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# 1 Foreword: ACTOptimum+

### Powerful functional upgrade for Act! 12.0 (2010) and higher



ACTOptimum+ the sixth edition of the add-on suite from Melville-Schellmann for Act! offers extended functionality and is now available for version 12.0 (2010) and above.

First released in 2002 for Act! 6.0, this "toolbox" has been continually improved and remains fully up to date, compatible with the latest Act! versions.

The standard version of Act! provides a huge amount of functionality, ACTOptimum+ expands on this and adds additional features that enhance the user experience.

Melville-Schellmann have taken onboard extensive customer feedback in order to continually improve ACTOptimum+ and incorporate additional features. The add-on suite is therefore a "living" software which will keep maturing and growing for as long as its customers want it to.

We hope the new features provided by ACTOptimum+ will enhance your user experience in the professional Act! environment.

Ahrensburg, 30.5.2017

Melville-Schellmann





# 2 Installation and Registration

To use the ACTOptimum+ software, you will firstly need to download it, then install it and finally register it.

In order to download the software, you will have been provided with a link at the point of purchase.

Once the software has been downloaded and installed, you will then need to register the software. It is possible to trial ACTOptimum+, but you will require a Registration code to continue using it.

## 2.1 Installation

Once you have downloaded ACTOptimum+ you will have an installation file called **Setup\_ACTOptimum+\_en.exe**. Make sure that Act! is closed down, as well as any other programs that you might have running before beginning the installation.

To start installing ACTOptimum+, simply double-click the installation file. You will see the below screen:

🖟 ACTOptimum+ - InstallShi	eld Wizard	×
•	Welcome to the Install Wizard for ACTOptimum+	
	The Install Wizard will install ACTOptimum+ on your compute To continue, dick Next.	r.
P	Copyright © 2006-2017 Melville-Schellmann. All rights reserved.	
	< Bady Next > Cancel	



Once you have clicked **Next** you will then be prompted to read through the license agreement.

🙀 ACTOptimum+ - InstallShield Wizard	ł			×
License Agreement			6	Ŋ
Please read the following license agree	ment carefully.			
End user license agreement				^
Please read the following regulation	is thoroughly.			
Software license agreement for a si	ngle user licens	e by Meville-Scl	hellmann	
1. Subject of this agreement				
1.1				
Melville-Schellmann grants the non				~
$\bigcirc$ I accept the terms in the license agreen	ient		Print	
I do not accept the terms in the license	agreement			
InstallShield				
	< Back	Next >	Cancel	

Please make sure you agree to the terms of the license agreement, then click Next.

The following two screens will prompt you to input your **User Name** and **Organization**, then will ask you if you would like to perform a **Typical** or **Custom** installation:

ACTOptimum+ - InstallShield Wizard  Customer Information  Please enter your information.  User Name: Steven Jackson  Operation:	×		
Customer Information			
Please enter your information.			
User Name:			
Steven Jackson			
Organization:			
Swiftpage			
InstallShield			
	< Back	Next >	Cancel





Most users will prefer to use a **Typical** installation which will install all of the features of ACTOptimum+, however if you would prefer to specify which features you want to use, then you can perform a **Custom** installation.

If you choose **Custom**, and then click **Next**, you will see the following options:



Once you have chosen which components to install, you can click **Next** to continue with the installation process.



If you have chosen to perform a **Typical** installation, when you click **Next** you will see the following screen instead that confirms the choices you have made:

d ACTOptimum+ - InstallShield Wizard	×
Ready to Install the Program	Ŋ
The wizard is ready to begin installation.	
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	
Current Settings:	
Setup Type:	
Custom	
Destination Folder:	
C:\Program Files (x86)\ACT\Act for Web\	
User Information:	
Name: Steven Jackson	
Company: Swiftpage	
InstallShield	

The final step is to click the **Install** button. This will then install ACTOptimum+ for you.

🚼 ACTOpti	mum+ - InstallShield Wizard	ſ	-		×
Installing	ACTOptimum+			1	
The prog	ram features you selected are	being installed.			
1	Please wait while the Install V several minutes.	Vizard installs ACTC	Optimum+. This may	y take	
	Status:				
InstallShield –					
		< Back	Next >	Cance	el





On restarting the Act! application, you will find the program modules of **ACTOptimum+** available. A detailed description of these features follows from section **3** onwards. A new menu item in Act! also allows you to configure the individual modules.

In case you want to uninstall the program, you can do so from **Programs and Features** as normal, or you can go to **Start → All Programs → Melville\_Schellmann →** ACTOptimum+ → ACTOptimum+ **uninstall** 



# 2.2 Registration

Once you have installed ACTOptimum+ and then restarted the Act! Application, you will be prompted to register your copy of the ACTOptimum+ software.

a	Product registrati	on	×
	ACTOptin	num+	
	- Registration data fo	ACTOptimum+	
	System number	3732357747	
	License number	· .	
	Registration code		Where?
	Cancel	Test	Register

If you wish to trial ACTOptimum+ you can click on the **Test** button. Once you have completed all of the infromation correctly, click the **Register** button to actually register the software.

Your **License number** will be provided for you at the point of purchase, and will take the format of 4 lower case letters followed by 6 numbers (eg. abcd-123456).

To get a **Registration code**, you have two options available. Firstly you can choose to fill out an online registration form. You can access this form by clicking the **Where?** Button which will show the following screen:

🚯 Information about registration 🛛 🛛 🔀
Where can I get the license number?
The license number consists of four small letters and six digits. For example: abcd-123456 You will receive your license number either: - on your bill from your vendor - from your reseller of Melville-Schellmann products. If you have questions about your license number, please call us at the telephone number below.
Where can I get the registration code? The registration code consists of six digits and is generated from your system number and license number. The registration code can be obtained: • Via e-mail from our online registration page. • By phone on weekdays between 9am to 5pm (GMT+1).
Registration on the Internet:     Registration page       Registration over the phone:     +49 4102 80 365 0 (Germany)
ОК

Next to **Internet registration** you can see a link to click to fill out the online registration form. This will provide you with a **Registration code** that you can use to complete your registration.

Alternatively, you can register over the phone by calling Melville-Schellmann. If you take this option, you will need to provide your **System number** and your **License number** to the technician that you speak to. The technician will take this information and use it to provide you with a **Registration code** which will allow you to complete the registration process.





# 3 Overview of available modules

ACTOptimum+ contains the following additional functions.



### ActPlus

Adds context menus that provide quick links between different Act! database entities (contacts/companies/groups/opportunities).



#### ActRemote

Is an interface that enables external applications to access the running Act! Application. Needs to be switched on to allow the additional functions included in ACTOptimum+ to run.



#### AdvancedReplace

Adds find/replace functionality to Act!, including the ability to replace only part of an Act! field (contacts/companies/groups/opportunities).

4	Ľ	Ľ
2	e	E
7	F	

#### AutoNum

Allows you to manage the numbering of fields (contacts/companies/groups/opportunities).



### AutoData

Integration of command buttons into layouts (contacts/companies/groups/opportunities) to allow automation/scripting of Act! functions, eg. calculate 2 field values into a target field etc. This is an advanced feature that requires knowledge of scripting.



### BrowserTab

Allows the creation of multiple custom tabs in various parts of the Act! program (contacts/companies/groups/opportunities) that display integrated web services (URLs) and shortcuts to folders.



### QuickSearch

Powerful custom search tool allowing you to search multiple fields that you have specified at the same time. Possible to set up multiple SchnellSuches, and available in all Act! views (contacts/companies/groups/opportunities).



### RadiusSearch

Searches contacts/companies based upon a given distance from a specified Postcode.



### ТірТар

CTI software recognizing incoming calls and that allows complete call management. Features of this include: Lookup of calling contact, creation of call history in Act!, display of previous call history etc.



#### ActPatch

Collection of various patches for the Act! application and the Act! database starting with Version 12 (2010).



# 4 Settings and configuration of ACTOptimum+

After installation of ACTOptimum+ you will find a new menu item under Tools in the Act! application

<u>T</u> oo	ls E <u>m</u> arketing <u>H</u> elp
•	Sp <u>elling</u> Alt+F7
	<u>D</u> efine Fields
Ę	Design <u>L</u> ayouts
	Design Dashboards
1	Manage <u>U</u> sers
趣	Manage Te <u>a</u> ms
	Password Polic <u>y</u>
	Data <u>b</u> ase Maintenance
	Convert Act! 3.0 - 6.0 Items
	Sca <u>n</u> for Duplicates
	Copy/Move C <u>o</u> ntact Data
R	Export to E <u>x</u> cel
	Update Salutation Field
	Synchron <u>i</u> se Database
	Synchronise with Outloo <u>k</u>
	Integrate with Google
	Set Up Offline Smart Tasks
	Act! Schedule <u>r</u>
2	Act! Scratchpad
	<u>T</u> imer
	Customise +
	Pre <u>f</u> erences
	Accounting Integration Setup
	Remove Accounting Integration
	Manage Add-ons
0	ACTOptimum+ preferences

Click on the menu item to open the configuration screen of ACTOptimum+.



# 4.1 Configuration screen of ACTOptimum+

Name	CommandBar	Menu	Index	Function Description			]
AutoData           W         With Call Contact with Ti           ActPlus         Contact with Ti	. Contact Detail T	-	-1	AutoData Starts Tip	Tap on top and di	splays the numbers of th	
ActPlus 1				ActPlus			Q
ActRemote				-			
4	3	4	5	6	7		
QuickSearch	Add	Edit	Delete	Import	Export	Details	]
AdvancedReplace AutoNum 2						Close	

- The configuration list allows you to enable/disable the ACTOptimum+ functions available in the current database. Each configuration list item (1) can be enabled/disabled individually by the logged-in user by checking/unchecking the corresponding checkbox.
- A dropdown list (2) shows all available functions from ACTOptimum+ that you can add into the Act! program. Some functions can be added multiple times, these will be discussed in their own corresponding sections later.
- 3 The **Add** button allows you to add a function to the configuration list. Only Act! administrators are allowed to do so.

4 The **Edit** button opens the details of the selected function. This allows you to set individual parameters of the function.

- **5 Delete** removes a configuration list item (1). These can then be re-added later.
- **Import** allows you to import an XML file containing a configuration from elsewhere. You would use this if you bought a new laptop and wanted to transfer youy ACTOptimum+ configuration to it.
- 7 Export allows you to export a configuration list or parts of it (highlighted) to an XML file so that it could be imported later. The configuration of ACTOptimum+ is saved to the current Act! database. Exporting a configuration is meant to be used in cases where a configuration needs to be transferred to another Act! database.
- 8 The tab **Settings management** contains some administrative functions like deleting all settings from this database, importing old ACTOptimum+ settings or reloading of current settings.

The detailed settings (ie. what is found behind the **Edit** button) of each function will be described in the corresponding chapter below.

Please note that the various functions can be added to the configuration more than once and into different places in the Act! application using different settings for each function.



# 4.2 General settings for all ACTOptimum+ functions

Whenever you add another function into your ACTOptimum+ preferences (as per the previous screenshot), you will be prompted to configure settings for that function.

There are some settings that are general for all Act! functions that you add. We will look at these now.

Please Note: As this manual progresses we will be looking at each ACTOptimum+ function in detail, however we will not explain these settings each time as they are identical across all of the functions that you can add.

Using **QuickSearch** as an example, we will now explain these settings.

Select **QuickSearch** from the dropdown list and click the **Add** button to add this function to the configuration list.

This screen will open:

P QuickSearch settings	_	×
Lookup for words fragment in many fields		
General Field selection Settings management		
Name		
1 QuickSearch		
2 Tooltip Scans multiple preset fields simultaneously by word fragments		
3 Scans multiple preset fields simultaneously by word fragments		
Menu		511
4 Connected Menus	•	
5 File	•	
Index 6 -1		
7 Separator		
Shortcut		5
8 Delete	shortcut	
	Next	-
ОК	Can	cel



### 4.2.1 General Tab

This Tab will set the displayed function name and the location of the menu item.

