

# Chapter 1

## An Overview of ACT!

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### *In This Chapter*

- ▶ What is ACT!?
  - ▶ Who uses ACT!?
  - ▶ Basic ACT! concepts
  - ▶ A few basic ground rules
  - ▶ The “Two ACT! Flavors”
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**S**o what is ACT!, anyway? I find that one of the hardest things that I have to do with ACT! is to explain exactly what it is. I like to initially explain ACT! by using very politically correct terminology. For example, ACT! 2006

- ✓ Is a contact management software package
- ✓ Provides users and organizations with powerful tools to manage their business relationships
- ✓ Can be customized based on your company’s requirements
- ✓ Is the world’s leading contact management software

Feel free to use these points to impress your friends. You might want to mention some of the wonderful features of ACT!, which I do in the first section of this chapter. I also describe the typical ACT! user and give you a brief primer on some pertinent ACT! terminology. I give you a few ground rules that I’ve established over the years after watching new users wrestle with certain aspects of using ACT!. Finally, I talk about the two versions of ACT! that are available to you.

### *What Does ACT! Do?*

Because I want you to enjoy the benefits of using ACT!, I’ve put together a little shopping list of features so that you can see all that ACT! can do for you, too. In parentheses after each item, I include a chapter reference where you can find more information about a particular feature (if you’re so inclined).

ACT! is a multifaceted personal management tool that

- ✓ **Stores complete contact information**, including name, company, phone numbers, mailing addresses, and e-mail addresses. (Chapter 4)
- ✓ **Comes with over 50 predefined fields for each contact** that you add to your database. If you want to add additional fields to meet your specific needs, go right ahead. (Chapter 13)
- ✓ **Records an unlimited number of dated notes for each of your contacts** so that you can easily keep track of important conversations and activities. This feature is particularly useful for those of us who (unlike our friend, the elephant) do forget things on occasion. (Chapter 7)
- ✓ **Keeps more than a boring old calendar.** Your scheduled activities are cross-referenced with the appropriate contact so that you have a full record of all interactions that you've had — or will have — with that contact. In addition, you can set an alarm to remind you of the important stuff as well as roll over less-important things until the next day. (Chapter 8)
- ✓ **Prints out anything** from simple phone lists or address books to detailed reports on activities, notes, leads, and sales opportunities. You can print reports of your reports if you feel so inclined. (Chapters 9 and 10)
- ✓ **Creates mailing labels and envelopes.** Or, if you prefer, perform broadcast faxes and e-mails with ACT!. (Chapters 11 and 12)
- ✓ **Manages your sales pipeline** with built-in forecasting tools. You can easily print a few sales reports or create a graph showing your open, won, or lost sales. (Chapter 19)
- ✓ **Synchronizes data with remote users.** If you have other ACT! users in remote locations, you can send database changes to them and vice versa. (Chapter 17)
- ✓ **Lets you design and activate a series of activities** to automate your tasks, thus assuring that none of your contacts “fall through the cracks.” (Chapter 8)

## *The Typical ACT! User*

So just who is the typical ACT! user? Well, with more than 4 million registered ACT! users and 11,000 businesses currently using ACT!, you're safe to assume that nearly every industry is represented among its user base. Although ACT! started primarily as a tool for salespeople wanting to follow up on their prospects and customers, ACT! has evolved into a tool used by any individual or business trying to organize the chaos of daily life.

I think it's only fair to warn you about one of the possible side effects that you might develop if you use ACT!. If you're anything like me, you'll become addicted to ACT! and eventually use it to manage all facets of your busy existence. You might just become a fanACTic. (Quite simply, a *fanACTic* is an ACT! user who has become addicted to using ACT!.)

So just who is using ACT!? Everyone.

- ✓ A CEO uses ACT! because he wants to know what his salespeople are doing and how his customers are being treated.
- ✓ An administrative assistant uses ACT! it to automate routine tasks and to keep a schedule of various tasks and activities.
- ✓ A salesperson uses ACT! to make sure that she's following up on all her prospects.
- ✓ A disorganized person uses ACT! to help him become more organized.
- ✓ A smart person uses ACT! because she knows that she'll have more time to play by working more efficiently.
- ✓ A lazy person uses ACT! because he knows it's more fun to play than to work.

So what kinds of businesses use ACT!? All kinds.

