### To add or change background color in a layout

- 1. Open a layout in the Layout Designer window.
- 2. Click anywhere in the background of the layout, but do not click an object, such as a field or a field label.
- 3. In the **Properties Window**, click the right column of the **Background Color** field, and then click the browse (...) button.
- 4. From the **Custom**, **Web**, or **System** tab, select a color.

#### To remove the background color from a layout

- 1. Open a layout in the Layout Designer window.
- 2. Click anywhere in the background of the layout, but do not click an object, such as a field or a field label.
- 3. In the **Properties Window**, click the right column of the **Background Color** field, and then click the browse (...) button.
- 4. From the **Web** tab, click **Transparent**.

#### To add or change a background image in a layout

- 1. Open the Properties Window in the Layout Designer.
- 2. Click anywhere in the background of the layout, but do not click an object, such as a field or a field label.
- 3. In the **Properties Window**, click the right column of the **Background Image** field, and then click the browse (...) button.
- 4. Locate the image, and then click **Open**. The image displays as the background of the layout.
- 5. (Optional) In the **Image Options** list, select to make the background image appear as normal, tiled, or stretched across the background border.

### To remove a background image from a layout

- 1. Open the Properties Window in the Layout Designer.
- 2. Click anywhere in the background of the image on the layout. Do not click an object, such as a field or a field label.
- 3. In the **Properties Window**, click the right column of the **Background Image** field, select the file name of the image, and then press **DELETE**.

## Adding an ellipse or circle to a layout

### To add an oval or circle to a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Toolbox**, click **Drawing**, and then click **Ellipse**.
- 3. Position the cross-hair pointer on the layout or template where you want to place the ellipse or circle.
- 4. Click and drag the mouse to define the width and height.

## **Layering objects in layouts**

You can specify how objects in a layout overlap each other.

### To layer an object in a layout

- 1. Open a layout in the Layout Designer window.
- 2. Select the object you want to layer.
- 3. From the **Format** menu, point to **Order**, and then click one of the following:
- **Bring to Front** Moves the object to the top of the layout or another object.
- **Send to Back** Moves the object to the bottom of the layout or another object.

## Adding text to layouts

You can add text anywhere on a layout. You may want to add text as a label for the Record Manager, as a title for the layout, or to describe something on the layout.

#### To add text to a layout

- 1. Open a layout in the Layout Designer window.
- 2. From the **Toolbox**, click **Drawing**, and then click **Text**.
- 3. Position the cross-hair pointer on the layout or template where you want to add the text, and then drag it to define the size of the text box.
- 4. In the text box, position the cursor in the text field and edit the text.
- 5. Click out of the text box when you are done.

## **Changing fonts in layouts**

### To change the font, font style, and font size in a layout

- 1. Open a layout in the Layout Designer window.
- 2. Select the item you want to change.
- 3. On the toolbar, from the **Font** list, select the font type you want to use.
- 4. On the toolbar, from the **Font Size** list, select the font size.
- 5. On the toolbar, click the **Bold**, **Italic**, and **Underline** buttons to format the style of the font.



You can further customize the font from the Unit, GdiCharSet, GdiVerticalFont, Text, and Text Alignment fields in the Properties Window. For more information about control properties and how to use them, see Attribute properties.

## **Changing the spacing of objects in layouts**

#### To change the horizontal spacing of objects in a layout

- 1. Open the <u>Layout Designer</u>.
- 2. Select two or more objects you want to space horizontally. For information about selecting multiple objects, see <u>Selecting more than one object in a report template or layout</u>.
- 3. From the **Format** menu, point to **Horizontal Spacing**, and then click one of the following:
- Make Equal This creates equal spacing between three or more objects.
- **Increase** This increases the space between two or more objects.
- Decrease This decreases the space between two or more objects.
- Remove This removes horizontal spacing.

#### To change the vertical spacing of objects in a layout

- 1. Open the <u>Layout Designer</u>.
- 2. Select two or more objects you want to space vertically. For information about selecting multiple objects, see <u>Selecting more than one object in a report template or layout</u>.
- 3. From the **Format** menu, point to **Vertical Spacing**, and then click one of the following:
- Make Equal This creates equal spacing between three or more objects.
- **Increase** This increases the space between two or more objects
- Decrease This decreases the space between two or more objects.
- Remove This removes vertical spacing.

# Adding or changing an object's borders in report templates or layouts

### To add or change an object's borders in a report template or layout

- 1. Open the <u>Layout Designer</u> or the <u>Report Designer</u>.
- 2. Select one or more objects on which to add or change a border.
- 3. On the toolbar for the report template, from the **Border Style** list, select the border from the list.

#### or

On the toolbar for the layout, click the **Border Style** tool, and then select the border from the list.

## Changing the border thickness of objects on layouts

### To change the border thickness of an object on a layout

- 1. Open the <u>Layout Designer</u>.
- 2. Select the object you want to change.
- 3. From the **Border Thickness** list on the toolbar, select the thickness for the object border.

## **Anchor**

You can change the Anchor property from the Report Designer.

**Description:** Determines the placement of a control.

**Used for:** Anchoring a control in your form

<u>Value</u>	Result
Тор	Indicates the object is anchored at the top boundary of the control's container.
Bottom	Indicates the object is anchored to the bottom boundary of the control's container.
TopAndBottom	Indicates the object is anchored to both the top and bottom boundary of the control's container.

**Default:** Top

### To use this property

• Click in the right column of the **Anchor** field, and then select **Top**, **Bottom**, or **TopAndBottom** to indicate where you want to anchor the control.

