Act! Premium (access via web) Quick Start for New Users

Act! helps organize all your prospect and customer details in one place so you can prioritize your day and market your products and services more effectively.

This *Quick Start for New Users* Guide explains some of the basics of getting started with Act!. If you are viewing the Quick Start guide online, click the link to go to the page.

Get to Know the Workspace

Most of the tasks that you want to do in Act! require you to:

- Open a *View*.
- Click commands on the *Menu bar*.
- Click buttons (tools) on the *Global toolbar*.
- Click items on the *Navigation bar* (Navbar).
- Click tools on a *view toolbar*.

The following section describes these items.

View. Appears in the main panel of the application. The views are: Act! Insight, Act! Connect, Contacts, Groups, Companies, Calendar, Task List, History List, Opportunities, Emarketing, Reports, Dashboard, Search, and Welcome Page. The Contacts, Groups, Companies, and Opportunities views have a Detail view and List view that you can toggle between.

Menu bar. Located at the top of all views. It contains the default menus and commands for the current view. This means, if you change to a different view, some of the menu commands change to match the view.

Global toolbar. Located at the top of all views. It has buttons (tools) for the most frequently used tasks in every view. An arrow on a button indicates a list of options to select from.

Navigation bar (Navbar). Appears on the left of any view. It contains the primary navigation items for opening views and a Lookup feature for finding information.

View toolbar. Located at the top of every view. It displays tools for tasks related to the view.

TIP: For more information about the workspace, see Help. To open Help, on the menu bar, click **Help Topics**.

All About Databases

When you log on to Act!, you open a database that your Administrator provided you access to. This database may already have contact information that you can begin using. Or, it may be an empty database that needs your contacts' information added to it. When you open the database, you should see your name as the first contact record. This is called your "My Record". Information from your My Record is used when you send e-mails, write letters, run reports, and more.

Log on

1. In the **Address bar** of the browser window, type or select the URL provided by the Administrator.

   The Log on dialog box appears.

2. In the **Log on to** field, select the database.

3. In the **Username** field, type your user name.

4. In the **Password** field, type your password.

5. (Optional) To have the software remember your user name for the selected database, select **Remember my username**.

6. Click **Log On**.

   After three failed attempts to log on, you are locked out for five minutes.

To see an example of a customized database, you can open the demonstration database that is installed with the software. You can view the sample contacts, groups, activities, and other data included in the database. See "Opening the Demo Database" in Help.

Import Contacts

Once you have opened a database, the next step is to add your information. You may have been using other applications to track information. For example, you may use Microsoft® Excel® or Outlook® to track your contacts, clients, or customers. You might purchase prospect lists online. You can bring this information into Act! without manually entering it. You can import your contact information using the Import Wizard, or set up contact integration/synchronization with Outlook or Google.

The following section describes how to import contacts from a comma-separated text file (.csv) using the Import Wizard.

Import contacts from a comma-separated text file

1. Open Act! Premium (access via web).
2. On the **Tools** menu, click **Import Contacts**.
3. On the **Welcome** page, click **Next**.
4. On the **Specify source** page:
   a. In the **File name and location** field, enter the information for your source file, or click **Browse** to locate the file. If necessary, click **Open**.
   b. Click **Next**.
5. On the **Import Type** page, keep the default option of **Typical** selected, and click **Next**.
   For Custom import details, see Help.
6. On the **Confirm Import** page, if the information is correct, click **Next**. If the information is not correct, click **Back** until you reach the page that needs correction.
7. On the **Import Complete** page, a message appears. To view the details of imported data and any errors, click **View import log**. To close the import wizard, click **Finish**.
8. To see the imported data, on the Navbar click **Contacts**. Then, on the view toolbar, click **List view**. The Contact List view opens to display the imported data.

See Help for information on contact integration/synchronization and importing.

Add Contacts to the Database

In addition to importing contacts, you can manually add contacts to the database.

Add a contact

1. On the global toolbar, click the arrow next to **New**, and then click **Contact**.

   A blank contact record appears. This is known as the *Contact Detail view*. You use the Contact Detail view to enter information about one contact. See "Learning About Contact Views" in Help for more information.

2. Type information in the fields, or if a field has a drop-down arrow, select data from a list. Enter as much or as little information as you need.

   - If an exclamation point appears, you need to change the entry in the field. Pause the pointer over the exclamation point for more information.

   - If you plan to set up integration with other applications, such as Outlook or Google, be sure to enter email addresses for the contact. By default, three email address fields are available.

