

ACT! | Whitepaper

Integration with Microsoft® Office

ACT! by Sage Product Family



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Executive Summary

ACT! helps you organize all the details of your customer relationships in one place for a complete view of the people you do business with. This centralized contact data helps individuals or teams find contact information and coordinate schedules quickly and easily. In addition, users can integrate ACT! with certain Microsoft Office applications, such as Microsoft Word, Microsoft Excel®, Microsoft Outlook® and Internet Explorer®, to further leverage their contact data.

As Office is widely deployed throughout the business world, ACT! integration with Office applications creates a technology environment enabling businesses to achieve greater efficiencies. Busy professionals are constantly juggling multiple tasks, managing large amounts of information, and racing against deadlines. In such an environment, they require tools that allow them to work more efficiently so they can work smarter, not harder.

The purpose of this paper is to detail ACT! 2010 integration with the above core Office applications. It explores how ACT! users can leverage the capabilities of ACT! integration with Office and assumes the reader has a basic understanding of each Office application. The Integration capabilities addressed in this paper pertain to the 2010 versions of ACT! by Sage, ACT! by Sage Premium, and ACT! by Sage Premium for Web. NOTE: ACT! Premium for Web is only available in North America with ACT! by Sage Corporate Edition (includes ACT! Premium and ACT! Premium for Web) and is not available as a standalone product. ACT! Premium for Web may have limited availability as a standalone product in other regions. Please check with your local region for availability.

The ACT! features discussed in this paper are consistent across Office versions, the commands may be on different menus depending on your version of Office. Throughout this document, we will show screenshots in Office 2007.

To illustrate basic and advanced capabilities, this paper will present user scenarios describing how to perform on-the-job tasks more efficiently using ACT! integration with Office applications.

Integration with ACT! and Office Applications Overview

ACT! integrates with several Office applications, including Microsoft Outlook, Microsoft Excel, Microsoft Word, as well as Internet Explorer.

ACT! integration with Outlook enables multiple functions to occur between ACT! and Outlook.

Primarily among them:

- Outlook E-mail messages can be saved automatically as ACT! Histories
- Outlook E-mails can be addressed using ACT! databases as an address book
- Outlook Rules and Alerts can utilize ACT! contact information
- ACT! Contact record can be created from within Outlook¹
- ACT! Activities can be created from within Outlook
- ACT! calendar items can be copied to Outlook and vice-versa²
- ACT! appointments can be sent in iCalendar format so that Outlook users can view it as an Outlook Calendar Appointment.

NOTE: During setup, the default options for e-mail integration will be set to Outlook if Outlook is installed on the machine.

^{1,2} This feature is not available in ACT! Premium for Web.

ACT! integration with Word allows users to create letters, memos, fax cover pages, and custom templates for documents. From within Word, you can attach any document directly to an ACT! contact for reference later. New to ACT! 2010 is Word integration for the Web client which allows you to create a mail merge using Word.

From most list views in ACT!, users can export data directly into Excel although special security permissions may be required. Please refer to Security Whitepaper for more information about security restrictions. Users can also embed ACT! fields in Excel spreadsheets³ and add them to a Contact, Group, or Company Documents tab. From within Excel, you can attach any spreadsheet directly to an ACT! contact for reference later. ACT! integration with Internet Explorer enables ACT! to link to and cache external Web pages. The Web Info tab embeds common pages from Google™, Yahoo!®, LinkedIn®, Facebook and more while dynamically displaying information based on Contact and Company Records.

Increase Business Efficiency through Office Integration

Producing letters and memos, sending e-mails, and searching the Web are all part of everyday life for a business person and are a key aspect of good contact management. The following example shows how the integration of ACT! and Office enables an organization to make the most of exhibiting at a trade show.

Jay is an ACT! user, and his company will be exhibiting at a trade show. Jay uses ACT! mail merge capabilities to create a pre-event mailing for customers and prospects who are in his ACT! database, inviting them to the trade show. After the event, Jay can import leads gathered at the show into ACT! and assign them to members of the sales team. The sales team can then use ACT! to schedule calls or meetings, send follow-up e-mails, and continue to follow up on outstanding events or tasks to manage their ongoing relationship with those contacts and to move prospects to a sale. The marketing team can use the integration of ACT! and Word to perform a mail merge of contact information into a thank you letter template. In this way, they can deliver a personalized communication to each contact and track the correspondence on the contact record, so everyone working with that contact is aware of the most recent activity.

The next step in the process may be for sales to contact the leads. If sales related responsibilities are shared across the organization, integrating ACT! and Outlook calendars lets departments share calendars, providing information about calls and meetings to everyone who needs to know, even individuals who only use Outlook. If sales reps decide to meet with individuals in-person, they can use ACT! integrated with Internet Explorer to get driving directions, based on address data already kept in ACT!. They can also get details such as company-specific news and local weather based on the contact details in ACT!.

Events are just one example of an opportunity to gather customer and prospect data and use ACT! integration with Office to take action on that data. Mass-marketing programs also generate sales leads. For example, an organization might use tools like Excel to standardize data from these various lead-generating efforts. The organization can then bring this information into ACT!, and the sales cycle can efficiently continue.

These scenarios are everyday business occurrences. The capabilities inherent in the integration of ACT! and Office greatly enhance the efficiency and effectiveness of communicating with prospective and existing customers.

³ This feature is not available in ACT! Premium for Web.

The following sections will go into further details on ACT! integration with each of the Office components.

ACT! Integration with Outlook

Outlook is the de facto e-mail and calendar application in many organizations. ACT! has robust integration capabilities with Outlook so that users can manage e-mail and calendaring tasks in either ACT! or Outlook, while still ensuring that the data is recorded in the history of the ACT! contact record. ACT! 2010 has enhanced existing integration features and added additional capabilities to enable seamless transitions between the two applications.

There are various ways to capture the e-mail and calendaring history from Outlook within ACT!. The next paragraphs will explore these options in more detail. When an e-mail is sent, whether using the ACT! E-mail Client or Outlook, you can set up ACT! to record a history on the contact record.

Setting up ACT! Integration with Outlook

Outlook Integration features are configured using the Setup Assistant which runs immediately after installation. In ACT! Premium for Web, this feature is found in the preferences area under E-mail Setup. The Setup Assistant allows users to select Outlook as their email editor, and select which ACT! databases should be used by Outlook as Outlook address books. The Setup Assistant also prompts the user for options on how Outlook messages should be recorded to History in ACT!, and settings to copy calendar items between ACT! and Outlook.

Using the Setup Assistant

The Setup Assistant in ACT! runs when you have first completed an install. This wizard gives you the opportunity to fully configure settings and preferences for integration with Outlook. The Setup Assistant can be accessed anytime after installation from the Help menu. NOTE: The Setup Assistant was previously called the Getting Started Wizard.



Figure 1 – ACT! Setup Assistant

If Outlook is installed on the machine, then the Setup Assistant will recommend choosing Outlook as the e-mail system for ACT! to track messages. See Figure 2.

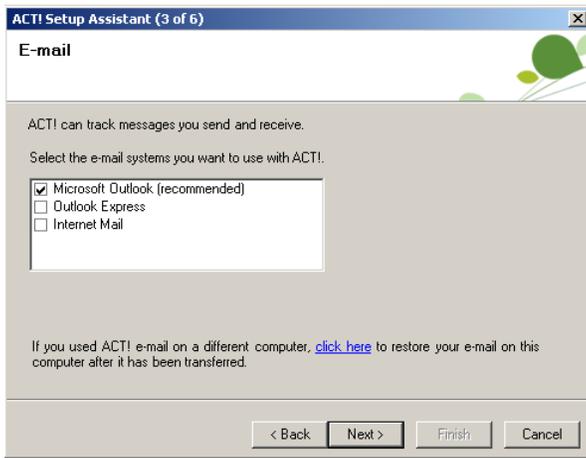


Figure 2 – ACT! Setup Assistant

Using ACT! Databases as Outlook Address Books

The Setup Assistant can be used to add ACT! databases as an Outlook Address Book. This function allows ACT! and Outlook to share information about contacts in ACT! so you can access them through each application. For example, you can address an e-mail in Outlook to a contact in ACT!, or you can attach an e-mail to a contact in ACT! as a history.