- Set the function name (especially important if you intend to use the function more than once).
- 2 Tool tip (visible in case the function appears in a toolbar).
- **3** Extended text description (optional).
- 4 Set the location of the function icon (one of the toolbars or a menu item).
- 5 If "Connected Menus" was selected under 4, the actual menu to be used is set here.
- 6 If "Connected Menus" was selected under 4, the "Index" specifies the item position.
- 7 An optional separator can be added above the menu item.
- 8 "Shortcut" offers the option to use a keyboard function to call up the item.

### 4.2.2 Settings Management Tab

The Tab Settings-Management contains 2 options:

P QuickSearch settings	
Lookup for words fragment in many fields	
General Field selection Settings management	
Settings type	
1	
Applicable for minimal access level           2         Browse	
ОК	Cancel

Setting the checkbox will set the configuration of the selected function to "global". Only Act! Administrators can change the settings now.

2 An Act! user security role can be set as the minimum required level to use this function. Setting up this configuration is the same procedure as for the other ACTOptimum+ functions and is therefore **not repeatedly shown** in the following descriptions.



# 5 QuickSearch

## 5.1 Introduction

Finding and displaying contacts (as well as companies, groups and opportunities) *quickly* is one of the most basic requirements of any contact management tool. Searching in several fields simultaneously using fragments of the search term is the most convenient way of getting the best results.

The basic version of Act! allows you to perform a wildcard search, but it is limited to the Universal Search function.

**QuickSearch** is extremely practical and easy to use. It traces contacts, companies, groups and opportunities in a matter of seconds, using fragments of the search term in freely definable fields.

# 5.2 Configuration of QuickSearch

**QuickSearch** has only one tab containing specific parameters. The other two are the generic settings tabs that we have already discussed earlier. The tab **Field selection** is used to select the main entity and the Act! fields to be used simultaneously.

Qu	ickSearch settings	fragment in many	r fields	
Gen	neral Field selection Se	ettings manageme	nt	
	Field selection setting			
1	Contacts Not selected fields		Selected fields	-
2	Address 1 Address 2 Address 3 Attemate Extension Attemate Phone Blog Children Names City Cubs Associations Company Contact Country Department E-mail E-mail Pemission Extension Fax Phone Hobbies Home Address 1 Home Address 3 Home Cupy Home Country		3	
				Next
			ОК	Cancel

- Choose the main entity (contacts, companies, groups or opportunities). In the area below (2) you will see the corresponding field list.
- A double click on a field on the left side will move the field into the right area (3). Up to 20 fields can be selected.
- 3 Shows the selected fields to be searched simultaneously.



# 5.3 Using QuickSearch in Act!

Once you initiate the **ACTOptimum+** function **QuickSearch**, a search window appears where you can enter one or more search terms. You only need to type fragments of words to filter all data records containing these search entries.

After confirming with **OK**, the Act! program searches for the fragment you entered in the fields selected.

P QuickSearch
Scans multiple preset fields simultaneously by word fragments
Contacts 1
Current lookup
2 North View
Lookup type
exact match lookup
3 O lookup for any of the typed words
Iookup for all of the typed words
Lookup options
A October 2010 Control Cont
Add to lookup
🔘 L <u>i</u> mit lookup
<u>C</u> ancel <u>O</u> K

- Act! main entity for current lookup
- 2 Input field (with dropdown list containing last 10 lookups)
- 3 Lookup options (sticky setting): exact match, any word (OR), all words (AND)
- 4 Gives the options (sticky setting) "replace current lookup", "add to current lookup", "narrow current lookup".

Note: If one of the search terms in the above dialogue (2) is longer than the length of the shortest field from the list of fields, a message "search string too long" will appear.

The option "all words" allows you to look up things like "mill alan swift" to find somebody whose last name starts with "Mill", first name is "Alan" and he might work for "Swift"page.

Recommendation: Set a keyboard shortcut for the function (e.g. F3) on the General tab.



# 6 ActReplace

## 6.1 Introduction

Act! already includes a function that lets you replace the contents of any field with other data. But only the contents of the entire field can be replaced; replacement of field fragments is not supported.

For example, Act! allows you to set up dropdown lists with multiple selections, using a default separator (semicolon) between values. You cannot add or replace individual values en masse with this set-up.

This gap has been bridged with ActReplace.

# 6.2 Configuration of ActReplace

No special options to be set up except the general settings which were covered earlier.

# 6.3 Using ActReplace in Act!

1	AdvancedReplace
	Scans and replace in a field also parts of a field content
	Contacts 1
	Field selection
2	ID/Status
	Replace
3	Find: Customer 💌
	Replace with: Purchaser
	Options
	Case sensitive
4	Use separator ( For example ":" on multiple selection)
	Current separator: ;
	Lookup domain
Ļ	Ourrent contact list
5	O All contacts
	Progress
	Close

- **ActReplace** shows the current main entity (contacts, companies, groups, opportunities).
- 2 Field list of current entity.
- 3 Input window for search string and replace string. The special parameter {0} allows you to set the current field content as placeholder. So for example, if I wanted to add +44 to the start of the phone field, I would use {0} in the find field and +44{0} in the Replace with field.
- 4 Sets case sensitivity on or off and configures the usage of a field separator to be able to add or remove it. This is customizable as customers may have used their own separators when filling out fields (eg. Having a city field completed with a value of Ealing, London)
- 5 Selects the lookup specified for the replace operation (current lookup or all records of the current entity).



# 7 AutoNum

# 7.1 Introduction

Generating a unique number for Act! record has many advantages:

- You can use the number as a reference key for export /import tasks.
- Give your mailings/documents unique IDs, in order to assign replies more quickly.
- Create customer dossiers with corresponding numbers.
- Create unique project IDs (especially useful for Opportunities).

These thoughts led to the development of AutoNum for Act!

# 7.2 Configuration of AutoNum

券 Au	utoNum settings
-	Allows the numeration of contacts-, groups-, companies- and opportunities -records
Ge	neral AutoNum Settings management
	Data area
1	Opportunities
	field selection for numeration
2	Opportunity Name
	Numerations setting
3	Prefix: OPP
4	Suffix: NAM
5	Length: 8
6	Preview OPP00000014NAM
	Warnings
7	Show "insufficient remaining digits" while exceeding the length of the numerations.
	Next number
8	21 Reset
	Next
	OK Cancel

- Set the main entity (contacts, companies, groups, opportunities)
- 2 Select the field which will contain the number values.
- 3 Set a prefix (optional).
- 4 Set a suffix (optional).
- 5 Set the number of digits for the number value.
- 6 Preview the selected parameters.
- 7 This checkbox enables a warning in case the selected number of digits is exceeded.
- 8 Next number value is displayed. **Reset** sets the original start value. Please note, this feature will only be available if the function has already been run on your database at least once, on the initial setup the field is greyed out.



# 7.3 Using AutoNum in Act!

Running AutoNum shows this:

# AutoNum	x
Consecutive numbering of records	
1 V Opportunities	
Apply to	
<ul> <li>Current opportunity (Only in the detail view)</li> <li>Current opportunity list</li> <li>All opportunities</li> </ul>	
<u>C</u> lose <u>S</u> tart	
Progress	

Main entity which has the target field.

- 2 Setting the record selection:

  - Current record
     Current lookup
  - o All records



# 8 AutoData command button

## 8.1 Introduction

Larger CRM solutions often include a separate area which can be customised by changing or adding program code. **AutoData** has been developed to make such facilities available to Act! users.

The possible applications of **AutoData** are many and varied. This VB.NET editor allows you to insert "codefed" command buttons in the Act! Layout. This provides a degree of flexibility that is limited only by your imagination and programming skills.

Examples include:

- Creating dependencies between Act! fields
  - Enter a Postcode and the correct town will appear
  - Select a value from a dropdown list of a given field; only certain values then appear in the dropdown list of another field, thereby narrowing the possibilities.
- Calculating field contents
  - Perform mathematical operations with the contents of one or more Act! fields and display the result, or write the result to another field.
- Saving the contents of individual fields to the clipboard to allow further processing in other applications.
- Performing a search on all contacts in the same company without having to look up the company record.
- Planning and delegating automated activities.
- Assigning a sequentially numbered name for new sales opportunities.
- Bookmarking contacts so that other Act! users can retrieve the contact.



# 8.2 Integration of AutoData command buttons into your Act! application

AutoData integrates automatically into Act!.

The activation of the **AutoData** control has to be done once in a database. Open the Act! layout editor via **Tools → Design Layouts → Contact** or **Group** or **Company** or **Opportunity**.

Right-click the grey toolbox and then click Customize...:



A window opens in which you just have to confirm the displayed selection AutoData3 with OK.

Cı	ustomise Toolbox	x
	AutoData3	
ľ		_
L	OK Cance	el



The toolbox will now show the additional button Custom .

#### Click on AutoData3.

ToolB	lox 🛛 🔀					
	Custom					
	Pointer					
<b>U</b> 3	AutoData3					
	Drawing					
	Field					

An AutoData command button can now be added to the layout.

				•	•	•	•	•	•	•	•	•
· <u>·</u> · ·				÷	•	•	•				<u>.</u>	•
· . Q				D							Ð	١.
											Įł.	
				-			_				Ŀ.	
.9		Au	ιτc		)a	L	а.				P	١.
											D.	-
· <u>.</u>				_							J£	•
· O	·· ^ ··	AA.		U	· ^ ·	· ^ ·	• ^ •	• ^ •	• ^ •	• ^ •	Ð	Ŀ.
	•	• •	•	•	•	•	•	•	•	•	•	

The properties (explained below) of the **AutoData** command button can then be viewed in the layout designer by making sure the Properties Window is being viewed (**View → Properties Window** or press **F4** on your keyboard) and then clicking on the **AutoData** button.



# 8.3 Configuration of AutoData

The configuration of **AutoData** basically involves two steps which you only need to perform once and are described in more detail below.

### 8.3.1 Specify input and output values

The AutoData command button which we will set up will do the following:

We will have a field called "Contact Status" which will have a dropdown list with 3 values: Customer, Supplier, Partner.

A Customer has either A-status, B-status or C-status. A Supplier supplies either Services, Software or Marketing. A Partner is either Business, Corporate or Reseller.

Using the command button after having set the field "Contact Status" to one of the 3 values will open ONLY the matching list, dependent on the first value chosen. The field "Detail" will be filled with a matching value.

#### 8.3.1.1 Step 1



A specially "formatted" dropdown list is required to make this workable. It has to be created first. Go to **Tools** → **Define Fields** and select "Manage Dropdown lists". Create a new list, preferably starting the name with "Autodata…" PLEASE NOTE – This dropdown will not be assigned to a field, it will be used later on as we will see below.



## 8.3.1.2 Step 2

Create List values

### Enter drop-down list values

Value	Description	Add
Customer=A-Status		
Customer=B-Status		<u>D</u> elete
Customer=C-Status		
Supplier=Services		
Supplier=Software		
Supplier=Marketing		
Partner=Business		
Partner=Corporate		
Partner=Reseller		

Both input AND output values are included in the list of values linked by the fixed, predefined character "="

### 8.3.1.3 Step 3

Create Fields and Add to Layout

You now need to create a field called "Contact Status". As advised earlier, this will be a standard field with a dropdown listing the following three values: Customer, Supplier and Partner.

You also need to create a standard field called "Detail", which we will use to populate with the Output.

Finally, an AutoData button needs to be added. Once these fields have been created and added to your layout, you should have something similar to the below screenshot:

Contact	Contact -	 :	:
Contact Status	Contact Status	 :	:
· · · · · · · · · · · · · · · · · · ·	AutoData	 :	:
Detajl	Detail 💌	:	:
		:	:



### 8.3.2 Specifying the behavior of the command button

In addition to the input and output values, the AutoData command button has other properties to control the actual "action" provided by the button.

Contact	Contact
Contact Status	Contact Status
	AutoData
	AutoData
	· · · · ·
: Detail: : : : : : : : : : : : : :	Detail 🔹 😳
. Petall	
	<b></b>

The "action" will be this: If an input value has been set for "Contact Status", pressing the button will display ONLY output values of the matching type in the **Detail** field.