   - Use the ID/Status field to identify contacts by categories. For example, you might have categories such as Personal, Vendor, or Competitor. **TIP:** This is helpful because you will be able to do a lookup and create a list of contacts by category (using the ID/Status field).

3. To correctly identify the first, middle, and last names, click the browse button (...) in the **Contact** field.*

   This ensures that the contact's first and last names and title are used correctly in correspondence. To identify how the salutation should appear in correspondence, you can set a preference. For more information, see "Customizing Name Prefixes and Suffixes" in Help.

4. Add more information about the contact using the tabs located at the bottom of the Contact Detail view. Click a tab to see the types of details you can enter. This guide explains the Notes, History, and Documents tab in "Keep More Details About Your Contacts" on page 9.

5. Click **Save**.

   *(If the contact's name is simply First Last, you can skip this step.)

See the "Integrating Act! with Microsoft Outlook and Google" Help topic for information on contact integration/synchronization.

Set Preferences for Email

You can set preferences to make Act! work the way you want. Some of the preferences you can set include:

- Setting up an email system to use with Act!.
- Selecting either the Act! Word Processor or Microsoft® Word to use when writing letters.
- Customizing list views and tabs by adding grid lines, rows, and row count.
- Selecting a view that opens when you start Act!.

Some default preferences are already set for you. However, you need to set up email to write and send messages. If you currently use Outlook® as your email program, you can use it with Act!.

For more information about compatible email systems and steps for setting other preferences, see "Setting E-mail Preferences" in Help.

Set up e-mail to use Microsoft Outlook

1. On the **Tools** menu, click **Preferences**.
2. Click the **E-mail** hyperlink.

    The E-mail Preferences dialog box appears.

3. Select **Default e-mail program**.
4. Select the **Microsoft Outlook is my default e-mail program** check box.
5. To configure a mail server, click **Configure Mail Server**. This is required to use e-mail merges or Smart Tasks.
    a. Complete the **My e-mail address** and **Real name** fields.

        The Organization and Reply address fields are optional.

    b. In the **SMTP Server** field, type the name of the SMTP server used for outgoing messages.
    c. Do one of the following:
        - If the SMTP server requires authentication, complete the **Account name** and **Password** fields.
        - If the SMTP server does not require authentication, clear the check box.
    d. (Optional) Click **Test Account Settings** to validate the SMTP server. If the test fails, you will receive an error message.
    e. Click **OK**.
6. Under **E-mail Integration**, click **Download** to install the integration component. Follow the prompts to run the download and install the integration component.
7. In the **E-mail Integration** box, click the **Click here** link to see the Web service address. (You will need this information to set up your database as an address book in Outlook.) You can copy the Web service address. Click **Close**.
8. Click **OK**.

Next step: Open Outlook so that you can:

- Add your database as an address book in Outlook. See "Setting Up Address Books for Outlook Integration" in Help.
- Setup your History Options. See Setting up History Options for Outlook Integration via Web

Track Your Schedule and Manage Appointments

In Act!, to-do items and scheduled appointments, such as telephone calls or meetings, are called *Activities*. Scheduled activities appear on your calendar, in the Task List, on the Activities tab, and in the Dashboard. The global toolbar has buttons for the default activity types of Call, Meeting, and To-Do.

When you complete an activity, you need to clear it from your schedule. You can add a history of the activity to the contact's record. (Histories are explained in "Keep More Details About Your Contacts" on page 9.)

EXAMPLE: You need to schedule a meeting with a prospect and several of the key decision makers at his company to demonstrate your products. When you return from the meeting, you need to clear the activity from your schedule and record an outcome of the discussion.

Schedule an activity

1. On the global toolbar, click the **Call**, **Meeting**, or **To-do** button for the type of activity you want to schedule.
   or
   To schedule another type of activity, click the arrow next to **New**, point to **Other Activity**. Select an activity from the list.
2. Complete the fields in each tab of the Schedule Activity dialog box to select the attendees, provide details, attach a document, and more. (For more information about the fields and tabs, see "Scheduling Activities" in Help.)
3. Click **OK**.
4. If you are notified of a scheduling conflict, resolve it.

 TIP: You can set up calendar integration with Outlook or Google. For more information, see Help.

Clear an activity from the Task List

1. On the Navbar, click **Task List**.
2. Click the check mark column box in the Cleared column for the activity.
   The Clear Activity dialog box appears.
3. Select a **Results** option for the outcome of the activity.
4. To include details with the history of the activity, make sure the **Add Details to History** option is selected. In the text box, edit activity details as needed.
5. Click **OK**.