To attach an ACT! database as an Outlook Address Book, use the dialog box shown below in the Setup Assistant. You can attach up to three ACT! databases as Outlook Address Books. One ACT! database must be selected as the default address book for Outlook to use. You can change this at a later time by using the setup assistant in the Help menu again and selecting a different default database in the setup assistant wizard. In ACT! Premium for Web, this feature is found in the preferences area under E-mail Setup

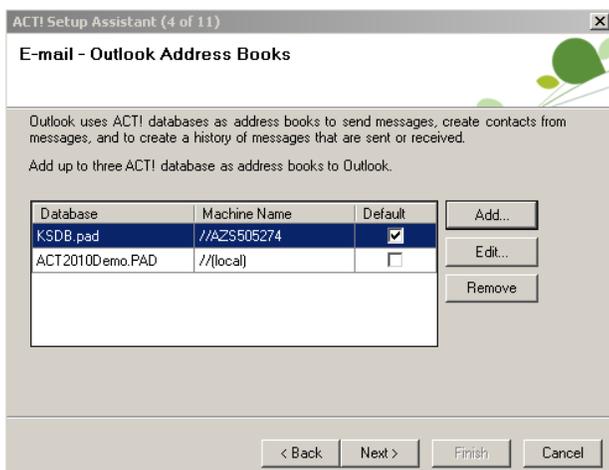


Figure 3 – ACT! Setup Assistant

Choosing E-mail Editor

There are two approaches to using e-mail within ACT!. Users can send e-mails from the built-in e-mail editor in ACT! (ACT! E-mail Editor) using Outlook as the mail client, or they can send directly from Outlook. It is recommended to use Outlook directly but if you require additional features like attaching emails to group and company records, the ACT! E-mail Editor may be a better fit. When users set up e-mail preferences in ACT!, they can choose either the ACT! e-mail program or Outlook as the e-mail client.

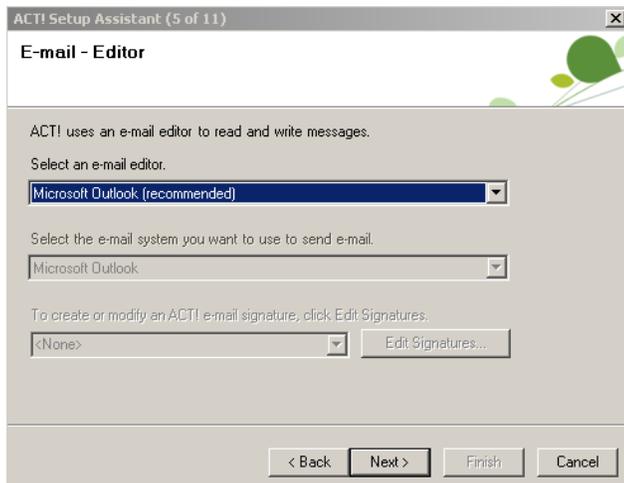


Figure 4 – ACT! Setup Assistant

1. **Using the ACT! E-Mail Client:** The ACT! E-Mail Client is an interface that sits in front of Outlook, Outlook Express or Internet Mail. When E-mail is accessed in ACT!, this interface appears. This interface has additional functionality over Outlook and other forms of e-mail integration. For example, users can create ACT! activities from e-mails, quickly look up contacts from e-mails received, and attach e-mails to group or company records. NOTE: The ACT! E-Mail Client is only available in ACT! and ACT! Premium. It is not available in ACT! Premium for Web.
2. **Direct integration with Outlook:** Users may want to send e-mail messages from within ACT! using Outlook rather than the ACT! E-Mail Client. With this option, all functions, from mail merge to clicking on hyperlinks, use the Outlook e-mail client. For example, a user who has chosen Outlook as the e-mail client views a Contact record in ACT! and clicks an e-mail hyperlink, Outlook opens with the contact's address in the To field. The ACT! E-Mail Client is not visible. For someone who uses Outlook frequently, this method may be more comfortable and more closely fit how they work.

E-mail Preferences Drive Application Behavior

The e-mail preference will drive certain application behavior. If a user chooses to use the ACT! E-mail client, it will launch whenever the user does any of the following:

Click on an e-mail address in a contact record;

- Click on Write E-mail button on the global toolbar; or
- Click the Write menu, and then click E-mail Message.

When a user performs any of these actions, either ACT! e-mail will open with the user's Outlook folders showing, or a default ACT! e-mail template will open.

When a user chooses to use Outlook e-mail, performing any of these actions will open Outlook. A user will see either their Outlook folders or the default Outlook e-mail template with the contact name in the To box.

Users can set up several e-mail clients, however, when they choose Outlook e-mail as their preferred e-mail client, they cannot use any other e-mail program, such as Outlook Express or Internet Mail. Therefore, someone who wants to use more than one e-mail program within ACT! should select ACT! e-mail as their preferred e-mail client.

Methods for Recording E-mail History

Once a user has set up the integration between ACT! and Outlook, she can change the default method for handling e-mail history in ACT!.

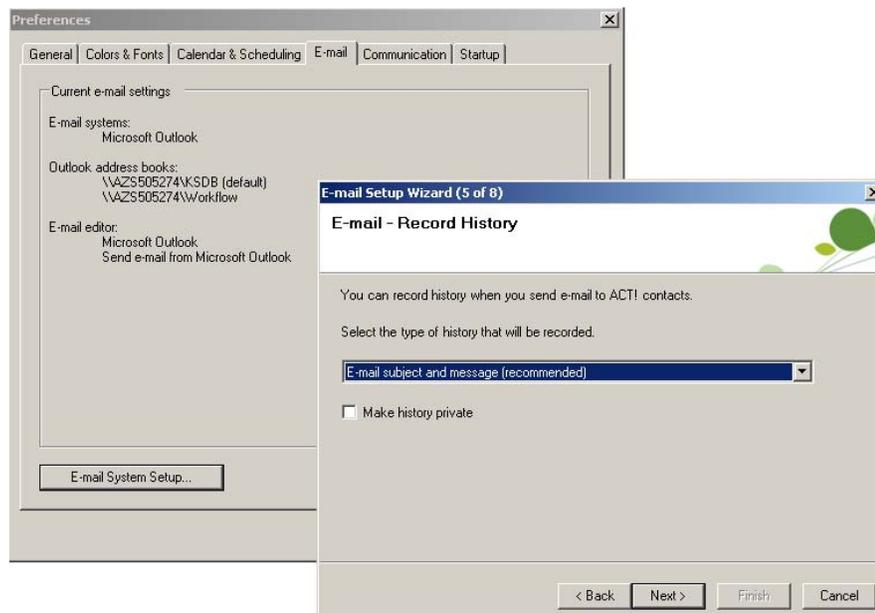


Figure 5 – History Options in ACT! 2010

Default history options are Record History or Do Not Record History. When a user selects Record History, they can select one of three options for what ACT! records: recording the date, time, and subject; recording the date, time, subject, and message text; or, saving the entire e-mail (including attachments)

User Tip: To record a history when sending an e-mail, a user must select a contact from the default database. To attach the history to a contact that is not in the default database, use the selection dialog to select the intended database.

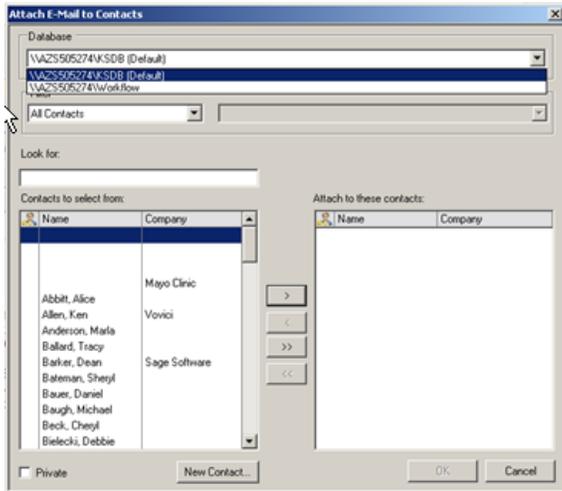


Figure 6 – Attach E-mail to Contacts

At any time, users can override default history options when sending e-mail using the ACT! toolbar within Outlook. This toolbar includes a dropdown where Record History or Not Record History can be selected. Figure 8 below shows an example of the ACT! toolbar with the Record History drop-down.