### 8.3.2.1 Properties: AutoData – Output

Using the F4 key opens the Properties Window. Click on the AutoData button to see its properties.

Prop	perties		X
R	🖁 New AutoData32 (AutoDa	ita3)	•
	2↓ 🖻		
	Appearance		
	AutoData - Input/Source		
-	Source		
	Source description	Term: {0}	
4	AutoData - Layout		
	FlatStyle	Standard	
⊳	Size of the AutoData window	160, 270	
	Text	AutoData	Ξ
	TextAlign	MiddleCenter	
	Tooltip		
	Window position	1	
	AutoData - Output		
	Always overwrite	True	
	Clipboard	False	
	Message	<b>{0}</b>	
	Refresh view	False	
	Show message box	False	
	Target fields	Detail	
4	AutoData - Processing		
	Dropdown lists		
	Expandable list	True	
	Multiple selection	False	
4	Behavior		
	AutoValidate	EnablePreventFocusChange	
	ContextMenuStrip	(none)	-

→ MESSAGE: Shows this text message if the parameter "Show message box" is "True". The optional parameter {0} shows a result from the AutoData property area "Source".

→ ALWAYS OVERWRITE: if set to "True", an existing value in the target field will be overwritten.

→ SHOW MESSAGEBOX: if set to "True" the text from "MESSAGE" will be displayed.

→ TARGET FIELDS Enter the name(s) of the target field(s). In our example this is the field "Detail".

→ CLIPBOARD: The output value provided by AutoData is copied to the clipboard. As it is possible to use formats and formulas in the source field, this can be used to fill the clipboard with information to be processed further (outside of Act!).

This function replaced the previous Act! addon "**ContactCopy**".





### 8.3.2.2 Properties: AutoData - Layout

, rot	perties		Ð	
ł	New AutoData32 (AutoDa	ita3)	•	
	] ⊉↓   🖻			
$\triangleright$	Appearance		*	
⊿	AutoData - Input/Source			
	Source			
	Source description Term: {0}			
4	AutoData - Layout			
	FlatStyle	Standard		
$\triangleright$	Size of the AutoData windov	160, 270	=	
	Text	AutoData	-	
	TextAlign	MiddleCenter		
	Tooltip			
	Window position	1		

→ WINDOW POSITION: changes the position of the corresponding dropdown list in relation to the command button

→ FLATSTYLE: different styles of the button itself.

 $\rightarrow$  Size of the AUTODATA WINDOW: width and height of the button.

 $\rightarrow$  TEXT: The label that appears on the button itself

 $\rightarrow$  TEXTALIGN: text position of the button text.

→ TOOLTIP: text entered is shown on a yellow background as you move the mouse over it.

#### 8.3.2.3 Properties: AutoData - Input



→ SOURCE DESCRIPTION: headline of the source field dropdown list.

→ SOURCE: source field name, in our example this is the "Contact Status" field.





#### 8.3.2.4 Properties: AutoData – Processing

AutoData - Output		
Always overwrite	True	
Clipboard	False	
Message	<b>{0}</b>	
Refresh view	False	
Show message box	False	
Target fields	Detail	
AutoData - Processing	>	
Dropdown lists	AutoData Dropdown	
Expandable list	True	
Multiple selection	False	
▲ Behavior		
AutoValidate	EnablePreventFocusChange	
ContextMenuStrip	(none)	-

→ DROPDOWN LIST: name of the dropdown list created initially for our example. TIP: If more than one name is set here, a list of all available dropdown lists will be shown first.

→ EXPANDABLE LIST: dropdown list becomes editable if "True".

→ MULTIPLE SELECTION: dropdown list allows selection of more than one value from the list if set to "True".

The values are separated by a semicolon.

### 8.3.3 Using the AutoData command button in Act!

After having selected the value "Customer" for the field "Status", using the command button will show the following picture:

Contact	Steven Jackson	Term: Partner
Contact Status	Partner  AutoData	AutoData Dropdown Business Corporate Reseller
Detail		
		Cancel OK

The **AutoData3** button opens the dropdown list now showing ONLY the matching values based upon the first selection "Partner" and will only allow you to use those values.



# 9 AutoData in menus and toolbars

## 9.1 Introduction

The first way of using **AutoData** via command buttons has certain limitations, as VB.NET scripts can only be executed via a layout. To be able to use scripting independently, a second way of using **AutoData** is available. As an example, the ACTOptimum+ standard setup will insert a command button icon for the external application **TipTap** (see 14.2.1) into the contact detail toolbar.

## 9.2 Configuration of AutoData in menus and toolbars

Create an **AutoData** tool bar icon using ACTOptimum+ settings as described in 4.1. On the **General** tab an additional parameter "Icon" becomes available.

😲 AutoData settings	
AutoData allows you to run VB.NET Scripts	
General Source code Settings management	
Name	
AutoData	
Tooltip	
Executes Visual Basic. NET scripts	
Description	
Executes Visual Basic. NET scripts	
Menu	
Connected Menus	▼
File	•
Index	
-1 💓 ACTOptimum_AutoData	Icon-Selection
Separator	
Separator	
Shortcut	
	Delete shortcut
ок	
	Next
	OK Cancel



The **Source code** tab is the place to enter your VB.NET code.

😲 AutoData settings	
AutoData allows you to run VB.NET Scripts	
General Source code Settings management	
VB.NET Program Code	
1       □       Class AutoDataMenuApp         2       □       Public Shared Sub Main(ByVal ACTApp As Act.UI.ActApplication, ByVal ACTOp         3       '       Please enter your code here.	timum
4 5 End Sub 6 End Class	
Image:	•
🖻 Error list 📄 Protocol 🛷 References 💦 Contact fields 🚍 Company fields 👫 Group fields 📈 Opportunity fields	
Type Number Description Row Column	
	:
Replace all	Next
ОК	Cancel



# 10 RadiusSearch

### **10.1 Introduction**

Now that GPS data is used everywhere – in navigation systems, Internet services, route optimisation, etc. – it was a logical step to include this technology in Act!.

When planning visits, it makes sense to show all the other customers located near where you're going, or to select a target group of contacts located within a reACT asonable journey of a planned event.

These thoughts led to the development of the ACTOptimum+ function "RadiusSearch".

# **10.2 Configuration of RadiusSearch**

💿 RadiusSearch settings	The following parameters can be set for <b>RadiusSearch</b> :
Lookup for records situated in the periphery of an ZIP- Code	<b>Data area</b> Define the Act! main entity to be searched in.
General       Field selection       Settings management         Data area       Image: Contacts       Image: Contacts         Zip code-field       Image: Contacts       Image: Contacts         Country field       Image: Country       Image: Country	<ul> <li>ZIP code-field Name of the database field containing the ZIP code.</li> <li>Country field Name of the database field containing the country name.</li> <li>Note: More than one RadiusSearch can be set up per database, having different parameters.</li> </ul>
Next OK Cancel	



# 10.3 Using RadiusSearch in Act!

Using the function displays the following dialogue:

🔵 RadiusSearch	×				
Please enter a zip code and a country. Then the radius of the circle around the location in which to search.					
Location <u>Z</u> IP code	NE1 2ED				
<u>C</u> ountry	United Kingdom				
Radius <u>R</u> adius	10 🚔 km In Miles: 6.21				
	OK Cancel				

The defaults for the Zip code and country will be taken from the current contact/company. Note: The quality of the lookup results is dependent on correct values for the Country field.

The geodata database delivered with ACTOptimum+ currently includes German and English names for following countries : Germany (Deutschland), Austria (Österreich), Switzerland (Schweiz), Liechtenstein (Liechtenstein), Belgium (Belgien) and the USA (Vereinigte Staaten).

The radius around a given ZIP code can be any value between 3 and 1000 kilometers.

Clicking **OK** opens the progress window:

🎯 RadiusSearch	
Validating the zip code 'NE28 6' In the Country United Kingdom	
Found until now Contacts: 4	
Cancel	

After a few seconds **RadiusSearch** will display a lookup. Please watch the status bar!

You can then apply any additional lookups to narrow or add to your search as normal.



# 11 ActPlus

### **11.1 Introduction**

From Act! 12.0 upwards, there are four separate main data areas: **Contacts – Companies – Groups – Opportunities.** At the next level down, the following sub-data areas are provided as standard: **Notes – History – Activities**.

Quick and user-friendly navigation and linking of individual information units (Notes, History, Activities) to the higher-level main data areas (Contacts, Companies, Groups, Opportunities) has been regarded as a key priority.

With its special jumping and linking capabilities, **ActPlus** greatly enhances speed and ease of use in the day-to-day running of your Act! application.

## **11.2 Configuration of ActPlus**

No options for ActPlus.

# 11.3 Using ActPlus in Act!

### 11.3.1 Extended lookup menu for companies and groups

ACTPlus - lookup enhancements are provided for company list and group list views.

Companies «	🚊 Detail View 🝺 List V	iew 📄 📑 .	e 🛎 🚊 Q. 🛙			
Lookup	Edit Mode Include Divisions					Lookup – selected
Company Field:	Company /	Phone	Address 1	Address 2 City		companies Lookup
Company 👻	Ace Pet Store Franchises	(423) 555-1 <u>221</u>	005 Cakby St	D D Doy 122 Europo		
Contains:	AVB Enterprises Best Lender Financing	(623) 898-1 (847) 555-1	New Compan <u>y</u> New Di <u>v</u> ision			highlighted company list entries.
Go	Black Forest Baking	(211) 554-5	Duplicate			
More Options 👻	Boomer's Artworx Brandee's Bakery	(602) 555-4 (480) 555-2	<u>D</u> elete		2	Lookup – omit
L Contacts	Brushy's Golfing World CH Gourmet Imports CH Holding	Ż	Edit Company Acce Lookup - selected o	companies <mark>1</mark>		<b>selected</b> Lookup all companies
4 Groups	CH TechONE	(212) 555-2	Lookup - All except the selected companies 2 Lookup - contacts of the selected companies 3			except highlighted
Companies	CH TechONE - Accounting CH TechONE - Administratio		Create <u>L</u> ookup		-	ones.
📩 Calendar	CH TechONE - Sales Circle Photography	(212) 555-2 (214) 555-4	Insert Company <u>N</u> o Record Company H		3	Lookup – contacts of
🕑 Task List	Freemont Corp	(735) 542-1	Attach File			selected companies
🚱 History List	Green Plastics Griping International	310-987-450 (678) 789-4	<u>M</u> ove		-	Creates a lookup of all
🚳 Opportunities	Jake Flakes Inc. Making Technology Co		Company Membership			contacts linked to the
Emarketing	Mercury Production Manager		Export to Excel			selected companies as
🐂 Marketplace	MI Business Plan, Inc. MiniSoft	(610) 898-3 212-598-45	Customi <u>s</u> e Columns		_	a contact list.
E Reports	Mutthound Enterprises	(603) 001 0000	Print Company List	Dhaoniy		

The status bar (bottom line of the application window) shows the number of matching company records.



### **11.3.2 Additonal navigation shortcuts in notes and histories**

Business Card	d	Address		Record <u>Hi</u> story
Contact	Angela Ives	Address 1	67	Attach File – Delete Selected
Company	Ace Pet Store Franchises	Address 2		Make History P <u>r</u> ivate Make History P <u>u</u> blic
Title	Music and Lighting Coordina	<ul> <li>City</li> </ul>	Bla	<u>F</u> ilter History
Department		<ul> <li>County</li> </ul>	Lar	Customi <u>s</u> e Columns
Salutation	Angela	Post	BP:	Pr <u>i</u> nt History
Salutation	Aligeid	POSL	L de la de l	Link to current contact (Angela Ives)
Activities Opportunitie	es History Notes Documents	Groups/Companies Secondary	Conta	Link to the current group Link to current company (Ace Pet Store Franchises)
Dates: All Dates	<ul> <li>Types: All</li> </ul>	<ul> <li>Keywork</li> </ul>	# 🗌 🐥	Link to the current opportunity
Date T	ïme Result	Regarding & Details		Link to the substed opportunity
04/03/2015 1	4:47 Contact Linked	Linked to company Ace Pet Store Franchises		Link to the company of the contact (Ace Pet Store Franchises)
27/08/2014 1	9:21 Opportunity Wor	<ul> <li>Replacement Parts for Portab Units \$300.00 Closed - Won Current Client Relationship Thursday, August 27, 2009 12:00:00 AM</li> </ul>		Go to Contacts (1)     1       Go to groups (0)     2       Go to companies (1)     3       Go to opportunities (1)     4

The context menu of a selected note or history contains 4 additional ActPlus – Go to items.

