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FOR
DUMMIES[®]
9TH EDITION

by Karen S. Fredricks



Wiley Publishing, Inc.

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About the Author

Karen S. Fredricks began her life rather non-technically, growing up in Kenya. She attended high school in Beirut, Lebanon, where she developed her sense of humor while dodging bombs. After traveling all over the world, Karen ended up at the University of Florida and has been an ardent Gator fan ever since. In addition to undergraduate studies in English and accounting, Karen has a Master's degree in psycholinguistics. Beginning her career teaching high school English and theatre, Karen switched to working with the PC during its inception in the early '80s and has worked as a full-time computer consultant and trainer ever since.

Karen is an ACT! Certified Consultant, an ACT! Premier Trainer, a Microsoft Office User Specialist, and a QuickBooks Pro Certified Advisor. This is the fifth *For Dummies* book that she has written on ACT!. In addition, she has written or co-written three other *For Dummies* books on Outlook 2007, Outlook 2007 with Business Contact Manager, and Microsoft Office Live. She is a frequent guest on several syndicated computer radio talk shows and has frequent public speaking engagements.

Karen resides in Boca Raton, Florida. Her company, Tech Benders, specializes in contact relationship management (CRM) software and provides computer consulting, support, and training services. Karen particularly enjoys helping her clients increase their bottom line through their marketing efforts and improved sales processes. In her spare time, Karen loves to spend time with family and friends, play tennis, work out, ride bikes, and write schlocky poetry.

Feel free to send your comments about the book to www.dummies@techbenders.com.

Dedication

This book is dedicated to all loyal ACT! users who have been using ACT! for the last 20 years. You've grown right along with ACT!. You've been with ACT! since the days of DOS and then transitioned to the "new" Windows version. You've mastered e-mail marketing and then went on to tackle SQL. You're truly both a fanatic and loyal bunch; thanks for your continuing support!

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It's hard to believe that ACT! celebrated its 20th birthday in 2007. I want to recognize a few people for their contributions to the early development of ACT!, including Patrick Sullivan for his vision in creating the concept, Greg Head for helping to take ACT! to the next level, and Ted Cooper and Jason Risch for being the unsung ACT! pioneers.

There are many wonderful Sage employees who work behind the scenes at Sage and love ACT! as much as I do. Bob Duff, Melissa Lorch, and Latisha Carter spend hours providing services that benefit ACT! consultants like myself. Larry Ritter, Richard McMakin, Beth Kohler, Bill Blakey, Keith Sacucci, and Anthony Federici are part of the "dream team" who keep coming up with great new ACT! enhancements. Joe Bergera is the leader of the pack; he has done wonders at taking over the reigns of the entire ACT! product line.

Roy Laudenslager worked as an ACT! Support Specialist for over 12 years before taking the plunge to come work with me. He also let me coerce him into being the technical editor for four of the ACT! books. Roy was the recent recipient of the ACT! Community Service Award, officially recognizing him for his years of devotion to the ACT! product. If you've ever worked with Roy, you know how deserving he is of that award.

My family is extremely special to me. My daughters, Andrea and Alyssa Fredricks, have brought much joy to my life and are a constant source of pride. Hard to believe that my mother, Frances Conn, is now in her 90s and is still sharp as a tack — even without a computer!

Writing a book isn't easy but having someone special in your life certainly makes it a lot more fun! Gary Kahn has loved and supported me during the writing of my last eight books. You're the best — I couldn't have done it without you!

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We're proud of this book; please send us your comments through our online registration form located at www.dummies.com/register/.

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Introduction

ACT! is the best-selling contact manager software on the market today. For many of these users, ACT! represents their first foray into the area of *contact relationship management* (CRM). Contact management software is a little more complex to understand than other types of software. With a word processor, each document that you create is totally separate; if you make a mistake, you need only to delete your current document and start fresh. Contact management, however, builds its way into a final product; if you don't give a bit of thought as to what goal you wish to achieve, you could end up with a muddled mess.