E-mail interactions are recorded as line items on the History tab of the contact. This establishes a historical record that can then appear on reports within ACT! such as the Contact report and the Notes and History report. Having this record ensures that everyone with visibility to the record knows about all interactions with a contact.

Users can also record incoming e-mails to ACT! Contact records to achieve continuity in contacts' interaction history. Using the Attach E-mail to Contact icon on the ACT! toolbar in Outlook (versions prior to 2007), an incoming e-mail can be attached to a contact record. For Outlook 2007, the Attach E-mail command can be found in the Add-ins Ribbon. This is especially useful in situations where not everyone in the organization has access to other users' Outlook files. You can also attach multiple emails at once using the Quick Attach feature in ACT!. From Outlook, select the email(s) you want to attach to your database and click on "Quick Attach" in the menu bar. See Figure 7.2.

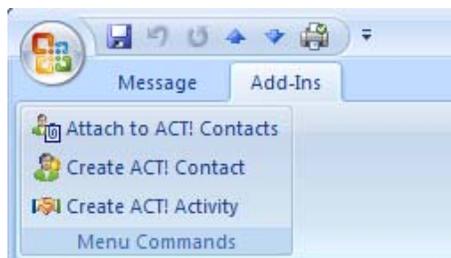


Figure 7.1 – ACT! Icons on E-mail Messages in Outlook 2007

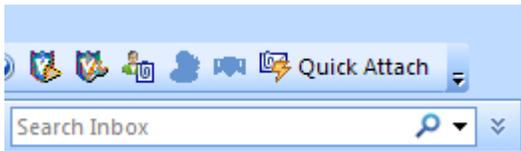


Figure 7.2 – Quick Attach Icon

Sending E-mail to an ACT! Contact

If Outlook is setup to be your e-mail editor, you can quickly send an email from ACT! by performing any of the following:

- Click on an e-mail address in a contact record;
- Click on the Write E-Mail icon on the global toolbar; or
- Click the Write menu, and then click E-mail Message.

To send an e-mail to multiple contacts, you can perform one of the following:

- Navigate to a Group or Company and select the Write E-Mail icon on the global toolbar;
- Select multiple contacts from the Contact List view and select E-mail Message from Write menu
- Perform a mail merge to a contact lookup, group, or company

If you are in Outlook, you can send an e-mail by clicking on the To icon to find the correct name or start typing in the field to the right of the To box. The Outlook type-ahead feature will find the name using all available address books, including ACT!.

Recording E-mail History on Outgoing Messages

It is important to see what emails have been sent to which users. To see this in the context of the Contact Detail view, users can record a history from that email. Users have several methods of recording e-mail histories. In the Setup Assistant, users can set default preferences for all of them. Users may select four different options for recording a history when an e-mail is sent (see below).

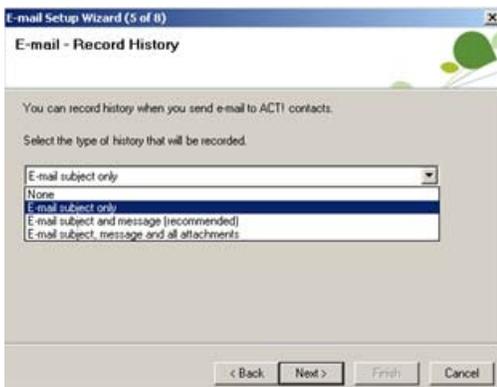


Figure 8 – ACT! Setup Assistant

Record History options:

- None
- E-mail subject only
- E-mail subject and message (this is the recommended option)
- E-mail subject, message and all attachments

When an e-mail is sent to a contact that exists in any of the ACT! databases that are attached as Outlook Address Books, that e-mail will show up in the history for that particular contact. See Figure 9. The default option can be changed on the fly by accessing the dropdown on the e-mail toolbar (on the Add-Ins tab in Outlook 2007).

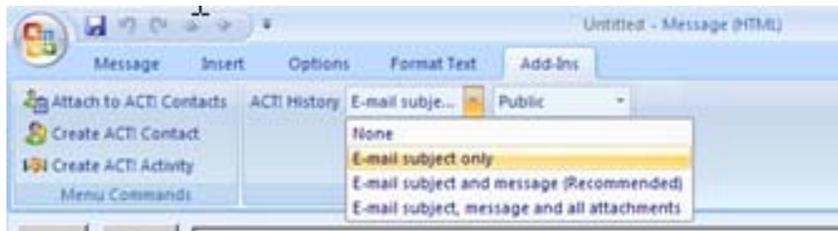


Figure 9 – Default E-mail History Option

Activities		Opportunities		History		Notes		Documents		Groups/Companies		Secondary Contacts		Personal Info		Contact Access		User Fields		Web Info		Marketing Results	
Dates: All Dates		Types: All		Select Users																			
Date	Time	Result	Regarding & Details	Record Manager		Share With																	
10/27/2009	4:11 PM	E-mail Sent	Subject: The Tech One Opportunity	Katharine Stalcup																			

Figure 10 – History Tab in ACT! Showing E-mail History

NOTE: Once a history is created, it is visible for all users in the ACT! database to see if they have access to that contact record. If something needs to be private, you can select "Private" in the Outlook dialog or just default to making that history record private every time through E-mail setup preferences.

Recording E-mail History on Incoming Messages

There are three ways to record an e-mail history from incoming messages:

- Attach email
- Quick Attach
- Outlook Rules

Attach E-mail

Users can choose to manually attach e-mails as ACT! history records by selecting or opening a message and clicking the Attach to ACT! Contact button on the Outlook toolbar. This method provides the most flexibility as the user can choose which database and which contact(s) to attach the e-mail to, regardless of the content in the To: and CC: fields of the e-mail. If the contact's email address can be found, it will select that contact by default but you can modify this.

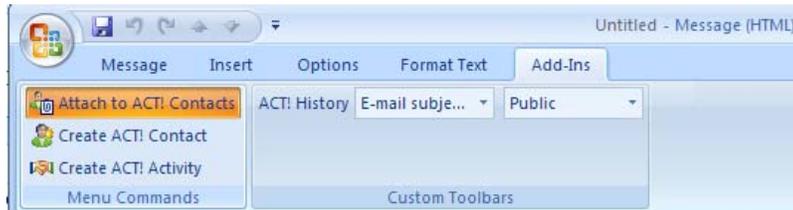


Figure 11 – Attach E-mail to Contacts

Quick Attach

The second method, called Quick Attach, allows users to select a batch of e-mails from different senders and record history in ACT! “en masse.” Using this method, the user selects the Quick Attach function:



Figure 12 – Quick Attach

When clicked, e-mail histories are added to the contacts defined in the Quick Attach preferences.

The messages will be queued up and processed by a background process so the user can continue using Outlook normally. A progress dialog will appear in the Windows task tray to provide a summary of attached messages as well as any errors (messages that could not be attached). The Quick Attach function also allows a setting to create contacts automatically if they are not already in ACT! Default preferences for the manual and Quick Attach methods are set using Setup Assistant. See Figure 13.

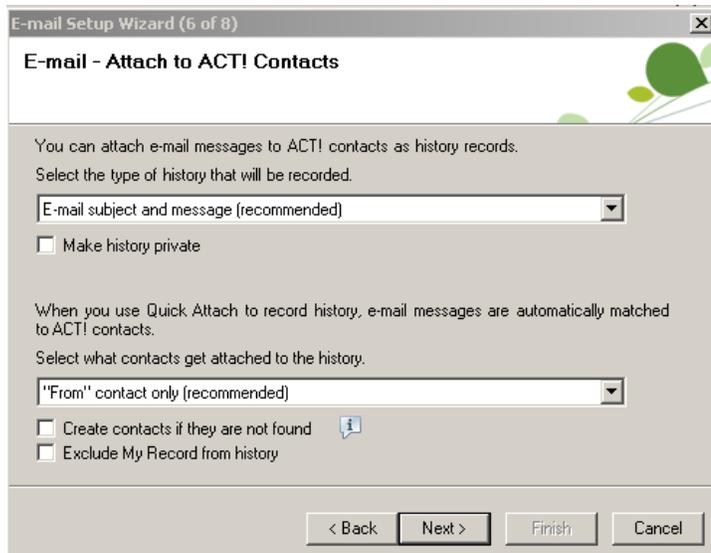


Figure 13 – E-mail Setup Wizard

Creating an ACT! Contact from an Outlook E-mail⁴

Users of ACT! 2007 to 2010 can create a new ACT! contact directly from an Outlook e-mail message. The following is a real-world example of how to leverage this feature. A sales manager receives an e-mail from a prospect she met at a trade show. The e-mail refers the sales manager to another organization in the prospect's company.