- Go to contacts creates a lookup of all related contacts of this history
- **2** Go to groups creates a lookup of all related groups of this history
- **3** Go to companies creates a lookup of all related companies of this history
- **Go to opportunities** creates a lookup of all related opportunities of this history

The two dialog boxes for Edit History and Edit Note will show a new button named Go to ....

C Edit History								
<u>T</u> ype:	Other <u>  R</u> esult: Opportunity Won <u> </u>							
Contact:	Ives, Angela [Ace Pet Store Franchises]							
Date:	27/08/2014  Time: 19:21  Duration: 0 minutes							
Attachment:	Attach 🗸							
Share With:	Ace Pet Store Franchises [CMP]; A1 Services of UK-Replacement Parts for Portable Units [OPP]							
Record <u>M</u> anager:	Emst Anderson 🔽							
<u>R</u> egarding:	Replacement Parts for Portable Units \$300.00 Closed - Won							
Details:								
$\blacksquare$								
Current Client Relationship Thursday, August 27, 2009 12:00:00 AM								
Pri <u>v</u> ate	Eollow-up							



Clicking the button wil open a new context menu allowing you to go directly to a linked contact, company, group or opportunity.

1	Go to Contacts (1)
圓	Go to companies (1)
0	Go to opportunities (1)

### 11.3.3 Additonal navigation shortcuts in activities

The context menu of an activity will show additional menu items allowing you to perform direct lookups of linked contacts, companies, groups or opportunities.

Task List «	🕫 Q 🔲 🖹				
Lookup	All Dates 🔹 Types: All 🔹 Priorities: All	elect Users			
Contact Field:	Type 📿 Date 🕢 Time Priority Scheduled With Regarding				
Contact Contains: Go More Options	Image: Operation of the state of t	•			
L Contacts	Image: Second system         08/01/2014         01:30         Lear Multiple Activities           Image: Second system         08/01/2014         22:00         Lear Multiple Activities	_			
Companies	Image: Construction         Image: Construction           Image: Constructin         Image: Constructin	_			
Calendar	Image: Prince Flack List         End of the second				
G History List	■         14/01/2014         00:30         ■           ■         15/01/2014         01:30         ■         ■           ■         16/01/2014         01:30         ■         ■           ■         16/01/2014         01:30         ■         ■				
<ul><li>Opportunities</li><li>Emarketing</li></ul>	■         16/01/2014         18:30         ↓         Link to current company (Ace Pet Store Franchises)           ■         17/01/2014         00:00         ↓         Link to the current opporte ity           ■         17/01/2014         20:30         ↓         □         □	_			
📜 Marketplace	Image: Second				
🕐 Dashboard	Image: Constraint of the second se	iunt ne Order			

- **Go to contacts** creates a lookup of all contacts linked to this activity.
- **2** Go to groups creates a lookup of all groups linked to this activity.
- **3** Go to companies creates a lookup of all companies linked to this activity.
- **Go to opportunities** creates a lookup of all opportunities linked to this activity.



### 11.3.4 Extended linking options for notes, histories or activities

Some more additions to the context menu will appear if ActPlus is enabled.

ActPlus – link to allows you to link a note, history or activity to current contacts, groups, companies or opportunities. The selected item will show "missing links" in black, existing links are grayed out.

Contacts «	👤 Detail View 💵	List View 🕅 🕅 1 of 1	H H	🛚 📔 🖷 🚨 🔺 🖉 🥒 💡 🛛 Basic Contact Layout - 1024:	x768 •
Lookup  Contact Field:	Business Card			Record <u>Hi</u> story Attach File	
Contact 🗨	Contact	Angela Ives			tatu
Contains:	Company	Ace Pet Store Franchises		Make History Public	rred
More Options	Title	Music and Lighting Coordina	[	<u>F</u> ilter History Customice Columns	
۲ ۲ ۲	Department		Į	Pr <u>i</u> nt History	est
L Contacts	Salutation	Angela	t	Link to current contact (Angela Ives)	ail
🚣 Groups	Activities Opportunities History Notes Documer's (			Link to group (Customers) 2 Link to current company (AVB Enterprises) 3	Т
📋 Companies	Dates: All Dates   Types: All			Link to opportunity (OPP0000009NAM) 4 Link to the selected opportunity 5	Jser
📩 Calendar		Time Result	ļ÷	Link to the company of the contact (Ace Pet Store Franchises) 6	h
🗹 Task List			<b>-</b>	Go to Contacts (1)	
C History List	27/08/2014 1	19:21 Opportunity Wo	₩ •	Goto groups (0) Go to companies (1)	tore ss[C
🚳 Opportunities			÷	Go to opportunities (1) 200-00 AM	ient
Emarketing					

- Link to current contact
- 2 Link to current group
- 3 Link to current company
- 4 Link to current opportunity
- 5 Link to selected opportunity. Selected opportunity means an opportunity that was previously selected from the list of opportunities on the opportunities Tab of a contact or company by doing one left click (the item is then highlighted in blue).
- 6 Link to company of the current contact

N.B.: "current" means a contact, group, company or opportunity that is a result of the corresponding previous lookup.


### 11.3.5 ActRemote-Link

The general context menus of contacts, companies, groups and opportunities contain another addition provided by **ActPlus** and this is called **Copy Link**.

<u>N</u> ew Contact
Duplicat <u>e</u> Contact
<u>D</u> elete Contact
Schedule
Write
Send <u>v</u> Card
Inser <u>t</u> Note
<u>R</u> ecord History
<u>A</u> ttach File
R <u>u</u> n Smart Task
New <u>O</u> pportunity
Add Contact to <u>G</u> roup
Add Contact to Compan <u>y</u>
Ed <u>i</u> t Contact Access
Pr <u>i</u> nt Contact
Copy contact link

This function copies a link to the selected contact, company, group or opportunity to the clipboard. Inserting this link into Word or Excel will allow you to click the link to open the corresponding Act! record similar to a hyperlink.

L	· 2 ·   · 1 ·   · <del>2 ·   · 3 ·   · 4 ·   · 5 ·   · 6 ·   · 7</del>
- 1	Please click here to display the contact in Act!. Ctrl+Click to follow link
-	Angela Ives
-	
1	
2	



# 12 ActRemote

# 12.1 Introduction

**ActRemote** is an interface technology that enables external COM applications (such as Visual Basic, VBA, VB Script) to communicate with the .NET-based program Act!

In the Act! environment, examples of COM applications include **CustomInfo** and **TipTap** 

# **12.2 Configuration of ActRemote**

The basic configuration of ACTOptimum+ has the corresponding item **ActRemote** set to "enabled". No other settings are necessary.

## 12.3 Using ActRemote in Act!

ActRemote has no "visible" functional items.

## 12.4 ACTRemote Add-In for Outlook

This Add-In for Microsoft Outlook adds the tab "ACTRemote" to Outlook. Depending on which window of Outlook you're currently in, the ACTRemote connector will provide different, new functionality to interact with the Act! software.

### 12.4.1 The "ACTRemote" tab in the main Outlook window

0 📑 🤊	<b>-</b>			Int	box - testuser@act7.de - Microsoft Outlook
File	Home Send,	Receive Folder	View	Add-Ins	ACTRemote
Ŷ	Lookup sender Lookup recipient	$\ge$			
Record as Act! history	E-mail addresses	Show			
-	rent e-mail	Act! Outlook Service			

### 12.4.1.1 Icon group "Current e-Mail"

Using these icons you can start a lookup in Act! to search for a contact based on the currently marked email or attach an email to the contact currently active in Act!.

#### 12.4.1.2 Icon "Lookup sender"

Starts a lookup in the Contact area for the email address and, where applicable, the alias of the sender of the currently marked e-Mail.

#### 12.4.1.3 Icon "Lookup recipient"

Allows you to select one of the recipients of the currently marked e-Mail and start a lookup in the Contact area of Act! for that e-Mail address.

#### 12.4.1.4 Icon "E-mail addresses"

Starts a search for all e-Mail addresses in the currently marked e-Mail's body. You can select one e-Mail from the resulting list. A lookup for the selected e-Mail address will then be started in the Act! Contact area.



#### 12.4.1.5 Icon "Record as Act! history"

The currently selected e-Mail will be recorded as a history in the currently active contact in Act!. The following dialog will be shown:

🐣 Record e-ma	ail as a history to the current Act! contact	
E-mail		
	5, from Microsoft Outlook look-Testnachricht	
Act! contact		
Chris Huffmar Chris@CHTe	n, company CH TechONE chONE.email	
Act! database	- and credentials	
Server	DEMOPC3	
Database	ACT2015Demo	
Username	Chris Huffman	
Password		
Act! history		
Format	Use the subject and the whole e-mail as an attachment	•
	Record as private history	
Remembe	r my choice	
Recor	d history Cancel	

This dialog gives you all the relevant information and options to record an e-Mail as a history in Act!. You can select the format in which to record and make the history "private". By selecting "Remember my choice" the options you selected will be stored as your preferred default and used for the next time you're recording an e-Mail.

#### 12.4.1.6 Icon group "Act! Outlook Service"

The "Act! Outlook-Service" is a piece of software running in the background, which is responsible for creating the history items in Act!. Every time an e-Mail gets recorded as an e-Mail in Act!, this program is the one doing the task in the background. It's part of the Act! software itself and is implemented by the process "Act.Outlook.Service.exe".

The icon "Show progress" opens the status window of the program. Technically this can be done through the icon in the task bar, but that's easy to overlook and it's sometimes hidden by the system. This function will no longer be displayed as of Act! version 20.1.



### 12.4.2 The tab "ACTRemote" in Outlook's the E-mail creation window

😰 I 🛃 I	9 (2 4 4	<b>-</b>						Untitled - Message (HTML)
File	Message	Insert	Options	Format Text	Review	Add-Ins	ACTRemote	
2	22							
То	СС							
Current A	ct! contact							
	То							
Send	Cc							
	Subject:							

#### 12.4.2.1 Icon "To"

The e-Mail address of the current contact in Act! will be added to the "To" field of the e-Mail.

### 12.4.2.2 Icon "CC"

The e-Mail address of the current contact in Act! will be added to the "CC" field of the e-Mail.



# 13 BrowserTab

# **13.1 Introduction**

The initial idea of **BrowserTab** was to add custom tabs showing information coming from web services. During the development of this, it became clear that it would also be possible to show any kind of external data as long as the data comes "through" a web browser (Example 2 will show this).

Besides that, BrowserTab is also the "display interface" for CustomInfo.

**BrowserTab** can be configured to "read" Act! field contents, paste them into a URL and display the contents of a web page based upon the pasted criteria. Example 1 will show how to do this.

# 13.2 Configuration of BrowserTab

### 13.2.1 General Tab

BrowserTab settings	Tab name for the new
Integrating a custom URL-Call in a Tab in the details views	Internet service.
Contact view	2 Tab description
General URL Settings management Name Bing Map Search	3 Enabling this option will refresh the Tab contents when changing the record in Act! This can have a negative impact on the Act!
2 Contact Location Display in Bing Map Search	performance, so should be tested if it is to be used.
Options 3	4 If the above refresh option is set, the URL will be refreshed and the browser Tab will reload.
<ul> <li>Freifesh Orke and reload page</li> <li>Only page reload (recommended for CustomInfo)</li> <li>Convert Field value to UTF-8 format</li> <li>Display browser errors (recommended for file:-URL)</li> </ul>	5 If the above refresh option is set, this option will only reload the page.
OK Cancel	6 Enabling the UTF-8 format ensures that special characters in the copied field contents (such as Ä, Ö, Ü etc.) are transferred

7

Will show browser errors.