I am a *fanACTic*, and I'm not ashamed to admit it. I use ACT! at work. I use ACT! on the road. I use ACT! at home. I've even inspired my friends to use ACT!. I'm excited about the product and know that by the time you discover how to unleash the power of ACT!, you'll be excited, too.

So what am I so excited about? I've seen firsthand how ACT! can save you time and help make you more efficient in the bargain. To me, accomplishing more in less time is an exciting thought — it allows more time for the fun things in life. Best of all, ACT! is a program that's very easy to get up and running in a very short time. You'll be amazed not only at how quickly you can set up a database but also at how easily you can put that database to work. Maybe by the time you finish this book, you, too, will become a fanACTic!

About This Book

ACT! by Sage For Dummies, 9th Edition is a reference book. As such, each chapter can be read independently and in the order you want. Each chapter focuses on a specific topic so you can dive right in, heading straight for the chapter that interests you most. Having said that, however, I must say that I've tried to put the chapters into a logical sequence so that those of you who are new to ACT! can just follow the bouncing ball from chapter to chapter. More experienced users can use the Table of Contents and the index to simply navigate from topic to topic as needed.

Essentially, this book is a nuts-and-bolts how-to guide for accomplishing various tasks. In addition, drawing on many of my own experiences as a full-time ACT! consultant and trainer, I include specific situations that should give you a feel for the full power of ACT!.

Conventions Used in This Book

Like in most Windows-based software programs, you often have several different ways to accomplish a task in ACT!.

For the most part, I show you ways to perform a function by using the ACT! menus. When an instruction reads Choose File⇒Open, you must access the File menu (located at the top of the ACT! screen) by clicking it with the left mouse button and then choosing the Open option from the subsequent menu that appears. In most cases, you can access these commands from anywhere within ACT!, but I generally advise new ACT! users to always start a task from the Contact Detail view, which is the first window you see when ACT! opens. If you must be in a particular area to complete a task otherwise, I tell you where.

When you need to access one of ACT!'s hidden menus, click an appropriate area of the screen with the right mouse button and then choose from the contextual menu that appears. In these instances, I simply say *right-click* when you need to right-click.

What You Should Read

Of course, I hope that you're going to sit down and read this entire book from cover to cover. But then again, this book isn't The Great American Novel. And, come to think of it, the whole reason why you bought this book in the first place is because you want to get your ACT! together (no groans, please!) as quickly as possible because you're probably finding yourself with too much to do and too little time in which to do it.

For the time being, I'm going to let you get away with reading just the parts that interest you most. I'll let you read the last chapter first and the first chapter last if you like because this book is designed to allow you to read each chapter independently. However, when you find yourself floating in a swimming pool, soaking up the sun, and wondering what to do with all your spare time, you might want to go back and read some of those chapters you skipped. You just might discover something!

What You Don't Have to Read

This book is intended for both new and existing ACT! users. Most of the instructions apply to both groups of readers. Once in a while, I include some information that might be of special interest to more advanced readers.

Newbies, feel free to skip these sections! Also, any information tagged with a Technical Stuff icon is there for the truly technically inclined. Everyone else can just skip this info.

Foolish Assumptions

One of my least favorite words in the English language is the word *assume*, but I've got to admit that I've made a few foolish — albeit necessary — assumptions when writing this book. First of all, I assume that you own a Windows-based computer and that ACT! is installed on it. Second, I assume that you have a basic knowledge of how to use your computer, keyboard, and mouse, and that ACT! isn't the very first application that you're trying to master.

I also assume that you have a genuine desire to organize your life and/or business and have determined that ACT! is the way to go. Finally (and I feel quite comfortable with this assumption), I assume that you'll grow to love ACT! as much as I do.

How This Book Is Organized

I organized this book into six parts. Each part contains several chapters covering related topics. The following is a brief description of each part, with chapter references directing you where to go for particular information:

Part I: The Opening ACT!