1. Using the integration between ACT! and Outlook, the sales manager opens the e-mail and clicks on the Create ACT! Contact icon on the task bar.
2. ACT! creates a Contact record based on the name and e-mail address in the e-mail.
3. ACT! automatically populates the Contact name and E-mail Address fields.
4. The Sales Manager can add information to 10 additional pre-defined fields, such as Company, Address, and Phone Number, to complete the Contact record.

⁴ This feature is not available in ACT! Premium for Web.

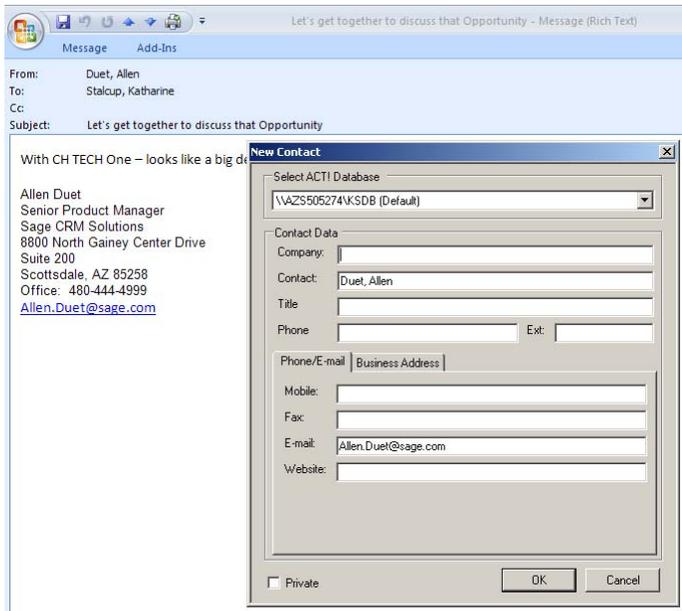


Figure 14 – Creating an ACT! Contact from Outlook 2007 E-mail

ACT! will even check for duplicates before adding a contact. This feature allows users to quickly and efficiently add new contacts, while ensuring a clean, accurate database. To turn on duplicate checking, navigate to the preferences area in the general tab.

NOTE: If an incoming e-mail follows Internet protocol, with a user name listed after the e-mail address on the From line, ACT! will populate the Contact field with the name that it finds on the formatted e-mail address line. For example, an e-mail with the From line reading “John Smith’ john.smith@sage.com” will populate the Contact field in the dialog box with “John Smith”. If however, the e-mail From line contains only the e-mail address, ACT! will populate the Contact field with the e-mail address. See Figure 15 for an illustration of the dialog box.



Figure 15 – Adding Contact Data Fields from Outlook

ACT! and Outlook Contact Integration

A user may have contacts in an Outlook address book that are not in ACT!. To truly realize the contact-specific functionality in ACT!, the contacts need to be in the ACT! database. Using the Import wizard in ACT!, users can import Outlook contacts and activities into the ACT! database.

When using the Import Wizard, users can choose which contacts to import – Outlook or Exchange. Existing appointments and tasks will be imported as ACT! Activities. Notes in Outlook will be imported as ACT! Notes. Journal Entries will also be imported as ACT! Notes.

ACT! Premium for Web Integration with Outlook

Outlook may be used with ACT! Premium for Web with no additional configuration, as long as the user has Outlook installed on their computer and the administrator has already configured Outlook. The Web client user will have to select Outlook as their e-mail client, and there are some personal preferences the user may want to set. If users want to attach e-mail messages and record histories to ACT! contacts, they must download a file when they select Outlook as their e-mail client in ACT! Premium for Web. During set-up, users will have the option to download the file. On the same set-up screen, the user can choose Outlook as the primary e-mail program.

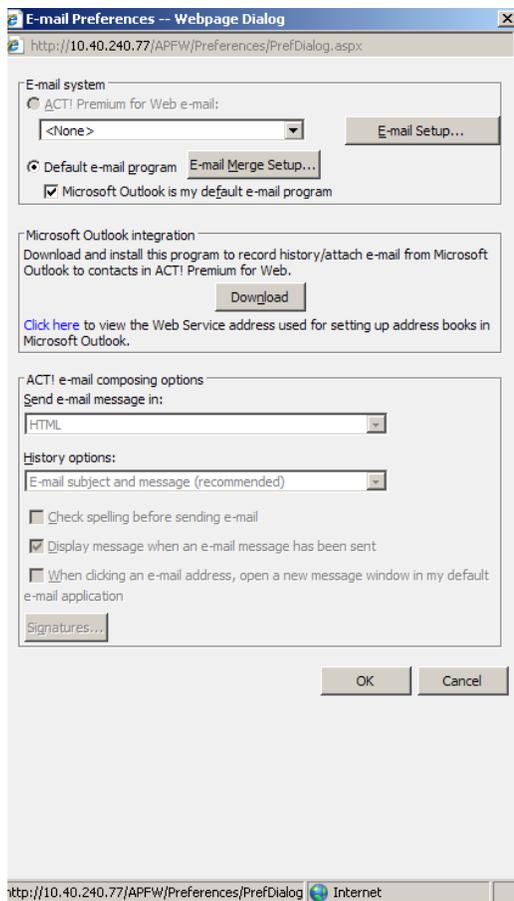


Figure 16 – ACT! Premium for Web and Outlook set up

Once the user has selected Outlook as the default e-mail program, the Outlook e-mail experience is the same as with ACT! Premium, with a few minor exceptions. For example, the user cannot create a new ACT! contact from an Outlook e-mail in ACT! Premium for Web or use Outlook calendar integration. As with ACT! Premium, clicking on an e-mail field in ACT! Premium for Web opens an Outlook e-mail client. There is an ACT! Premium for Web-specific toolbar for setting history options. And, users can add a contact to ACT! Premium for Web from Outlook in a manner similar to ACT! Premium.

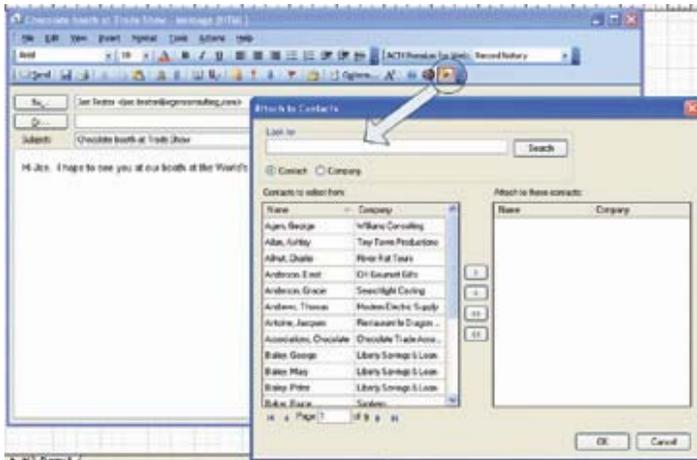


Figure 17 – Attaching an E-mail to a Contact While Using ACT! Premium for Web

ACT! and Outlook Calendar Integration⁵

There are two ways to integrate with Outlook Calendar:

1. Send ACT! invitations as iCalendar format – used when sending meeting requests from ACT! to non-ACT! users
2. Outlook Calendar Copy – used when others are scheduling for you in Outlook

Sending Invitations with iCalendar

Users who work in environments with non-ACT! users will find this feature especially useful. This feature allows you to use your ACT! calendar as your primary tool for scheduling while sending calendar invitations in a standard format that most other calendar programs recognize called iCalendar. This format will not only work with Outlook, but also Lotus Notes®, Google Calendar™, Apple® iCal® and most other standard electronic calendar formats.

No setup is required to use this feature. The only thing that is required is to have a contact with an email address attached to it. When scheduling the meeting with the contact, check the box on the schedule activity dialog that says “Send activity email to contacts” directly below the contact(s) with whom you are scheduling the meeting. An iCalendar object will be formed based on the information you have added to the calendar invitation and it will be sent to the contacts you have specified.