### 13.2.2 Tab - URL

Before linking a new URL with an Act! tab, first call up the URL in your web browser.

In the following example we use Bing Maps as an illustration.

### 13.2.2.1 Step 1 (preparatory step in web browser)

Enter the URL: **www.bing.com/maps** in your web browser to go to Bing Maps, then perform any standard search (in the example below, we have searched for the location of the Swiftpage Office in the UK)



- The Internet service searches for the two entries. The entries for these two search fields can be found in the URL for the Internet page.
- 2 The URL can then be copied elsewhere. Note that it contains the two search terms we have used ("Quorum Business Park" and "Newcastle").

The displayed address with the relevant information is now copied to the clipboard. It might be useful to copy it into Microsoft Notepad:





#### 13.2.2.2 Step 2 (configure the URL in BrowserTab)

BrowserTab settings
Integrating a custom URL-Call in a Tab in the details views
Contact view
General URL Settings management
URL1
efault.aspx?q={!ACT.contact.Address 1}+{!ACT.contact.City}&mkt=en&
Fields       City       Paste       2
Next
OK Cancel

You now take the URL content you copied to the clipboard and paste it into the URL area of the configuration window.

- Here is the URL that has been pasted in. Note that the Search terms we used before have now been replaced with Act! fields.
- 2 This dropdown allows you to access any of your Act! fields and use these to replace your search terms. So now, instead of specifically searching for "Newcastle", the BrowserTab will search for the city in the Contact record you are looking at. We will see this demonstrated below.

The fixed search terms of your URL in the clipboard

- Quorum Business Park
- Newcastle

are now replaced with a special syntax that is automatically generated when you Copy in the appropriate Act! fields (in this case, "Address 1" and "City")



# 13.3 Using the BrowserTab

### 13.3.1 Example 1 (dynamically updated Internet service)

After your new syntax has been stored, the new tab appears in your Act! application, offering you instant access to the newly embedded URL.

Contacts «	📕 Detail View 🕊 List View 🗰 🕅 2 of 202 🕨 🛏 🗎 😤 🧟 💵 🐼 🏖 🖉 💡 Basic Contact Layout - 1024x768 💌 🔏	
Lookup	Business Card Address Status	*
Contact Field: 📰		
Contact 🗾	Contact John Smith Address 1 15 Searcest ID/Status	=
Contains:	Company Address 2 Referred By 💌	1
Go	Title City Newbiggin by the Sea 💌	
More Options	Department County Latest Activities	-
L Contacts	Activities Opportunities History Notes Documents Groups/Companies Secondary Contacts Relationships Social Updates Web Info Personal Info Contact Access User Fields Timeline Google Maps Bing Map Search	Ę
🤽 Groups		
Companies	WEB IMAGES VIDEOS MAPS NEWS MORE	
💳 Calendar	🕨 bing 15 Seacrest Newbiggin by the Sea 🖉 Sign in 👻 🧔	
🗹 Task List		
C History List	♦ Directions ★ My places Road → Bird's evel → Traffic 🕴	
🚳 Opportunities	Directions Save Zoom Send	
Emarketing	Newbiggin-by-the-Sea,	
📜 Marketplace	Northumberland	
E Reports	55.186300,-1.508640 Newbiggin-by-the-Sea	4
🚯 Dashboard	Directions - Email - More Not what you wanted?	
Q. Search	Newbiogin-by-the-Sea is a small town in	
A Welcome	Northumberland, England, lying on the North Sea coast. Once an important port for shipping grain and a coal mining town if is still a small fishing on participation use of 1000 feet 500 m	
×	mining town, it is still a small fishing port making use of 1000 feet 500 m e 2015 Notes the still a small fishing port making use of 2015 Notes the still a small fishing port making use of	-
Lookup: All Contacts	David United States Contract C	



### 13.3.2 Example 2 (display Windows Explorer folders)

It is also possible to use BrowserTab to display the contents of a shared folder.

To do this you will require the UNC path of your shaered folder (so this will be displayed in the format \\COMPUTER NAME\FOLDER NAME ). You can then set up a BrowserTab as per the above instructions, but when pasting in your URL, you will instead paste in the UNC path.

In the example below, I have used the UNC path of my shared databases folder (On my PC, this is <u>\\NCL-10000071\Databases</u>).

You can also use the Windows environment variables like %userprofile% in the URL.

URL example: file://%userprofile%\MyProjects\

Contacts «	Detail View 🖊 List View 서 K 2 of 2	02 🕨 🍽 💾 태	3 I 🐼 🎍 🖉	💡 🛛 Basic Contact Lay	yout - 1024x768 💌 🎢
Lookup	Business Card	Address	5		Status
Contact Field:	Contact John Smith	Address 1	15 Seacre	đ	Status ID/Status
Contact		Address 2		~	Referred By
Go	Company				кетентей ву
More Options +	Title	▼ City	Newbiggin	by the Sea 💌	
۰۰۰۰۰ ۲	Department	▼ County		•	Latest Activities
L Contacts	Bing Map Search		Constant Contrata   D	terrestres Constituted a	tes Web Info Personal Info Contact Access User Fields Timeline Databases Folder
aroups	Activities Opportunities History Notes Documen	ts Groups/Companies	Secondary Contacts   Re	sationsnips   Social Opdat	tes Web Into Personal Into Contact Access Oser Pielos I Imeline Dotaboses Folder
📋 Companies	Name	Date modified	Туре	Size	
🚞 Calendar	Demospare-database files	04/03/2015 08:09	File folder		
🗹 Task List	<ul> <li>ACT2015Demo</li> <li>Demospare</li> </ul>	04/06/2014 08:26 04/03/2015 15:55	PAD File ADF File	1 KB 37,696 KB	
C History List	Demospare	04/03/2015 15:55	.alf	5,184 KB	
🚳 Opportunities	2 Demospare	04/03/2015 08:08	PAD File	1 KB	
Emarketing					
📜 Marketplace					
Reports					
🚯 Dashboard					
Q. Search					
Welcome					
» •					
Lookup: All Contacts	Ready.				Chris Huffman



# 14 ТірТар

# 14.1 Introduction

Whilst a telephone link does already exist within the Act! System, TipTap expands on the existing functionality and provides additional useful features, such as call recognition and call history recording.

These were the main priorities during the development of TipTap:

- Caller identification via all telephone fields stored in Act!, also based on probability (when caller calls from extension) and displays in a separate window (Call Monitor).
- Ability to pinpoint the calling contact in Act!.
- Logging of callers in a caller list, to be able to search for the contact at a later time.
- Logging of additional information relating to each call (e.g. date, time, duration, country, city, call status) and saving in an Access database for later analysis.
- Logging of call in the Act! history directly from within TipTap.

# 14.2 Configuring TipTap

TipTap is an external application and has a separate configuration process.

### 14.2.1 Step 1 - Integration of TipTap into Act!

After ACTOptimum+ has been installed, launch the application via

### All Apps → Melville\_Schellmann → ACTOptimum+ → TipTap

PLEASE NOTE: You must set up your "Phone and Modem" settings within the Windows Control Panel before setting up TipTap. If you do not, when you attempt to launch the program, you will receive the following error:



If you click OK, or if you have already completed the Phone and Modem details correctly before you launch <u>TipTap you then see a pop-up window asking you to confirm the choice of installed TAPI driver</u>.



#### Confirm by clicking OK



**Note:** Another way of starting TipTap is through the Act! application. The contact detail view has a new button for calling up TipTap.

•	Call Meeting	To-Do	Note	<b>Q</b> History	E-mail	•	Search	Go *
<b>H H</b>	43 of 202 👌 🔛 🗎	📑 🧶 🕹	💵 🖉 🎙 🖪	asic Contact Layo	out - 1024x7	68 -		
	Addr	ess			Stat	us	Starts TipTap on top and displ	ays the numbers of the current contact



### 14.2.2 Step 2 - TipTap settings – TAPI selection

Once you have clicked OK to the previous message, the following dialogue screen is displayed.

🬈 Tip Ta	p settings					х
TAPI	Window Popup	) Search cac	he∫ACTR	emote   Sp	eed-dial buttons	_
Prov	vider					
	runc01				<u> </u>	
	Properties	Info				
2	Use idle status as	disconnect ev	rent			
3	Create log file		Sho	w	Delete	
4	Use own calling r	ule	Dial prefix	0		
5	Suppress the atta	iching of numb	ers from th	e Swyx TAF	PI driver	
	er number move prefixes for	6	Add pref	fixes for		
	incoming call.	0	🗌 🗆 inco	ming call.	0	
	outgoing call.	0	🗌 outg	oing call.	D	
			К	Cancel	Apply	

Select the corresponding TAPI driver for the telephone handset you are using.

The remaining TAPI settings are:

- Choice of TAPI driver and possibility of changing some of the settings. The "Infos" button displays all the TAP functions supported by the driver.
- If the end of your call is not recognized (no duration is displayed), in many cases it helps for the idle status of the TAPI driver to be interpreted as "Disconnected". This ensures the correct duration of the call is displayed.
- **3** For the analysis of problems with a TAPI driver, all TAPI events can be recorded in a log file and this can then be displayed or deleted.
- 4 If TipTap is to ignore the Windows dialing rules (System control Telephone and modem options), you can enable the option Use own calling rule here and specify a prefix that will always be put in front of any number being dialed.
- In case a TAPI driver from the manufacturer Swyx is used, it may happen that the TAPI driver adds some digits into the Tel no. This special option attempts to "cure" the inherent problem of the driver by trying to find the bogus digits and removes them. In case the function has rectified the Tel no. the "Memo" column of the main window will display the change.
- If the phone numbers in the table above (call history) are not displayed correctly, you can adjust this by adding or deleting prefixes. For example: in the incoming calls field, the TAPI driver lists the number of the caller like this "004012345". If you enable **Remove prefixes while** and **incoming call** then enter zero, the number will be displayed correctly as "04012345". In this way it is possible, depending on whether the call is incoming or outgoing, to add or remove as many characters or digits as you like.



### 14.2.3 Step 3 - TipTap settings – window view

In the **Window** tab you specify the program behavior and various display options.

Search cache	ACTRemote	Speed-dial buttons
p		
when minimized 🔰	2	
ncoming calls	3	
er than upon startup	-4	4 weeks 🔍 🗸
all history list		
~	Move up	
	-	
	5	
	5	
	5 Move down	
	p when minimized acoming calls er than upon startup all history list	p   when minimized 2 icoming calls 3 er than upon startup. 4 all history list

- Defines whether the application is minimized immediately on starting.
- 2 Specifies whether **TipTap** is displayed in the toolbar.
- 3 Here you choose whether **TipTap** should be brought to the foreground on incoming calls.
- 4 Here you can define the age at which entries in the call history are to be deleted. This automatic deletion process is performed on every start or everytime the search cache of **TipTap** is refreshed.
- 5 Choose information that you want **TipTap** to display for every call. The information copied and subsequently available depends on the TAPI driver used. Use the **Move up**, and **Move down** buttons to specify the order in which the call information is displayed.



### 14.2.4 Step 4 - TipTap settings – Popup view

In the **Popup** tab other options can be set for the way in which TipTap is initiated for incoming calls. The popup window appears at the bottom right edge of the desktop and shows information about the call.

🧨 TipTap settings	$\times$
TAPI Window Popup Search cache ACTRemote Speed-dial buttons	
Options	
Display time in seconds 3 🗸	
Popup for incoming calls	
Popup for outgoing calls 3	
If Popup and the caller is detected, show in Act! automatically.	
✓ Voice output for calls 5	
On mouse click	
Always show call history	
O Show detected caller in Act! 7	
Accept or cancel call 8	
OK Cancel Apply	

- Defines how long the pop-up window is displayed for.
- 2 If this box is checked, a pop-up window appears bottom right for incoming calls.
- 3 With this box checked, a pop-up window appears bottom right for outgoing calls.
- 4 If the pop-up appears and an Act! contact has been recognised, this contact is automatically displayed in Act!.
- 5 When the pop-up window is displayed, the caller is output via Windows own speech synthesizer.
- 6 Clicking on the pop-up window displays the call history.
- 7 Clicking on the pop-up window searches for the incoming contact in Act! and puts it on the screen immediately. This is assuming that caller recognition is enabled in the Act! application.
- 8 If you click on the pop-up window, the incoming call is accepted.