In Part I, you get an introduction to the concept of a database and why ACT! has become such a popular choice of database users (Chapter 1). In this part, you read about what to expect the first time you fire up ACT! (Chapter 2) and how to set the main preferences in ACT! (Chapter 3).

Part II: Putting the ACT! Database to Work

Part II focuses on putting your contacts into ACT! (Chapter 4) and, more importantly, how to find them again (Chapters 6). I show you how to view all the details about one contact, how to pull up a list of all your contacts, and even how to create an easy list report.

After you master organizing your contact information, Part II helps you organize your day. ACT! makes it easy to take notes (Chapter 7) so that you start relying on ACT! more and your memory less. You find out how to schedule appointments, calls, and to-do's — and other important events in your life. And, you discover how to view those activities in the daily, weekly, and monthly calendars (Chapter 8). Your life can become complicated, but have no fear because ACT! does its best to help you navigate through the maze by providing you with customizable Dashboards designed to let you see a complete snapshot of your business (Chapter 9). The History, Documents, and Secondary Contacts tabs allow you to accumulate lots of information about each and every one of your contacts (Chapter 5).

Part III: Sharing Your Information with Others

Corporate America lives for reports, and ACT! is up to the challenge. Whether you want to print labels or telephone directories on commercially printed forms or prefer to utilize the ACT! built-in reports, Part III shows you how (Chapter 10).

One of the best features of ACT! is the ability to communicate easily with the outside world. Part III shows you how to work with templates to automate routine documents as well as how to send out mass mail merges — whether by snail mail, fax, or e-mail (Chapter 11). You also discover the advantages of using ACT! for your e-mail (Chapter 12).

Part IV: Advanced ACT!ing

We're all different and often like to do things in our own unique way. ACT! understands that concept, and Part IV helps you to customize ACT! to your heart's content. At first glance, ACT! might seem like just an over-the-counter piece of software, but by adding fields (Chapter 13) and placing them on customized layouts (Chapter 14), you can make it perform as well as an expensive piece of proprietary software.

Every database needs an Administrator. If you're elected to the job, you need to know how to perform administrative tasks, such as performing routine maintenance, backing up your database, and checking for duplicate data entry (Chapter 15). You'll read about *ACTdiag*, the higher-level maintenance tool, how to add multiple users to your database, and how to limit access to various contact records (Chapter 16). If you have remote users who need to access all or parts of your database, you need to know how to synchronize your database (Chapter 17).

Part V: Commonly Overlooked ACT! Features

Part V focuses on four of the most frequently overlooked ACT! features:

- ✓ **Microsoft integration:** Synchronize your ACT! and Outlook address books and calendars; attach a Web site in Internet Explorer directly to an ACT! contact; and explore the various ways that you can use ACT! and Excel together (Chapter 18).
- ✓ **Sales opportunities:** Track your prospective sales, prioritize them, and analyze what you did right — or wrong — in making the sale (Chapter 19).
- ✓ **Groups:** Group your contacts to add a new dimension to your database (Chapter 20).
- ✓ **Companies:** The Company feature enables you to view and edit contacts that all “belong” to the same company (Chapter 21).

In addition, I show you how to install and customize ACT! Premium for Web, the online version of ACT! (Chapter 22).

Part VI: The Part of Tens

With apologies to David Letterman, Part VI gives you two of my favorite ACT! lists. First, I discuss a few of the features that are found only in ACT! Premium 2008 (Chapter 23). Finally, I give you ten of my favorite ways to help you utilize ACT! to its fullest extent (Chapter 24).

About the Web site

2004 marked a milestone in the history of ACT!. Prior to that time, the ACT! development team was fairly small, which is evidenced by the fact that only six versions of ACT! were released in the first 17 years of its existence. In 2004, Sage Software took over the ownership of ACT!. With the new ownership came a new database engine for ACT! — SQL — and a commitment to a yearly update schedule.