⁵ This feature is not available in ACT! Premium for Web.

Figure 18 – Schedule Activity

Setting Up Outlook Calendar Integration

Users who maintain calendars in both ACT! and Outlook usually want to be able to view all calls, meetings, and to-dos in both applications. Users can accomplish this with ACT! and Outlook calendar copy⁶.

This ability is a terrific time-saver as managing consolidated calendar information is more efficient. It reduces errors, like double-booking or even missing appointments, and lets users realistically plan their day by balancing appointments and tasks.

There are two ways to utilize this goal. First, users can choose to automatically create any new Outlook invitations they receive in their default ACT! database. For users that work in an environment where Outlook is a primary tool, this is a great feature to make sure that all of your Outlook events are also on your ACT! calendar. This is set up in the preferences dialog in the email tab. From that dialog, you can configure which application shows the alarm (ACT! or Outlook) and also what the right amount of control is for you when you are scheduling activities in ACT! from Outlook. The options are:

- Choose to have activities automatically created on your ACT! calendar every time you receive an Outlook activity
- Display the ACT! Activity dialog every time you receive an Outlook invitation. NOTE: This will allow you to modify the details of the appointment before scheduling it in ACT!.
- Turn off the feature entirely

⁶ This feature is not available in ACT! Premium for Web.

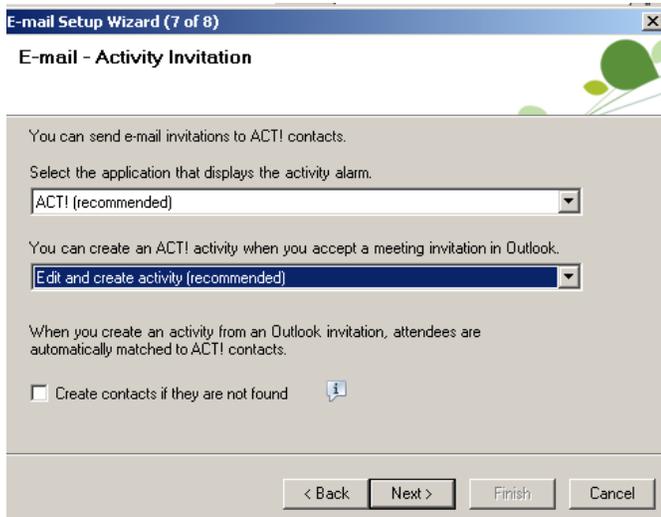


Figure 19 – E-mail Setup Wizard for Activity Invitation

The second method of keeping your Outlook and ACT! calendars in sync is Calendar Copy⁷. ACT! and Outlook calendar copy duplicates ACT! and Outlook calendars. Users can view Outlook activities on ACT! calendars, in the Task List, or in the Activities tab. ACT! Premium offers the additional capability of running a scheduled or automated task to update the calendars.

You can set this up through the Setup Assistant. Each time you perform a calendar copy, you can specify date range of activities to update. You can change the date range each time you perform a calendar copy.

NOTE: When a user imports Outlook calendar items (the current user's calendar and tasks) to an ACT! database, the items are associated to the user's My Record in ACT! and not to a specific contact record. To associate Outlook calendars and tasks with an ACT! Contact, the user will need to open that calendar entry and then associate the activity with a Contact, Group, or Company. Once an activity is associated with a Contact, Group, or Company, there is a history, by Contact, of these activities. This is key to keeping all of the data in one place to improve customer relationships and processes.

In this user scenario, the assistant to Chris, the marketing manager, plans to use ACT! to schedule follow-up events to the trade show. To include the product managers who will need to be present, ACT! and Outlook calendars need to be synchronized. That way, the events show up in both calendars, since not everyone has access to ACT!.

Chris' colleagues use Outlook to schedule additional follow-up meetings for Chris, who uses ACT!. Leveraging ACT! and Outlook calendar copy, these meeting requests will be added to Chris' ACT! calendar. Thus, Chris can use her favorite calendar (ACT!), and departments who only use Outlook calendars can still easily schedule meetings with her.

⁷ This feature is not available in ACT! Premium for Web.

ACT! Integration with Word

Users can create documents, such as letters, memos, and fax cover sheets, in ACT!. When Word is set as the default word processor, the word-processing capabilities of ACT! are greatly enhanced.

Using Word, documents can be attached to ACT! contacts via a custom ACT! menu within Word. See Figure 20.1. Once a document is attached to a contact, users can quickly locate that document, whether it's a letter, memo, presentation, proposal, quote, etc.

For frequently used content, users can create a template to make document creation easier. When documents are created for a contact using one of these saved templates, it is recorded as history item for that contact. This provides a complete history of all interactions with each client, including letters, faxes, and memos.

A template can include standard contact information, but also other data associated with contacts, like product detail and last meeting held. In fact, data in any ACT! field can be incorporated into Word templates. By creating standard templates with embedded data, and making them available to users, organizations can more easily enforce standard contact communication processes.

Attaching Word files to ACT! Contacts

When a user sends a letter or memo to a Contact using a Word template, they can attach the document to the Contact.

A user also may want to associate documents created outside of ACT! with a specific contact. The user can use the Contact menu to attach these documents, which will then appear on the History tab. The user can simply double-click on the attachment icon to launch Word and open the document.

When a user has selected Word as the default Word processor, the integration adds an ACT! menu to Word. Users can use this menu to attach a document to a contact record.

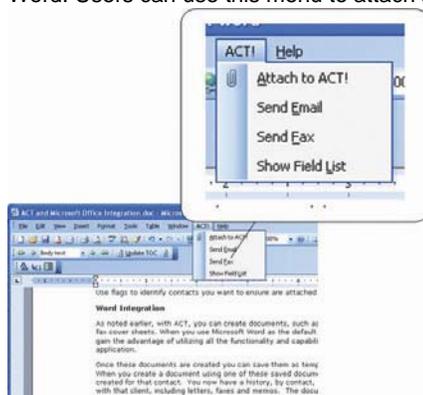


Figure 20.1 – ACT! Menu in Word Versions Prior to 2007

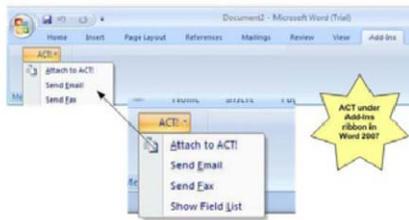


Figure 20.2 – ACT! Menu in Word 2007

New to ACT! 2010 is the ability to set Word as the default word processing editor in ACT! Premium for Web. To set up Word as the default word processor, access the preferences panel and click on the “word processor” link. This will allow you to choose either Microsoft Word or the ACT! word processor as the default editor.

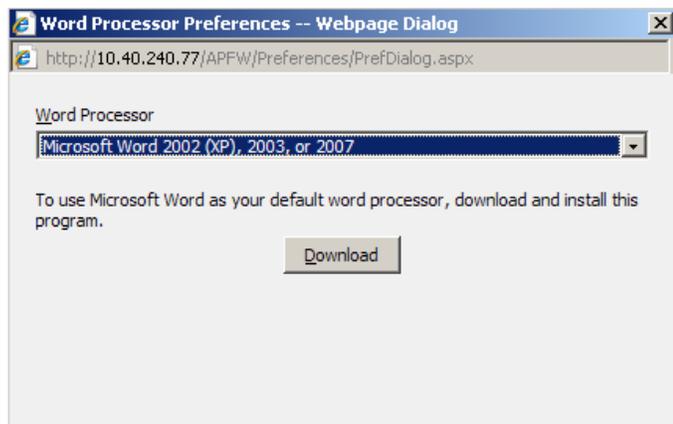


Figure 21 – Word Processor Preferences

From the ACT! menu, users can choose to send the Word document via e-mail to contacts in ACT!. Any embedded ACT! field will automatically be filled in with the appropriate data when the document is opened. The Show Field list quickly identifies embedded ACT! fields throughout the document. However, this option is only available when the user is working on a template.

For example, a marketing manager needs to send out a customized brochure. The brochure will include a coupon for products that will be available for sale at a trade show. She creates this brochure using a Word template and embeds an ACT! field that identifies products specific to a client. Besides details about the trade show, the Word document contains the relevant contact fields, like company and contact name, plus ACT! fields containing product information. The coupon section of the document includes the contact name field, to personalize the form, plus data from product fields.