### 14.2.5 Step 5 - TipTap settings – Search Cache

In the **Search cache** tab you can specify one or more Act! databases whose telephone fields will be used for caller recognition purposes. Act! reads all the phone numbers from the Act! database into a search cache in the computer's memory.

🖊 TipTap settings 🛛 🗙 🗙
TAPI     Window     Popup     Search cache     ACTRemote     Speed-dial buttons       Data source(s)
Name     Options     Add       ACT!, DEMOPC3, ACT2020Demo     Remove
<ul> <li>Add missing 0 when reading numbers from source.</li> <li>Do not show fax numbers</li> <li>Do not show fax numbers</li> <li>Do not show fax numbers</li> <li>Dial the current Act! number by pressing the enter key</li> </ul>
OK Cancel Apply

- Clicking on the **Add** button opens a popup window for entering an additional Act! database. Click on **Delete** to delete an Act! database from the search cache.
- 2 Use this option if the initial zero is not entered in the dialing codes for phone numbers in the Act! databases (40... instead of 040...). A leading zero will then be added to these numbers, so that an incoming number such as "040...." can be located in the search cache.
- 3 Activate this option if you don't want to see fax numbers of the current Act! contact.
- 4 If the telephone numbers of the current Act! record are displayed in the lower area of the TipTap window (search cache), double-clicking or pressing the Enter key for a selected entry will dial this number and not display the record in the Act!(Standard).

If you want to add additional databases as data sources, simply enter the respective server name of the stored database, along with the name of the Act! database.

L

🧨 Add data sou	rce	$\times$
Act! database		
Server name	MSPC11	]
<u>D</u> atabase	ACTDemo	]
	Current Act! Database	
<u>O</u> ptions	2	]
(No options fo	r standard necessary)	
	OK Cancel	

- If you have the actual Act! program opened, you can add the database you are currently using into TipTap by clicking the **Current Act! database** button. To use this, the **ActRemote** function must be enabled in the **ACTOptimum+** settings.
- Under options you can enter: ACTCompanyFieldRecordLocation=DIVISION

Explanation: Specifies an alternative Act! company field if the REGION field was deleted.



### 14.2.6 Step 6 - TipTap settings – ActRemote

In the penultimate tab, the link to the Act! application is set. You do not usually need to change anything here.

<sup>7</sup> TipTa	ap settings	;				
TAPI	Window	Popup	Search cache	ACTRemote	Speed-dial buttons	
Con	nection data	3				
۲	Standard					
0	User define	ed URL				
	tcp://192	168.1.38	8:51370/ACTOpti	mum.ACTRemo	ote_rs	
			OK	Car	ncel Apply	

The link to the Act! application is needed to

- ✓ Perform a search on the calling contact in the Act! application.
- ✓ Create a call history for the caller in the Act! application.
- ✓ Display the phone numbers of the current Act! contact.

To ensure a smoothly functioning link to the Act! application, please make sure that the **ACTOptimum+** function **ActRemote** has been enabled in the basic **ACTOptimum+** settings.

The user-defined setting is only required if you want to access an Act! database that is located on a terminal server. More information can be found in the **ActForum.de** under:

http://www.melville-schellmann.de/actforum/viewtopic.php?t=4417



### 14.2.7 Step 7 - TipTap settings – Speed dial keys

In the last tab of the TipTap configuration you can assign phone numbers for up to ten speed dial keys (0-9).

🧨 TipTa	ap settings					Х
TAPI	Window Popup	Search	cache	ACTRemote	Speed-dial buttons	
	Phone number		Descri	iption		
1	08452680220		Act!	Support		
2			1			1
<u>3</u>						1
4						1
<u>5</u>						1
<u>6</u>						1
Z						1
<u>8</u>						
<u>9</u>						
<u>0</u>						
			ОК	Ca	ncel Apply	

In the left column enter the phone number and in the right column a description. Every complete entry leads to an additional icon with the respective number being displayed in the toolbar in the main window of TipTap. You can then click on this icon to call that phone number.

Once you have completed these 7 steps, save your configuration setting by clicking on OK.

**TipTap** now automatically reads the available phone numbers into the search cache and brings the application up in the foreground.



# 14.3 Using TipTap

Below you can see the TipTap application screen which we will now look at in more detail.

lumber	Date		Duration	Status	Countr	iry	Region	Name		Add. Info	Note
04102803	650 07.03.2016	12:05:42	00:01:16	Call receive	ed Germ	nany	Ahrensburg	Robert Sche	llmann	Melville-Schellmann GbR	
04651870	266 03.03.2016	13:59:24	00:00:20	Call receive	ed Germ	nany	Westerland	Ulli König		Weststrandhalle List	Bei König am We
nten 🕹 🖉 🖉	266 03.03.2016	10:58:31	00:00:04	Call receive	ed 💙 Germ	nany	Westerland	Ulli König		Weststrandhalle List	
🦑 🔔 00414441:	29111 03.03.2016	10:38:02	00:00:00	Call receive	ed Switz	zerland	Zürich	Gretel Muste	rfrau	Stadt Zürich	Organisation und
🗟 🚨 00434876	8500 03.03.2016	10:25:47	00:00:08	Call attemp	ted Austri	ria	Kals	Peter Tembl	er	Erzherzog-Johann-Hütte	Erzherzog-Johann
🦑 🔔 00412796	72264 03.03.2016	10:16:36	00:00:04	Call receive	ed Switz	zerland	Saas Fee	Hans Muste	mann	Stiftung Hömlihütte Zermatt	Stiftung Hömlhütt
			3								
-			3								
Similar numbers wi		Α	3 Add. Info		Field S	Source					
Similar numbers wi Number	th 4102803	- I.	Add. Info Melville-Schelln	nann GbR			PC11, ACT20	)15Demo			
Similar numbers wi Number & 4102803650	th 4102803 Name	n N			Phone A	ACT!, MS	PC11, ACT20				
Similar numbers wi Number 4102803650 4102803650	th 4102803 Name Robert Schellmann	n M N	Melville-Schelln	nann GbR	Phone A Phone A	ACT!, MS ACT!, MS		15Demo			
Similar numbers wi Number 4102803650 4102803650 41028036520	th 4102803 Name Robert Schellmann Axel von Melville	n N N	Melville-Schelln Melville-Schelln	nann GbR nann GbR	Phone A Phone A Phone A	ACT!, MS ACT!, MS ACT!, MS	PC11, ACT20	)15Demo )15Demo			
Similar numbers wi Number 4102803650 4102803650 4102803650	th 4102803 Name Robert Schellmann Axel von Melville Max Mustermann	n N N	Melville-Schelln Melville-Schelln	nann GbR nann GbR	Phone A Phone A Phone A	ACT!, MS ACT!, MS ACT!, MS	PC11, ACT20 PC11, ACT20	)15Demo )15Demo			
Similar numbers wi Number 4102803650 4102803650 4102803650	th 4102803 Name Robert Schellmann Axel von Melville Max Mustermann	n N N	Melville-Schelln Melville-Schelln	nann GbR nann GbR	Phone A Phone A Phone A	ACT!, MS ACT!, MS ACT!, MS	PC11, ACT20 PC11, ACT20	)15Demo )15Demo			
-	th 4102803 Name Robert Schellmann Axel von Melville Max Mustermann	n N N	Melville-Schelln Melville-Schelln	nann GbR nann GbR	Phone A Phone A Phone A	ACT!, MS ACT!, MS ACT!, MS	PC11, ACT20 PC11, ACT20	)15Demo )15Demo			

The following program functions can be initiated by clicking on the icons in the top toolbar:

- Click on this icon to enable TipTap.
- This icon takes you to the settings for TipTap.
- G (F5 key) Clicking on this icon refreshes the phone numbers and updates the search cache, as well as deleting old entries in the call history (see 14.2.3)
- (F8 key) You can use this icon to manually type in a number, which the program will then dial. If text was copied into the cache beforehand, any phone number contained within it is automatically taken as the number to be dialed. If an active connection is selected in the call history, the window dials the numbers entered as DTMF dialtones.

The following three buttons belong to the current selected item in the call history list:

- (F1 key) Show contact in Act!. Brings the Act! application window to top of the desktop.
- (F7 key) Create a history entry in Act!.
- (F4 key) Dial number of the currently selected item in the call history list.

Followed by the speed dial buttons:

- (Alt key + 1 key, etc.) This is speed dial key 1. The program dials the number stored and allocated to speed dial key 1 in the configuration (see 14.2.7).
- This icon displays information on the TipTap program.



The following icons may be displayed during an active conversation or an outgoing/incoming call:

- (F9 key) End call / hang up.
- (F9 key) Accept call
- Park call (availability depends heavily on TAPI driver.)
- 🔎 Retrieve call
- 2 The individual calls are displayed in the top half of the monitor window. Here TipTap automatically detects whether the call is incoming or outgoing, and independently logs whether the call was accepted or ignored. It also records when the call is ended and the overall duration of the call. Various performance features depend in each case on the TAPI driver used. The following states are detected:
  - New incoming call
  - 1 New outgoing call
  - Active connection (conversation)
  - Call was parked
  - Call accepted and conversation held
  - Incoming call not accepted
  - Call made and conversation held.
  - Call attempted, no answer
- For each caller displayed above, optional short texts can be entered which are then then included in the subsequent logging of the details in the history entry. Simply click on the line to enter a note (F2 key). If you use the Internet search (F3 key see below in 14.3.1) the result is pasted into this line if a match is found.
- 4 The toolbar for the search cache list:
  - (Ctrl key + F key) Click this button and you can enter the search term on the left, next to the icon. The term in the search cache will then be checked in both the names and phone numbers. All entries found are displayed in the bottom table. The search term must have at least four characters.
  - (F6 key) By clicking this button you will display all of the phone numbers of the current Act! contact from the running Act! application. These numbers are displayed in the bottom table as per the above screenshot. Note that it even displays phone numbers from the secondary contacts.

The following three icons belong to the currently selected item in the search cache list.

- (F1 key) Show the contact in Act!. Brings the Act! application window to top of the desktop.
- (F7 key) Create a history entry in Act!. The data from the current call history item is used and the contact of the selected item in the search cache list.
- (F4 key) Dial number of the selected item.
- **TipTap** displays the Act! contacts with similar phone numbers. Here the incoming call number is checked for the prefix and the first three digits of the suffix. When looking through the search cache, any entries found are displayed here (see 4) and with the "current Act! contact" their phone numbers are shown here too (see 1). It is normal for any leading zeros to be omitted from this display.
- 6 This area of the status bar displays the complete phone number that would be used for dialing. Clicking on the icon on the dialpad will dial up this number.
- 7 The following three numbers in the status bar represent the following values: 1<sup>st</sup> number: number of events in the cache of the TAPI call monitor. As long as all TAPI events are processed, this number is zero.

 $2^{nd}$  number: number of entries in the search cache: the size depends on the number of phone numbers in the stored Act! databases (see 14.2.5).

3<sup>rd</sup> number: number of entries in the top table of the **Call history** 



### 14.3.1 Options for entries in the call history (context menu)

As soon as you mark a call entry in the caller list and click the right-hand mouse button, a number of other options are made available.

り 🌣 Ġ 🇱 🔠 Call history	·9 🧟   1 2   i	]										
Number	Date	Duration	Status	Count	ny	Region	Name		Add. Info	Note		
<	07.03.2016 12:05:42 03.03.2016 13:59:24 03.03.2016 10:58:31 1 03.03.2016 10:38:02 03.03.2016 10:25:47 4 03.03.2016 10:16:36 Schellmann GbR (act!), B	00:01:16 00:00:20 00:00:04 00:00:00 00:00:08 00:00:04	Call received Call received Call received Call received Call attempted Call received	<b>©</b>	Edit no Copy r Call er Looku Create	record htry p number history	P1 F1 F2 F1 F2 F4 F3 F7 F7 Del F	sifrau er mann	Melville-Schellmann GbR Weststrandhalle List Weststrandhalle List Stadt Zürich Erzherzog-Johann-Hütte Stiftung Hömlihütte Zermatt		g am Wes tion und I g-Johann	ststran Informa -Hütte
Number Name	Add. Info	Field	Source									

#### Show record inAct! (F1 key)

Calls up the relevant Act! record in the current Act! application.