Communicate with Your Contacts

Act! provides many ways for you to communicate with your contacts. Templates are provided for email messages, letters, memos, newsletters, and more. You can write a letter or send an email to one contact, or use mail merge to write a letter or send an email to a group of contacts. (Groups are explained in "Organize Your Contacts Into Groups" on the next page.)

You must have set up email and selected a word processor (in Preferences). For information about mail merge, see Help.

The following explains how to write and send an e-mail message to a contact.

Write and send an e-mail message

1. On the global toolbar, click **E-mail**. (**TIP:** You can also click the contact's e-mail address.)

    The message window appears with the recipient's name in the To field.

2. To send a copy of the e-mail to other recipients, do the following:

    a. Click **To** or **Cc**.

    b. From the dialog box that appears, select names from the list on the left. Click **To** or **Cc** to add the names to the list on the right.

    c. Click **OK**.

3. In the **Subject** field, type a short description of the message.

4. Select options: **Priority**, **Create History**, **Make history private**, or **Return receipt**.

5. In the text box, type your message.

6. To format the text, use the tools on the toolbar.

7. To insert a signature, click the **Insert Signature** tool.

8. Click **Send**.

Write a letter for one contact

1. Display the contact's Detail view or select a contact on the Contact List.

2. On the **Write** menu, click **Letter**.

    The document template opens in your selected word processor. The contact's information, such as name and address, appears in the template.

3. Type the body of the document. (**TIP:** Use the word processor's tools to change the document's text or formatting.)

4. Click **Save**.

5. Use the word processor's menus to print or email the document.

TIP: You can print labels and envelopes for contacts using a report template. For more information, see Help.

Organize Your Contacts into Groups

You can organize contacts into *groups*. Groups let you work with several contacts at once, such as when you send emails or organize meetings.

You can create a group of static contacts which means the contacts remain in the group until you remove them. You can also create a group of dynamic contacts using query criteria. With a query, a contact stays in the group as long as it meets the criteria of the query. A group can include both static and dynamic contacts.

STATIC GROUP EXAMPLE: Create a group of your golf buddies or the parents of your son's carpool.

DYNAMIC GROUP EXAMPLE: Create a group of contacts who are prospects. You name the group: Prospects Sent ABC Product Brochure. You prepare a new product brochure and send it to every contact in that group. Once a contact in the group purchases from you, and you enter the information into Act!, the history is updated and that contact is automatically removed from the group.

Add dynamic contacts to a new group

1. On the global toolbar, click the arrow next to **New**, and then click **Group**.

    A blank Group Detail view appears.

2. In the **Group Name** field, type a name for the group. For example, type Prospects Sent ABC Product Brochure.

3. (Optional) In the **Description** field, type a short explanation to help you identify the group.

4. At the bottom of the view, the **Contacts** tab should be displayed. Click the **Add/Remove Contacts** button.

5. Under **Dynamic members**, click the **Edit Criteria** button.

6. In the **Group Criteria** dialog box, select criteria to build the query:

    a. In the **Type** field, keep the selection of Contact.

    b. In the **Field Name** field, click the down arrow, then select a field from the list. For this example, select ID/Status.

    c. In the **Operator** field, click the down arrow, then select an item from the list. For this example, select Equal To (=).

    d. In the **Value** field, click the down arrow, then select an item from the list or type a value. For this example, select Prospect.

    e. Click the **Add to list** button.

        The query criteria you just selected appears in the center pane.

    f. To see the contacts who currently meet the criteria and will be added to the group, click the **Preview** button.

    g. Click **OK** to add the contacts as members of the group.

        In the Add/Remove Contacts dialog box, the query criteria appears in the Dynamic members section.

7. Click **OK** to save the group and close the dialog box.

    In this example, if a contact purchases from you and becomes a customer, you would change their ID/Status from Prospect to Customer. The contact is automatically removed from the Prospects Sent ABC Product Brochure group.

Keep More Details about Your Contacts

You can easily keep additional details about your contacts using the Notes, History, and Documents tabs. These tabs appear at the bottom of the Contact Detail View (explained in "Add Contacts To The Database" on page 4.) These tabs are another way of organizing information about a contact.

EXAMPLE: After a meeting ends, you add some notes about action items while they are fresh in your mind. Later in the day while out of the office, you receive and respond to a call from another contact. You add a history of the call to the contact's record. You also received a quote from another contact, so you can attach it to the contact's Documents tab.

Add a note

1. On the global toolbar, click **Note**.
2. If you had a contact's Detail view open, that contact's name appears in the **Contact** field. Keep the name, or select one from the list. **Important:** You must select at least one contact.
3. The current date and time appears in the **Date** and **Time** fields. Keep it, or select from the lists to correct.
4. In the large text box below the formatting buttons, type the note.
5. Click **OK**.