A communication like this will drive additional traffic to the company’s trade show booth, improve the prospect’s experience at the show, and be recorded in the contact history, all with little effort.

NOTE: When sending a mail merge to multiple ACT! Contacts, ACT! cannot attach a document to those Contacts. However, ACT! will record the subject of the document in the Contacts’ history, and the document can be attached in the history manually. Another way to attach the document is to create a Group based on the lookup used for the mail merge and attach the document to that Group.

Attaching Word Files to the ACT! Documents Tab

Word files can also be attached to the Documents tab in ACT! Contacts, Groups, Companies, and Opportunities and opened from within ACT! (as long as Word is installed on the PC).

Users can add Word files to the Documents Tab either by using the Add Document button on the Documents tab or by dragging the file from Internet Explorer or the desktop.

Designing Word Templates Using ACT! Data

ACT! gives users the capability to create custom Word templates that incorporate ACT! fields. Using the Edit Template function, users can add text and insert ACT! fields in the template where appropriate. These templates are then available from the Write menu in ACT!.

A real-world example is a sales rep sending follow-up letters to prospects. The sales rep wants to include the prospects' names, date of the initial meeting, and the name of the sales rep in the letter. In this example, the rep would include three fields from the Contact Record – Contact Name, Last Meeting Date, and Sales Representative.

To develop this template, the sales rep copies the original Word document text and pastes it in a new ACT! template. The Mail Merge fields dialog box opens automatically when a new template is created. ACT! locates the three fields using the E-Mail Fields dialog box and incorporates those fields into the template in the correct positions. The rep saves the template, knowing he can now access it from the Write Menu under Other Document Templates. Here are the steps for creating a template based on an existing Word document.

- Open the original document in Word.
- Highlight and copy the text that needs to be incorporated into the new ACT template. Next, in ACT!, click on the ACT! Write menu, and choose Edit > New Letter/E-mail Template. ACT! opens a new template and the Mail Merge fields dialog box.
- Paste the copied text into the body area of the template.
- Add any mail merge fields, in the appropriate location, using the E-Mail Fields dialog box.
- Save the template, giving it a name that identifies it correctly. It will now appear in the Write menu under the Other Document Templates option.

User Tip: To reopen the Mail Merge Fields dialog box in versions of Word prior to 2007, click the ACT! menu and choose Show Field List. In Word 2007, click on the ACT! icon under the Add-ins ribbon.

The sales rep can use this document template to create letters to a single contact, in mail merges to groups or lookups, or as an e-mail. By using standard ACT! fields, the template can be used again after the rep's next round of sales calls. Even if the sales rep leaves the company, other reps can use the template. This is also an excellent way for sales management to standardize communications across a team of reps.

When creating a new template, users can use an existing template as a model. To leverage an existing template, users can select Write> Edit Template, choose the original letter template, click Save As, and enter another name for the template. This maintains original template as-is and provides a new template that follows company standards.

Using Word as the word processor lets users include graphics in templates and documents, like company logos for letterhead or a scanned signature for letters.

Another example of a template document is a quote template. The quote template has two parts, a Word document and an embedded Excel spreadsheet that holds the opportunity data. Users can change both the text in the Word portion of the quote and the Excel portion of the template, if Excel is installed on their computer. (Integration with Excel will be covered in the Excel section of this document.)

User Tip: When using an existing ACT! Word template to create a new template, a user can see what ACT! fields are in the template without editing the template.

Here are some helpful shortcuts for working with Word field codes:

- To show Word field codes while in a field Click Shift+F9. (Shift+F9 is a toggle – clicking it turns it on or off.)
- To show all codes in the document Click Ctrl+A and then Shift+F9.
- To toggle Field codes on/off Alt+F9.
- To see the data and the field codes at the same time:
 - In Word versions earlier than 2007: Open a second window by clicking Window> New Window. Then, in one of the open windows, click Tools> Options. On the View Tab, click the Field Codes box. There are two open windows, one that shows data, and one that shows field codes.
 - In Word 2007, click on View>New Window; click on the Microsoft Office button and select Word Options>Advanced. Under Show Document Content, check the Show Field Codes Instead of Their Values box.

ACT! Integration with Excel

Exporting Excel Data from ACT!

ACT! has an excellent integration with Excel that enables a user to export data from any Contact, Company, Group, Opportunity or Task list in ACT! to Excel, with just one click. The columns in an Excel spreadsheet will match the columns (or fields) shown in the ACT! list. To export a specific set of fields, users simply add the appropriate columns to one of the list views in ACT! and choose Tools> Export to Excel to create the spreadsheet. For example, in the Contact List view, the standard columns are Contact, Company, Phone, Cell, E-Mail, Address, City, State, Zip, and Country. These are the columns that would appear in the Excel spreadsheet after an export from the Contact List view.

This is a one-way process only. Importing data from Excel into ACT! is covered later in this document.

User Tip: Administrators and Managers have default privileges that allow exporting to Excel. Standard do not have this privilege by default, but Administrators can grant these privileges by user as needed.

Attaching Excel Documents to Contacts and to the Documents Tab

Attaching Excel documents to contacts is similar to attaching Word documents. There are three basic methods for doing this:

1. Drag and drop a spreadsheet from the Windows® file system to the Documents tab.
2. Click on the Add Document button on the Documents tab.
3. Use the ACT! menu from within Excel (or Add-Ins ribbon in Excel 2007).

However, unlike in Word, there is no way to attach an Excel file to a Contact record during a mail merge.

Mapping ACT! Fields in Excel

Users can create an Excel spreadsheet and link cells in the spreadsheet to fields in ACT! by first adding the spreadsheet to the ACT! Documents tab. Then, the user maps cells in that Excel spreadsheet to ACT! Contact, Group, or Company fields. This uses the Object Linking and Embedding (OLE) integration of Excel and ACT!. If data in a field in ACT! changes, the Excel file will be updated automatically when the spreadsheet is opened.

For example, if a user wants to map ACT! fields to Excel is for a product spec sheet. A purchasing manager may want to have a spec sheet that lists the suppliers he tracks as contacts in his ACT! database. To accomplish this, he:

1. Sets up the first row of the spreadsheet to include the appropriate ACT! fields, including company name, contact name, phone number, and product-specific fields.
2. After entering these fields in the first row, the purchasing manager saves the spreadsheet.
3. He can then copy his spreadsheet into the Document tab for all the applicable contacts.
4. When he clicks on the Map to Excel button in the Document tab in ACT!, these fields are updated on the spreadsheet.

This spreadsheet can be of any length and integrated with any number of ACT! fields. The advantage of this integration is that whenever a field changes in ACT!, the data in the Excel spreadsheets refreshes with one click.

To map ACT! fields to an Excel spreadsheet⁸:

1. Select the Documents tab make sure there are periods after each bulleted item.
2. Select a spreadsheet.
3. Click Edit Document. The document opens in Excel.
4. Identify a cell to map an ACT! database field to.
5. Click Map to Contact, Map to Company, or Map to Group, as applicable, from the ACT! menu (for Excel 2007, use the ACT! icons on the Add-ins Ribbon).
6. When the Map fields dialog box opens, choose the appropriate field and click Add. ACT! will add the field name with angle brackets in the Excel cell.
7. Repeat this process for any additional fields, save the spreadsheet, and click Close when done.
8. To refresh the spreadsheet fields, while in the Document tab, click on the Map to Excel option in the middle of the screen.

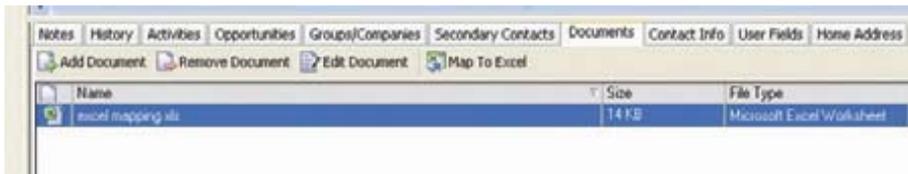


Figure 22 – Example of the Map to Excel button

⁸ This feature is not available in ACT! Premium for Web.

Understanding the Pivot Tables in the Opportunity List Export

When exporting data from the Opportunity List, ACT! creates two additional spreadsheets within the workbook. One spreadsheet is a Pivot Table, and the other is a Pivot Chart. These pivot tables allow for drilling down into the data exported from ACT!.