- ✓ Large businesses that want to improve communication among employees
- ✓ Small businesses that have to rely on a small staff to complete a multitude of tasks
- ✓ Businesses of all sizes looking for software that can automate their businesses and make them more productive in less time
- ✓ Businesses looking to grow by marketing to their prospects
- ✓ Businesses looking to retain their current customers by providing an excellent level of customer service and developing lasting relationships

So who's *not* using ACT!? Okay, I just said that simply *everyone* is using ACT!, but a few stubborn folks remain out there who aren't looking to organize their lives, such as

- ✓ Workaholics who live to spend every waking moment at work
- ✓ Hermits who don't need to schedule any appointments or remember to make follow-up phone calls
- ✓ Individuals with photographic memories who retain all information and never need to take a note
- ✓ Companies that require no paperwork
- ✓ Businesses that do no marketing or that have no interest in expanding their customer base

## A Few Concepts to Get You Started

Nobody likes technical jargon, but in the course of showing you how to use ACT!, I might end up lapsing into Geek Speak and use a handful of somewhat technical terms; I just can't avoid it. Becoming familiar with them now is less painful in the long run.

First things first. ACT! is a database program. A *database* is a collection of information organized in such a way that the user of the database can quickly find desired pieces of information. Think of a database as an electronic filing system. Although most ACT! users create a database of contacts, some users develop ACT! databases to collect information about things other than contacts. For example, you might create an ACT! database to catalog all the CDs and DVDs in your collection.

Traditional databases are organized by *fields*, *records*, and *files*:

- ✓ **Field:** A *field* is a single piece of information. In databases, fields are the smallest units of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. In ACT!, you start with 50 separate fields for each individual contact. You find out how to add information into these fields in Chapter 4. And, in Chapter 13, I show you how to change the attributes of existing fields and how to add new ones to your database if you're the database administrator.
- ✓ **Record:** A *record* is one complete set of fields. In ACT!, all the information that you collect that pertains to one individual contact is a *contact record*.
- ✓ **File:** A *file* is the entire collection of data or information. Each database that you create in ACT! is given a unique filename. You can create more than one file or database in ACT! — head to Chapter 3 to find out how.

## The Basic ACT! Ground Rules

Sometimes you just need to learn things the hard way. After all, experience is the best teacher. Luckily for you, however, I've compiled a list of rules based on a few mistakes that I see other ACT! users commit. You're not going to find these rules written down anywhere else, and they might not even make a whole lot of sense to you at the moment. However, as you become more and more familiar with ACT!, these rules will make all the sense in the world. You might even want to refer to them from time to time.

***Karen's Four Rules of Always:***

- ✓ Always log in to ACT! as yourself.
- ✓ Always strive for standardization in your database by entering your data in a consistent manner.
- ✓ Always input as much information into your database as possible.
- ✓ Always perform routine maintenance of your database at least once a week and create a backup after any session that involved new data input!

## ***The Two ACT! Flavors***

ACT! 2006 comes in two separate editions. Everything I cover in this book applies to both versions of ACT!:

- ✓ ACT! 2006
- ✓ ACT! 2006 Premium for Workgroups

Every feature found in ACT! 2006 is also found in ACT! 2006 for Workgroups as well. However, from time to time, I point out a feature that is found only in the workgroup version.



All users sharing the same database must be using the *same* edition of ACT!; this means that one user can't be in ACT! 2006 while another is in ACT! 2006 for Workgroups. It also means that users of an older version such as ACT! 6 can't share a database with users of an ACT! 2006 database.

You'll want to be aware of the basic differences between the two versions, so here they are:

## ***ACT! 2006***

ACT! 2006 is geared towards the individual or small business user with less than ten users. Most small environments would typically not use the enterprise features found in ACT! 2006 Premium for Workgroups. ACT! 2006:

- ✓ Utilizes the Desktop Edition (MSDE) version of SQL
- ✓ Is designed for individuals and small workgroups
- ✓ Allows a maximum of ten active named users per database
- ✓ Has a size limitation of 2GB per database

- ✓ Considers contacts as *Public* (viewable by all database users) or *Private* (viewable only by the Record Manager who created the record)
- ✓ Has two methods of synchronizing remote data
- ✓ Can't open a database created using ACT! 2006 Premium for Workgroups

## ACT! 2006 Premium for Workgroups

It's important to note that ACT! 2006 Premium for Workgroups contains all of the features found in ACT! 2006. However, the Premium version also includes several extra features that the corporate user just might find appealing.

- ✓ Includes Microsoft (MS) SQL Server Standard Edition but can also work with MSDE if preferred
- ✓ Is designed for the corporate enterprise user
- ✓ Doesn't place a limit on the number of database users
- ✓ Is more *scalable*, meaning that it's unlikely you'll outgrow your database
- ✓ Takes the issue of security one step further by adding a third level of contact access — *limited access*.

Database managers and administrators can allow users or teams of users to access these limited access contacts on a contact-by-contact basis.

- ✓ Has three methods of synchronizing remote data
- ✓ Can open a database created using ACT! 2006 and can save a database to ACT! 2006 format
- ✓ Includes Group Invitations and resource scheduling
- ✓ Provides advanced administrative functionality, including silent installations and automated maintenance procedures (Chapter 16).
- ✓ Provides advanced opportunity tracking

So what are you waiting for? Boot up your computer, grab the book, and get going. After all, it's time to ACT! (pun intended).