#### Edit call note (F2 key)

Puts the cursor in the middle entry line between the two tables so that you can type notes. These can later be copied over when you create an Act! history entry.

#### Call entry (F4 key)

Dials the call number of the selected entry.

#### Lookup number (F3 key)

Searches the Internet to find an address that matches the number of the current entry. The result is displayed in the memo line. Search is also performed for similar numbers.

#### Create history (F7 key)

Opens the dialogue to create a history entry for the selected contact

#### Delete entry (Delete key)

Deletes the currently highlighted call entry.

#### **Delete entries**

Here you can delete all entries or a number of entries from a certain date.



### Copy record (sub menu)

Copy all	Ctrl+C
Copy number	Ctrl+N
Copy region	Ctrl+R
Copy country	Ctrl+L
Number: 041028036	50
Date: 3/30/2017 4:1	9:52 PM
Duration: 00:11:34	
Status: Call complete	ed
Country: Germany	
Region: Ahrensburg	
Name: Melville-Schell	mann
Note: Your Act!-Part	ner.
History status: False	

### Copy number, region and country (CTRL+C, N, R, L)

Copies all data, the transferred call number, region or country of the current entry into the clipboard.

The lower part of the windows shows the information from the columns number, reggion and country plus the information eventually gathered by the "reverse search" function (preceded by the keyword "Note:"). Clicking an item copies it to the clipboard (w/o the keyword).



# 15 Act! Patches

ACTOptimum+ also gives you access to various updates that remove a small number of bugs within the Act! program. These patches can be accessed by going through the help menu: Help  $\rightarrow$  Info about ACTOptimum+...

ACTOptimum+	Version 6.0.6499.180	21
Copyright © 2006-2017 M Registration	lelville-Schellmann. All rights reserved.	
Registered product	ACTOptimum+ 20	
License type	Workstation license	
System number	7048032184	
License number	2011 0207 00	
Registration code	00004	
License valid until	No. Lot El 2010	
Program details	Updates Registration	
Program details		,
Туре	Value	,
Type .NET-Assembly	Value Melville_Schellmann.ACTOptimum6.Plugin, Version=6.0.649	,
Type .NET-Assembly Program path	Value	/
Type .NET-Assembly	Value Melville_Schellmann.ACTOptimum6.Plugin, Version=6.0.649 C:\Program Files (x86)\ACT\Act for Windows\Plugins\Melvi	,
Type .NET-Assembly Program path Program GUID	Value         Melville_Schellmann.ACTOptimum6.Plugin, Version=6.0.649         C:\Program Files (x86)\ACT\Act for Windows\Plugins\Melvi         fa1e637e-1488-4084-b1d5-dacf0e93e200	-
Type .NET-Assembly Program path Program GUID Act! application version	Value         Melville_Schellmann.ACTOptimum6.Plugin, Version=6.0.649         C:\Program Files (x86)\ACT\Act for Windows\Plugins\Melvi         fa1e637e-1488-4084-b1d5-dacf0e93e200         20.0.159.0	,
Type .NET-Assembly Program path Program GUID Act! application version Act! application language	Value         Melville_Schellmann.ACTOptimum6.Plugin, Version=6.0.649         C:\Program Files (x86)\ACT\Act for Windows\Plugins\Melvi         fa1e637e-1488-4084-b1d5-dacf0e93e200         20.0.159.0         de-DE	, ,

Please note: The info screen also provides the ability to check for updates to ACTOptimum+ by clicking the **Updates** button.

To access the updates, click on the **Patches** icon.

The available patches are divided into four categories which we will discuss below.



# 15.1 Language options

The Act! language patch gives you the ability to choose a specific regional language for the Act! application and all Act! resources. So for example, if you are using an English database, you have the option to swap between using the **en-GB** format, or the **en-US** format depending on your own preferences.

PLEASE NOTE: This patch has not been designed to swap languages entirely (ie. Changing an English database into German) but is instead it gives you a preference as to the format used to display your data (eg. The way dates are displayed, or the separator used in number fields).

This function can be enabled/disabled by checking/unchecking the relevant box.

•		Patches		×
ACTOptimu different type	m+ provides several fixes es of corrections can eacl	for the Act! Applic h be enabled or dis	ation and for the Act abled.	! Database. The
Language options	Control Patches Auto-Cl	icks DBPatches	AutoData Patches	
Activate Langu	age correction			
Application langua	age English (United Kingd	lom) (en-GB) 🗨		
Resource language	e English (United Kingd	lom) (en-GB) 💌		
	-			
			ОК	Cancel



# **15.2 Control patches**

Various patches are provided for the Act! user interface. They provide the following enhancements:

- They prevent GDI+ error messages being displayed
- They provide amendments to the form [Firma Verschieben]
- They replace the toolbar logo with a separate picture file allowing you to embed your own image. In the Act! installation subfolder **Plugins** a grqaphics file called **Toolbarimage.png** is stored. When you start Act! the existing graphic is replaced by this new one, and you can edit this file or replace it with one of your own accordingly.

anguage options	Control Patches	Auto-Clicks	DBPatche	s AutoData Patches	
<ul> <li>Enable automa</li> </ul>	atic UI corrections				
Name				Versions	Language
ACTApp: remove	background image	•		12;13;14;15;16;17;18;19;20	) De;En
LogoPicturebox:	BackgroundImage			12;13;14;15;16;17;18;19;20	) De;En
Firmaverschieber	Formular			12;13;14;15;16;17;18;19;20	) De;En
Firmaverschieben	Formular			12;13;14;15;16;17;18;19;20	) De;En
Firmaverschieben	Formular			12;13;14;15;16;17;18;19;20	) De;En
Firmaverschieben	Formular			12;13;14;15;16;17;18;19;20	) De;En
Firmaverschieben	Formular			12;13;14;15;16;17;18;19;20	) De;En
Toolbar, ImagePo	sition = Top			12;13;14;15;16;17;18;19;20	) De;En
Logo in Toolbar,	lmage = Toolbarlma	ageAct!20.png (	139x37)	20	De;En
Logo in Toolbar S	SizeMode=Auto	16:17:18:19:20	De;En		





# 15.3 Auto-Clicks

These perform automatic mouse clicks that produce the following results:

- Avoidance of the GDI+ error
- o Corrections to the Move Company window
- o Implementation of ACTPlus functions

	Control Patches	Auto-Clicks	DBPatches	AutoData Pato	hes	
Activate auto-clic	cks	Versions		Languages	Event cou	unt
ACTPlusPatch for 'E	dit history' form	12:13:14:15:	16:17:18:19:20	0 En	0 Duration	n 312198 tie
ACTPlusPatch for 'E	-		16;17;18;19;20		0 Duration	n 312322 tio
Patch for 'Move com	npany' form	12;13;14;15;	16;17;18;19;20	0 En	0 Duration	156426 tio
Patch for 'Move divis	sion' form	12;13;14;15;	16;17;18;19;20	0 En	0 Duration	n 156103 tie



# 15.4 DBPatches

Database patches perform corrections directly in the Act! database that help to avoid incorrect values in the settings for the Act! Outlook Synchronisation and ensure that the access rights are set correctly for new companies and contacts.

anguage options	control ratches Auto-clicks	)BPatches	AutoData Patches
<ul> <li>Activate Datab</li> </ul>	base correction	DB ver	•
Name	· D · I		
	ei Beziehungen von Kontakten-Pat		
	le-Schellmann-Sync-Patch		0405;13.1.97.1;13.1.97.0;13.1.112.
	UtlookSync_SyncSets-Patch 1		7.1;13.1.97.0;13.1.112.6
	outlookSync_SyncSets-Patch 2		7.1;13.1.97.0;13.1.112.6
	CompanylsPublic-Patch 2		0405;13.1.97.1;13.1.112.6
	ContactIsPublic-Patch 1		0405;13.1.97.1;13.1.112.6
	ContactIsPublic-Patch 2		0405;13.1.97.1;13.1.112.6



# 15.5 AutoData Patches

This type of patch enables AutoData scripts (VB.NET) to be performed on certain events in the Act! software.

For example, the AutoData Patch "LostFocusFix" helps to fix a loss of focus of the main Act! window in Act! 15.1. Clicking the right hand mouse button also lets you create your own AutoData Patches.

			Patch	nes		
ACTOpt different	imum+ pro types of c	vides severa orrections ca	al fixes for the an each be ena	Act! Applic bled or dis	ation and for the Act! Database sabled.	e. The
.anguage optio	ns Contro	ol Patches	Auto-Clicks D	BPatches	AutoData Patches	
🖌 Activate Au	itoData pat	tches				
Name	Versions	Languages	Event count	Custom	Location	
LostFocusFix	15.1	de;en	0	False	FileAllUsers	
					OK Ca	incel



# 16 Importing CustomInfo predefined standard views into ACTOptimum+

For the ease of use of the query visualizer "CustomInfo" a simple way to activate the standard views was implemented. The contents of these standard views are explained in the next chapter.

The query generator CustomInfo itself is explained in detail in a separate manual.

The folder C:\Program files\Melville-Schellmann\CustomInfo4\Databases contains an XML file (ACTOptimum+ preferences for CustomInfo views.xml) which will activate the standard views by just importing the file into the ACTOptimum+ configuration.

# 16.1 Import procedure

Go to "Tools"->"ACTOptimum+ preferences" and open the ACTOptimum+ configuration screen

Name	CommandBar	Menu	Index	Function	Description		
QuickSearch							
🗹 🔎 QuickSearch - Cont	Connected Menus	Lookup (contact	2	QuickSearch	contact , company ans so on		4
☑ ₽QuickSearch - Com AdvancedReplace	Connected Menus	Lookup (company	-1	QuickSearch	Scans multiple preset fields simultaneously by word fra		Q
🗹 🛷 AdvancedReplace	Connected Menus	Edit	-1	AdvancedRe	Scans and replace in a field also parts of a field content		
AutoNum							
🗹 🤔 AutoNum AutoData	Connected Menus	Edit	-1	AutoNum	Consecutive numbering of records		
🗹 😽 Call Contact with Ti 🗹 😽 Multi-History-Maker	Contact Detail To Contact List Tool		-1 -1	AutoData AutoData	Starts TipTap on top and displays the numbers of the c Creates Histories for a lookup		
RadiusSearch							
🗹 🜒 RadiusSearch 🗹 쪩 RadiusSearch - Com	Connected Menus Company Detail T	Lookup (contact	-1 -1	RadiusSearch RadiusSearch	Searches for records within a zip code and country Searches for records within a zip code and country		
ActPlus							
🗹 🕂 ActPlus				ActPlus			
ActRemote							
🗹 差 ActRemote				ActRemote			
D QuickSearch	▼ Add						

Use the "import" button and browse to the location of the configuration file

C:\Program files\Melville-Schellmann\CustomInfo4

C:\Program files(x86)\Melville-Schellmann\CustomInfo4 (on a 64-bit system)

or



# ACTOptimum+

🛟 Select a settings file	😌 Select a settings file 🛛 🛛 🔀									
Computer 👻 Computer 🗸 Local Disk (C:)	Program Files      ✓ Melville-Schellmann      ✓ CustomInfo4	▼ Databases	- 🐼	Search Databases		2				
Organize 🔻 New folder					-	0				
Favorites      Desktop      Downloads      Recent Places      Ibraries      Documents      Music      Pictures      Videos      Computer      Computer      Computer      Decal Disk (C:)      Projekte (\\MSSERVER2) (P:)      Transfer (\MSSERVER) (T:)      Daten (\\MSSERVER) (X:)      Tools (\\MSSERVER) (2:)	Name ^	Date modified 3/23/2015 2:46 PM	Type XML Document	Size 9 KB						
📬 Network 💌										
File name:				(ML file (*.xml) Open 🔻	Cancel					