What is a pivot table?

A pivot table creates a summary of data from many records, which can easily be manipulated and sorted based on different criteria. Pivot tables are an excellent tool for dissecting information.

Pivot table reports are interactive tables that let you work with information so you can see how the data fits together. By comparing data, users can identify patterns, trends, and relationships.

Simple clicks are all that is required to move or “pivot” the rows and columns of data from one view to another. Pivot tables let users organize and summarize data in a hurry. In addition, users can drag the buttons to a new position to quickly rearrange the data.

Pivot tables can be used to analyze sales opportunities recorded in ACT!. To build a spreadsheet containing two worksheets with pivot tables and pivot charts, select Tools > Export to Excel from the Opportunities List in ACT! and export the ACT! data. These tables and charts let you manipulate the ACT! opportunity data by customer, product, record manager, status, or date.

The following Figure shows an example of data exported from the ACT! Demo Database. The original pivot chart showed all opportunities. To get to the view below, the user clicks on the cell next to Status and selects Open to show the data that reflects only open opportunities.

Record Manager	Count of Record Manager	Sum of Total	Sum of Weighted Total
Allison Mikola	24	\$62,869.29	\$50,002.52
Chris Huffman	31	\$49,284.08	\$29,710.73
Ernst Anderson	9	\$14,163.64	\$10,390.04
Fred Fenderline	2	\$3,874.65	\$1,376.66
Jonathan Sommer	3	\$6,163.50	\$3,590.40
Sarah Whiting	17	\$29,176.77	\$20,690.83
Grand Total	86	\$166,541.92	\$115,761.19

Record Manager	Count of Record Manager	Sum of Total	Sum of Weighted Total
Allison Mikola	9	\$20,054.40	\$7,572.46
Chris Huffman	13	\$25,000.74	\$10,560.98
Ernst Anderson	4	\$4,920.00	\$2,460.75
Fred Fenderline	2	\$3,874.65	\$1,376.66
Jonathan Sommer	3	\$6,163.50	\$3,590.40
Sarah Whiting	4	\$6,790.00	\$3,000.00
Grand Total	35	\$66,803.29	\$28,561.25

Figure 23 – Opportunity Pivot Table

Pivot Charts

The same data that is created in a pivot table can be used to create pivot charts. Again, using simple keystrokes, users can produce excellent charts for presentations and reports. The following Figure shows an exploded 3D pie chart of opportunities by record manager.

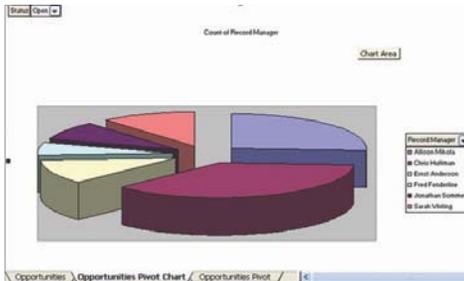


Figure 24 – Opportunities Pivot Chart

Preparing Data for Import Using Excel

Are there easy ways to get contact data into ACT!? Yes, the ACT! import tool allows data import to an ACT! database from another ACT! database, Outlook, or text files. However, users should make sure the data is clean prior to import - it may need manipulation to correct problem areas.

Excel is an excellent tool for cleaning up data prior to importing it into ACT!. Once a user reviews and corrects the data in an Excel spreadsheet, they can save the data as either tab-delimited or comma-delimited text by selecting File > Save As (in Excel 2007, the user would click the Microsoft Office button and select Save As). Both tab-delimited and comma-delimited text formats are valid formats to import contact information into ACT!. NOTE: Some data, like lists purchased from list houses, will already be in a text format. These files can be opened directly in Excel if the data needs to be manipulated prior to importing it into ACT!.

Users should make sure that the names of columns in the first row of the Excel spreadsheet exactly match ACT! field names. During import into ACT!, you can map different column names to fields. However, if ACT! “sees” a column name that exactly matches an ACT! field, it automatically maps the column to that field.

User Tip: To reduce confusion and as a memory aid, add a column to the spreadsheet from which you are importing data. Populate that column with text that identifies the spreadsheet data. Use one of the User fields as the destination field for this information. This field helps identify the data during lookups in ACT! and can also be used to dynamically add the contacts to a defined group in ACT!

Enhancing the ACT! Quote Template

As noted earlier, the quote template has two parts. The main document is a Word document, but there is an embedded Excel component containing the quote details. In ACT!, the embedded quote details are controlled by the Quote.XLT file. You can manipulate this file to add text or incorporate additional items, such as local sales taxes, in a quote.

To add local sales tax to the quoting template, follow these steps.

1. First, create a backup copy of the Quote.xlt. (This template can be found in the Templates folder in the ACT! supplemental files. For example, if an ACT! database is called MasterContacts, there will be a shared folder called \Mastercontacts-database files\Templates on the server or computer where the database resides.)
2. Next, open Excel, and click File > Open (in Excel 2007, click the Microsoft Office button and File > Open), and browse for the Quote.xlt template.
3. In the Open dialog box, select ".xlt files" in the "files of type" pull-down menu. When the template opens, the spreadsheet will be formatted as it appears when a quote is generated in ACT!.
4. Locate the cell that contains the 0.000% value for taxes and change it to reflect his local tax rate (this is usually located in Cell D29).
5. Optionally, add a disclaimer at the bottom of the quote or add text regarding terms and conditions. NOTE: The number of rows is set and cannot be modified.
6. To finish the process, the save and close the template and test it to ensure the taxes are calculating correctly.

Additional Techniques for ACT! Integration with Excel

Sorting Tips

When importing data into ACT!, users need to consider how the data will be organized. For example, several contacts may be associated with the same organization or company. Before importing Excel data into ACT!, it is a good idea to create a separate spreadsheet that contains only company records, to ensure that the company data is imported properly.

To start, copy all the contact data from a spreadsheet and paste it into a new spreadsheet in the same workbook. Then, highlight all the data in the spreadsheet and sort by Company name. Once sorted, it's easy to eliminate any duplicate company records. While ACT! will allow duplicates during an import, it slows down the performance during a lengthy import—removing duplicates up front will reduce import time. NOTE: You can use this process for any set of records.

A best practice for importing Company Records with multiple contacts is to import the company records first and the Contact Records second.

When a spreadsheet contains several columns of data, it may be necessary to sort columns that are not company or contact fields. In these cases, add a first column to the spreadsheet and number the rows, starting with one, until the end of the file. Use the Fill function in Excel to automatically number the rows and save time. Having this numbered column ensures the data stays together, even when sorted by other fields.

For example, a user may want to determine if there are duplicate entries before importing a spreadsheet into ACT!, including situations where the Contact or Company name is spelled differently so it is not immediately apparent that it is a duplicate record. Sorting on the phone number or address column will help identify these kinds of duplicates. When removing rows due to duplicate records, having the number in the first column helps identify their original location in the spreadsheet.

Data Manipulation Formulas to Improve Data Importing

Data comes in many formats, such as Word documents, text files with columns separated by tabs, and spreadsheets where the data is combined in fields, such as addresses that include city, state, and ZIP code. Understanding Excel formulas can help fix these minor inconveniences.

For example, marketing manager Chris has received a comma-delimited (.csv) file from the trade show organization.

1. Chris opens the file using Excel. (Excel will recognize a .csv file.)
2. When Chris selects File > Open (in Excel 2007, click the Microsoft Office button and File > Open), and selects the file, Excel will automatically open a Text Import window.
3. Chris chooses Delimited as the import option.
4. On the next screen, Chris makes sure to mark the Comma option, so Excel knows where to break the data into columns.

Concatenate Formulas

Chris notices that the Contact name and suffix fields are separate. She wants them to be one field for her import. To join the two columns, she uses the Concatenate command. This command joins cells of information in Excel. In Chris' .csv file, Column A is the Contact name, and Column B is the suffix.