Add a history

1. On the global toolbar, click **History**.
2. In the **Type** field, select the type of history, such as Call.
3. (Optional) In the **Result** field, select or type the outcome of the action, such as Call Received.
4. In the **Contact** field, by default, the current contact's name appears. To change it, select a name from the list. **Important:** You must select at least one contact.
5. In the **Date, Time**, and **Duration** fields, keep the default entries or select from the lists.
6. In the **Regarding** field, select an item from the list. For example, select Cold Call. **TIP:** You can type your own text here.
7. In the **Details** text box below the formatting buttons, type the history details. For example, enter the cold call discussion.
8. Click **OK**.

Add a document for a contact

1. On a **Detail View** for a contact, click the **Documents** tab.
2. Click **Add Document**.
3. In the **Upload File** dialog box, browse to the document to add, and then click **Open**.
4. Click **OK**.

Search for Contacts

There are many ways to search for contacts or other information. Several of the methods let you create lists and work with the results of the search. For more information, see "Features of Act! Search" in Help.

EXAMPLE 1: You remember entering that a contact was interested in creating a website for "green" products. You cannot remember the contact's name or where you put the information. Was it in a note? A history? You can search on the term "green".

EXAMPLE 2: You want to find all contacts you do not have email addresses for and create a list so that you can get the information.

Search using a search term

1. In the **Search** text box in the menu bar, type your search term or terms. Press Enter.

   If Search finds items, results appear in columns showing the type (Contact, note, etc.), name, field name and content, and last edited date. If available, use the scroll bar to view all results.

   If Search does not find anything, a message appears. Revise your search term, and search again.

2. (Optional) If Search returned too many results, and you need to narrow or limit the results, use the **Show Only** and **Last Edited** filters located to the right of the results.

   - To limit the results by category, under **Show Only**, select one or more items.
   - To limit the results by date range, under **Last Edited**, select an item. By default, the All Dates filter is selected.

     Selecting or changing filters changes your search results. For example, selecting the "Groups" check box will reset the search results to show only Group records.

3. You can do the following with the search results:

   - To view an item in the search results, such as a contact, click the Name hyperlink. The contact's Detail view appears.
   - To create a lookup of the contact or company records found in your search results, click the Contacts or Companies button under Create Lookup.
   - To change your search term and search again, clear the text in the Search box and type a new term. Click Go.
   - To exit the Search pane, click any button on the Navbar.

Search for contact records missing an email address

1. On the Navbar, click **Contacts**.
2. On the **Lookup** menu, click **E-mail Address**.
3. In the **Operator** field, select **Does Not contain Data**.

   > ℹ To search for all contact records *with* email addresses, in the second drop-down list, select the operator Does Contain Data.

4. Click **OK**.

   The search results appear in the Contact List view. If only one contact record is found, the Contact Detail view appears. You can print the list or export it to Excel.

Share Information with Others

You have entered information into your database. Now, you want to share some of it with others, maybe someone who does not have access to Act!. You can export information from several views, called *list views*, into Excel®. You can also print many items, such as lists, reports, address books, and calendars.

For more information about all the items you can print, see "Printing" in Help.

Export data to Excel

1. On the Navbar, click **Contacts**. Then, on the view toolbar, click **List View**.

2. (Optional) To make sure data appears in Excel in the order you want, on the view toolbar, click the **Customize Columns** tool. Re-order the columns, and then click **OK**.

3. On the view toolbar, click the **Export to Excel** tool.

4. In the **File Download** dialog box, click **Open** to display the data in an Excel window, or click **Save** to save the data to an Excel file.

   In Excel, the column headings and order are retained from the exported list. You may have to select the worksheet from the taskbar.

Print your calendar

1. On the Navbar, click **Calendar**.

2. Select the calendar view to print (Today, Daily, Work Week, Monthly).

3. On the view toolbar, click the **Print** tool.

4. From the **Paper type** list, select a paper type.

5. To preview how the calendar will look, select the **Preview** check box.

6. To include data from other fields and to set additional options, click the **Options** button. Select or clear items as needed.

7. Click **OK**.

   The calendar opens as a PDF document in your browser. Use the browser's Print tool to print it.

Important Notes:

For Act!: You must purchase one license of Act! per user. Scalability varies based on hardware, size, and usage of your database. Review Act! system requirements at www.act.com/systreq. Visit the Marketplace or contact your add-on product provider to determine compatibility for your add-on products.

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