Open the file and "Select all":

	Description	Created	
BrowserTab (Contact vi	ew)		
🗖 🚞 Cl - Contact Global	Global Contact views	3/23/2015 2:46:06 PM	
🗖 🚟 Cl - Contact Orga	Organisational Contact views	3/23/2015 2:46:06 PM	
🗖 🚞 Cl - Contact Specific	Specific Contact views	3/23/2015 2:46:06 PM	
BrowserTab (Company v	view)		
🗖 🔤 Cl - Company Global	Global Company views	3/23/2015 2:46:06 PM	
🗖 🚟 Cl - Company Orga	Organisational Company views	3/23/2015 2:46:06 PM	
🗖 🔚 Cl - Company Specific	Specific Company views	3/23/2015 2:46:06 PM	



### Choose "Add":

Vame	Description	Created	
BrowserTab (Contact vi	ew)		
🛛 🚞 Cl - Contact Global	Global Contact views	3/23/2015 2:46:06 PM	
🗹 🔤 Cl - Contact Orga	Organisational Contact views	3/23/2015 2:46:06 PM	
🗹 🔤 Cl - Contact Specific	Specific Contact views	3/23/2015 2:46:06 PM	
D T L (C			
BrowserTab (Company v	newj		
🗹 🖮 Cl - Company Global	Global Company views	3/23/2015 2:46:06 PM	
🗹 🖮 Cl - Company Orga	Organisational Company views	3/23/2015 2:46:06 PM	
🗹 🖮 Cl - Company Specific	Specific Company views	3/23/2015 2:46:06 PM	

and you will see this result:

Name	CommandBar	Menu	Index	Function	Description	
QuickSearch	Commanabai	THOIN .	11004	- a zalon	e overpault	
🗹 🔎 QuickSearch - Contacts	Connected Menus	Lookup (contact view)	2	QuickSearch	contact , company ans so on	
QuickSearch - Companies		Lookup (company view)		QuickSearch	Scans multiple preset fields simultar	eously by word fragments
AdvancedReplace						-
🗹 🖑 AdvancedReplace	Connected Menus	Edit	-1	AdvancedReplace	Scans and replace in a field also pa	rts of a field content
AutoNum						
🗹 📅 AutoNum	Connected Menus	Edit	-1	AutoNum	Consecutive numbering of records	
AutoData						
🗹 🐯 Call Contact with TipTap	Contact Detail Toolbar		-1	AutoData	Starts TipTap on top and displays th	e numbers of the current contact
🗹 🐺 Multi-History-Maker	Contact List Toolbar		-1	AutoData	Creates Histories for a lookup	
RadiusSearch						
🗹 谢 RadiusSearch	Connected Menus	Lookup (contact view)	-1	RadiusSearch	Searches for records within a zip co	de and country
🗹 檫 RadiusSearch - Companies	Company Detail Toolbar		-1	RadiusSearch	Searches for records within a zip co	de and country
BrowserTab (Contact view)						1
🗹 🚞 Cl - Contact Global	BrowserT ab	Contact view		BrowserT ab	Global Contact views	
🗹 🚟 Cl - Contact Orga	BrowserTab	Contact view		BrowserTab	Organisational Contact views	
🗹 <del>阿</del> Cl - Contact Specific	BrowserT ab	Contact view		BrowserTab	Specific Contact views	
BrowserTab (Company view)						
🗹 🚞 Cl - Company Global	BrowserTab	Company view		BrowserT ab	Global Company views	
🗹 🚟 Cl - Company Orga 🗹 🚟 Cl - Company Specific	BrowserT ab BrowserT ab	Company view Company view		BrowserTab BrowserTab	Organisational Company views Specific Company views	
ActPlus	biomacinab	company ric <del>u</del>		biomacinab	Specific company ficms	J
				ActPlus		
				ACCIUS		
ActRemote						
🗹 差 ActRemote				ActRemote		
QuickSearch	Add E	dit Delete			Import	Export Details

Close the configuration screen.

The standard CustomInfo Tabs and views are now available in the Contact and Company detail views.



# 16.2 Contact views

Act! Premium	- ACT2015Demo					
File Edit View	Lookup Contacts	Schedule Write Repor	ts Tools Emarketing H	telp		
act	Back	Forward New	· • •	eeting To-Do Note History E-mail	• • •	
Conta «	👤 Detail View 👤	List View 🔀 🖌 976 c	of 5872 🕨 🗰 💾 🖶	💶 🐼 🏖 🧷 💡 🛛 ACTDemo 💌	A	
Related Tasks View All Contacts Write Letter Print Current Scre Print Mailing Labe		H TechOn an Act! Certified Consu		Phone         2125552485            Direct Phone             Mobile         212-555-4784		
Modify Layout Schedule Activity	Salutation	n Chris		Fax 212-555-2486		
Add Contact to Gi Relate to Another View Groups/Corr	Compan	y CH TechONE		E-mail Chris@CHTechONE.email		
Manage Smart Ta		t 🗖		Web Site www.CHTechONE.com		
	Title	e CEO	•	Address 13 East 54th St.		
	Departmen	t Administration	READ THIS !	Suite 300		
		s Employee	•	City New York		
	Referred B			Country United States		
	History Activities	Opportunities   Ground/Com	appier   Secondary Contacts	Relationships Notes Documents Contact Access User Fields Pr	erconal Info Timalina CT - Contact Global (CL - Contact Orga (CL	Contact Specific
	Dates: All Dates	Types:		Keyword: Go 🕹 Select Users 🥝		Options +
<li>I &gt;</li>	Date	Time Result	Regarding	Regarding & Details	🧷 🤷 Record Manager	Share With

# 16.3 Company views







# **17 Short explanation of CustomInfo standard views**

CustomInfo comes with ready-made data queries for an Act! database which refer to the data captured in your own Act! application, and provide you with important, readily accessible views of your own CRM performance. Condensed information for logging and forecasting is thus at your disposal straight away, making your work with Act! far more structured, efficient and meaningful.

Each Tab contains Buttons executing the actual query.

#### Example TAB (Company global):

Comp «	👖 Detail View 🛛 🟚 List View 📄 🖶 🧏 上	ACTDemo 💌 👳			
Related Tasks	All Companies - 129 company(s), 9 division(s)	·			×
Create New Conta	Ace Pet Store Franchises	A CH TechOne	01 111 0 T		
Lookup Company	<ul> <li>Advantage Services (Europe) Ltd.</li> </ul>	an Act! Certified Consultant	Show/Hide Company Tree		
View Fields Linked	-Alfreds Futterkiste				
Update Fields Link	— Ana Trujilo Emparedados y helados	Company Advantage Services (Europe) I	td. Customer Number		
Write E-mail Using	— Antonio Moreno Taquería	Company Advantage Services (Europe) I			<u>^</u>
Schedule Activity	-Around the Horn	Phone 0 121 651 1941	Address 1st Floor, Quality Ho	use	
Modify Layout	-AVB Enterprises				
View Groups/Com	- BARCA	Fax	=> Geo-Position 41 High Street		
	— Berglunds snabbköp				
	- Best Lender Financing	Toll-Free			_
	- Black Forest Baking				<u> </u>
	Blauer See Delikatessen	ontacts History Activities Opportunities Company Ir	fo CI - Company Global CI - Company Orga CI - Compa	ny Specific	
	- Blondel père et fils	😫 🗶 😋 😂 💩 🗖			
	— Bólido Comidas preparadas				
	-Bon app'		npany History overview Company new		
	- Boomer's Artworx		rtunities employees creation	Info	
	- Bottom-Dollar Markets	closed new c	pen		
	Brandee's Bakery	ompany history overview employees			
	- Brushy's Golfing World	hows the input of histories per user within (today, last 7 days)			
	- B's Beverages	Company histories per user (today)			
	- Cactus Comidas para llevar	There's no data			
	- Cafe 1901				
	- Centro comercial Moctezuma	Company histories per user (last 7 days)			
	- CH Holding	Manager	Number of companies	Number of histories	Last history
• •	- Chop-suey Chinese	Chris Huffman	3	10	3/20/2015 4:52:00 PM
	- Circle Photography	Type of activity	Number of histories	Last date	Number of companies
L Contacts	- Comércio Mineiro	Appointment	4	3/20/2015 4:52:00 PM	2
😃 Groups	- Consolidated Holdings	Company ID	/Status Department show all	Last date	Number of histories
	- Die Wandernde Kuh	Ace Pet Store Franchises	ustomer show company	3/20/2015 7:00:00 AM	6
🔲 Companies	- DMC Software	Date Conta	ct show all Type	Result	Regarding
🗂 Calendar	- Drachenblut Delikatessen	3/20/2015 7:00:00 AM Sandy	Ryan show contact Appointme	nt Appointment Completed	Call
Culcricia	- Du monde entier	3/19/2015 4:31:00 PM Sand	Ryan show contact Marketing	Call Marketing Call Completed	Follow up per email
🗹 Task List	- Dunder Miffine Inc				
Q	- Eastern Connection		Jorgensen show contact Meeting	Meeting Held	Cold Call
C History L	- England comp.	■ 3/19/2015 4:30:00 PM Gavin	Dillerstone 1 show contact Appointme	nt Appointment Completed	Shopping
😪 Opportu	- Ernst Handel	3/18/2015 5:18:00 PM	Sonstige	Field Changed	Field changed
-	— Familia Arquibaldo		Sonstige	Field Changed	Field changed
😳 Emarketi	- FISSA Fabrica Inter. Salchichas S.A.	Preact Ltd.	onsultants 1 show company	3/20/2015 4:52:00 PM	3
Harketpl	- Folies gourmandes		silow company		
H I III Ke (pini	- Folk och fä HB	Marketing Call	1	3/19/2015 4:31:00 PM	1
Reports	- France restauration	Meeting	1	3/19/2015 4:31:00 PM	1
Dashhaard	- Franchi S.p.A.	Sonstige	4	3/20/2015 4:22:00 PM	3
🚯 Dashboard	- Frankenversand				
Q Search	- Freemont Corp				
	- Furia Bacalhau e Frutos do Mar				
삼 Welcome	- Galería del gastrónomo				
30	— Godos Cocina Típica	Print Show			
•	Gourmet Lanchonetes				
	Readv.				Chris Huffman

The contact views are similar to the company views. Depending on how Act! is being used, some views might not be necessary in a specifically company-oriented database.

"Global" and "Organsiational" views are not related to the actual Contact/Company visible in the detail view. They deliver results based on the database as a whole whereas the "Specific" views are referring to the actual Contact/Company in the detail view. Changing the Contact/Company in the detail view will update a "Specific" view automatically.

**1** In case the view shows something that might be of immediate interest concerning the context, the views contain "show" buttons , allowing to "jump" directly to the origin of data in the database (Company, Opportunity, Contact).



# 17.1 Contact views Global

- This view contains 5 queries.
- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Contacts of last 30 days

## 17.2 Contact views Organisational

This view contains 4 queries.

The queries show "bad data" in the Opportunity/Contact area.

- Contacts without Company link
- Contact histories without Company link
- overdue Opportunities
- Opportunities with zero values for amounts/probabilities

## 17.3 Contact views Specific

This view contains 1 query.

- Company relations

This view cures the general lack of Act! having no Company relation table, only a Contact relation table. Based upon Contact relations, this query show relations between Companies based on the Contact relation.

## 17.4 Company views Global

This view contains 5 queries.

- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Companies of last 30 days

## 17.5 Company views Organisational

This view contains 4 queries.

The queries show "bad data" in the Opportunity/Company area.

- Companies without Contact link

- Opportnities without Company link
- overdue Opportunities
- Opportunities with zero values for amounts/probabilities

## 17.6 Company views Specific

This view contains 1 query.

- Company relations

This view cures the general lack of Act! having no Company relation table, only a Contact relation table. Based upon Contact relations, this query show relations between Companies based on the Contact relation.