To help you keep up with the exciting new features of successive versions of ACT!, this book (although written using ACT! 2008) will guide you through both ACT! 2008 and ACT! 2009. We are instituting a Wiley Web site (pun

intended!) where you will be able to catch up on any new ACT! developments that come along: You'll find links to the products mentioned throughout this book, and, most importantly, when ACT! 2009 arrives on the scene, you'll be able to read all about the new enhancements — free of charge — by visiting www.dummies.com/go/actfordummies9e.

Icons Used in This Book



A Tip icon indicates a special timesaving tip or a related thought that might help you use ACT! to its full advantage. Try it; you might like it!



A Warning icon alerts you to the danger of proceeding without caution. *Do not* attempt to try doing anything that you're warned not to do!



Remember icons alert you to important pieces of information that you don't want to forget.



A Technical Stuff icon indicates tidbits of advanced knowledge that might be of interest to IT specialists but might just bore the heck out of the average reader. Skip these at will.

Where to Go from Here

For those of you who are ACT! old-timers, you might want to at least skim the entire contents of this book before hunkering down to read the sections that seem the most relevant to you. My experience is that the average ACT! user probably uses only a portion of the program and might not even be aware of some of the really cool features of ACT!. You might be surprised to discover all that ACT! has to offer!

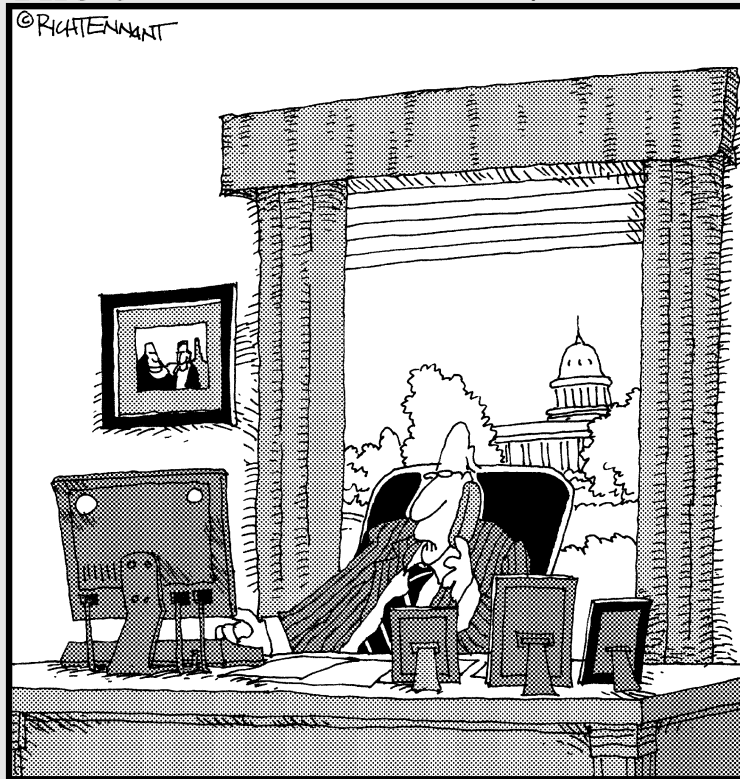
For the ACT! newbie, I recommend heading straight for Part I, where you can acquaint yourself with ACT! before moving on to other parts of the book and the ACT! program.

Part I

The Opening ACT!

The 5th Wave

By Rich Tennant



“Yes, I know how to query information from the program, but what if I just want to leak it instead?”

In this part . . .

I know that you're excited about all the possibilities that ACT! has to offer and want to dive into the program as soon as possible. Here's where you find an overview of some of the cool features that you find in ACT!. You also become familiar with the many faces of ACT!; after all, you wouldn't want to get lost along the way. But first, you have to do a bit of homework and whip ACT! into shape by fiddling with a few preference settings to ensure that ACT! produces the type of results that you're looking for.