## **Hide Duplicates**

You can change the Hide Duplicates property in the Report Designer.

**Description:** Indicates whether duplicate values in consecutive records

should be automatically suppressed.

**Used for:** Hiding duplicate values in consecutive records.

<u>Value</u>	Result
Yes	Hides duplicate values in consecutive records.
No	Shows duplicate values in consecutive records.

**Default:** No

#### To use this property

• Click in the right column of the **Hide Duplicates** field, and then select **Yes** or **No** from the list.

## **Image**

You can change the Image property in the Layout Designer.

**Description:** An image.

**Used for:** Displaying an image on the form.

<u>Value</u>	Result
HorizontalResolution	Displays the horizontal resolution, in pixels-per-inch. You cannot change this value.
PhysicalDimension	Displays the height and width of the image. You cannot change this value.
PixelFormat	Displays the pixel format of the image. You cannot change this value.
RawFormat	Displays the format of the image. You cannot change this value.
Size	Displays the width and height of the image. You cannot change this value.
VerticalResolution	Displays the vertical resolution, in pixels-per-inch. You cannot change this value.

### To use this property

- 1. Click the browse (...) button in the right column of the **Image** field, and then locate and select an image to add.
- 2. Click **Open**.

## **Image Options**

You can change the Image Options property in the Layout Designer.

**Description:** Determines the image placement and sizing.

**Used for:** Setting the image within the boundaries of the background.

<u>Value</u>	Result
Normal	Uses the normal size of the image.
TileImage	Tiles the image within the boundaries of the background.
StretchImage	Stretches the image to fit within the boundaries of the background.

### To use this field

• Click in the right column of the **Image Options** field, and then select one of the options.

## Activities did not synchronize

#### **Problem**

After synchronizing, activities for a contact do not display in my calendar although they do in another user's calendar.

#### **Reasons for problem**

There are several reasons why this may occur.

1. Your remote database may only contain a subset of contact records in the main database, so the record to which the activity is attached is not part of the Sync Set assigned to your remote database.

**Solution**: Ask the Administrator or Manager user to add the contact record(s) to the Sync Set, or subscribe to the record(s) using the <u>Subscription List</u>.

2. You may not have access to the contact information because the record manager for that contact record has restricted you from viewing or receiving information.

**Solution**: Ask the record manager of the contact to add you to the contact's access list.

3. The synchronization relationship may be broken or synchronization may be halted by the administrator.

**Solution**: Ask the Administrator user for assistance.

# Can I create a remote database from a remote database?

#### **Problem**

I am using a remote database and cannot create a remote database.

### **Reasons for problem**

Only the user with an Administrator or Manager role on a main database can create remote databases.

#### **Solution**

You can create a Sync Set on the remote database, run synchronization to send the Sync Set criteria to the main database, and then have the Administrator or Manager user on the main database create a remote database using the Sync Set.

## **Changing the Sync Set**

#### **Problem**

I want to include a record in the Sync Set, but I cannot change the Sync Set.

#### **Reasons for problem**

Only an user with Administrator or Manager role can change a Sync Set.

**Solution**: If you are an user with a Standard role or above, either <u>add more</u> <u>contact records using the Subscription List</u> or ask the Administrator user to add the record(s) to the Sync Set.

## Files or attachments did not synchronize

#### **Problem:**

I have access to the contact record, but supplemental files or attachments did not synchronize.

#### **Reasons for the problem:**

There are several reasons why this may occur.

- 1. When the remote database was created, the Administrator did not select the options to allow supplemental files or attachments to synchronize.
  - **Solution:** Synchronize first, then ask the Administrator of the main database to <u>re-create another remote database</u>, with the options for supplemental files and attachments selected. You can then <u>unpack and restore</u> the recreated database.
- 2. It is possible that a file or attachment was being used when synchronization occurred.
  - **Solution**: The file or attachment should synchronize on the next scheduled synchronization session.

# I cannot unpack and restore a re-created remote database

#### **Problem:**

I cannot unpack and restore a re-created remote database.

#### **Reasons for Problem:**

There might be several reasons why the re-created database will not install:

- 1. Users might be logged on to the existing database.
  - **Solution:** Before continuing, all users must be logged off the existing database before the overwrite can take place. You must check all database connections, including Query Analyzer or Enterprise Manager.
- 2. If there are pending changes since the last successful synchronization or the re-created database is older than your last successful synchronization on the existing remote database, all changes made in the existing remote database will be lost.

**Solution:** You can try to synchronize the existing remote database again to get all changes to the main database and re-create the database again or click Yes to overwrite the existing database and lose the changes.

## **Contact records did not synchronize**

#### **Problem**

After synchronizing, some contact records did not synchronize.

#### **Reasons for problem**

There are several reasons why this may occur.

- 1. The record may have been removed from the main database. Once the record is removed, all data is deleted and therefore cannot synchronize.
- 2. The record may have been removed from the Sync set.
  - **Solution**: You can ask the Administrator to add the record to the Sync set, or you can use the Subscription List to add the contact record.
- 3. You may not have access to the contact information because the Record Manager for that contact record has restricted you from viewing or receiving information.
  - **Solution**: Ask the Record Manager to add you to the access list for the contact in question.
- 4. The synchronization relationship may be broken or synchronization may be halted by the administrator.
  - **Solution**: Ask the Administrator for assistance.
- 5. You may not have access to the contact information because the Record Manager has made the contact "private."
  - **Solution**: Records can be made public or private. If the Record Manager would like for you to receive information about this contact, he or she can make the record public and then limit access to the record to only you, or to only specified users.