1. To start the process to join the data, Chris adds a column to the right of Column B.
2. The data starts in row two. So, in Row 2, Column C, Chris enters the following formula:
=concatenate(a2," ,b2)
3. This formula joins Column A, Row 2, a comma and a space, and Column B, Row 2 into one cell in Column C. In our example, column A was James Adams and column B was Jr. After the concatenate formula, column C is now James Adams, Jr.
4. Chris copies this formula and pastes it in the remaining rows in Column C – down to the bottom of the data. Now she has one field that she can use for her import.
5. To import the file, Chris knows that all the data must be in text format. So, she needs to turn her formula into text. The easiest way to do this is to highlight Column C and click Edit> Copy (In Excel 2007, she would click Home and then click the Copy icon).
6. Then, with the same column highlighted, she clicks Edit> Paste Special.
7. When the options menu opens, she chooses Values. This will paste text values over her formulas.
8. After that's done, Chris can delete the two columns with Contact names and suffixes.

Proper Function

Chris also notices that everything in the text file is capitalized. Since she is going to be sending out Word letters to these contacts, she doesn't want the data in all caps. The Proper formula fixes data that is all caps. Chris knows she needs to have a column for the formula, similar to the one she created for the combined text (described previously).

1. Column A is in all caps. To correct it, Chris adds a column to the right of Column A. In row 2, she puts the following formula: =Proper(a2). This turns the data in cell A2 in proper case – in other words, only the first letter of the word is capitalized.
2. Chris then uses the process described previously and copies her formula down the entire column.
3. She then copies and uses the Paste Special command to paste her column, repeating for all columns where data is in all caps.
4. If column A had the company name as JAMES ADAMS CHOCOLATES, column B would

now show James Adams Chocolates.

Trim and Clean Functions

Text files often contain extra spaces or non-printable characters which transfer into ACT! contact records when imported. Using the Trim and Clean formulas, Chris can remove those extra spaces and non-printable characters. She uses the method described above, adding a column to the right of the column that needs to have spaces removed. She copies and uses the Paste Special command to change formulas to values.

The following are examples of the Trim and Clean functions – assume the formula is in column B and the data with spaces is in column A:

=Trim(a2)

=Clean(a2)

Transpose Function

Chris may also get a text file where the contact, company, and address data are on separate rows. She needs to have the data spread out across columns so it imports properly into ACT!.

1. Using the Copy> Paste Special> Transpose function, Chris can convert data that is aligned down a column into data across columns.
2. She simply highlights the rows with the data to be moved, clicks Edit> Copy, positions her cursor in the first column where she want the data to be placed.
3. Finally, Chris clicks Edit> Paste Special> Transpose. Her data will now be arranged across several columns.

In Excel 2007, to transpose text, click on the Home icon to open the Home ribbon, select the appropriate text, and click on the Copy icon. Then click on the Paste drop down arrow and select Transpose.

ACT! Integration with Internet Explorer

Using the Web Info Tab

Using ACT! with Internet Explorer, users can find and utilize context-sensitive information from within their database. This is a great feature that allows users to access the vast amount of information on the Web about their contacts from within ACT!. In the Web Info tab on the contact detail screen, users have access to several canned links that pull information from their database to search for relevant data about their contacts on the Internet. To utilize these links, users simply need to click on them.

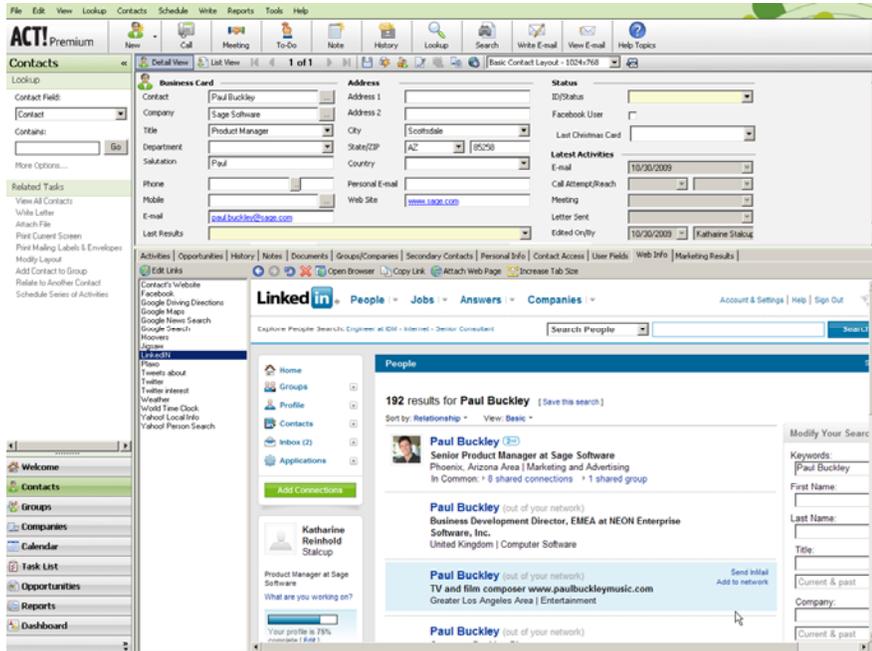


Figure 25 – Web Info Tab

While the links that are shipped with ACT! are useful and provide direct access to informative sites like LinkedIn, Google driving directions and Facebook, this tab comes with a very powerful customization tool. Users can add or delete links in their tab by click on the “edit links” dialog in the tab. A quick add or delete can be done on the primary dialog and if users need to build a link that requires information to be pulled from within their database to construct the link, they can click on the “advanced edit” button.

Constructing a link that pulls information from the database is fairly simple. The steps below illustrate a typical example:

1. Open a browser and go to the site that you would like to link. If, for example, you want to always know what the local time is for one of your contacts, you might use a site like timeanddate.com.
2. If you open this browser and search for “New York” in the browser, the resulting URL in your window will look like this:
3. <http://timeanddate.com/worldclock/results.html?query=new+york>
4. Open the Edit Links dialog from the Web Info Tab
5. Click on the “Add” button and give your new link a name. This name will help you recognize

it among the list of URLs in your Web Info tab.

6. Open the advanced edit dialog from the link editor dialog.
7. Copy and paste the URL from your browser into the advanced edit dialog and delete the last few characters “new+York”.
8. From the list of the fields on the right of the dialog, click on “city” and click “OK”. Figure 26 will show what this dialog should look like.

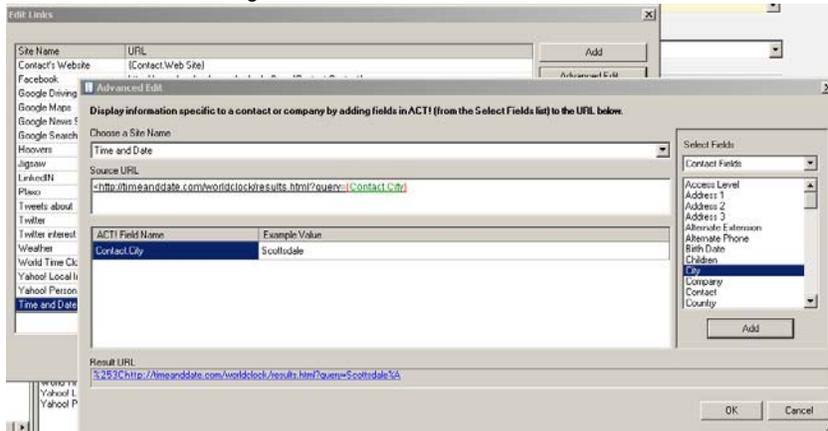


Figure 26 – Advanced Edit Dialog

If there is someone in your organization who is particularly good at constructing these links, you can email them to other users in your database so that others can simply copy and paste them into their Edit Links dialog. These links can also be constructed using custom fields in your database. So, for example, if you'd like to search Twitter™ for a specific hobby for each of your contacts, you can create a custom field called “Hobby” and then link a Twitter search URL to that custom field.

The Web Info tab will respect the same security as the main browser for your organization. So, for example, if Facebook is a URL that is blocked from employees in your organization, you will not be able to access it within ACT! either. Conversely, if your main browser has access a company intranet, you can also build links that will search for information on your company intranet and display in each Contact's tab.

Conclusion

Working “smarter not harder” achieves a lot more than just saving time. Increased efficiency means increased productivity. Leveraging ACT! integration with certain Microsoft applications not only ensures that users and managers can keep all the interactions with their prospects and customers in one place, but enables them to do it efficiently and effectively. Whether scheduling meetings and to-dos, generating letters and e-mails, attaching Web pages to a Contact Record, or analyzing opportunities, users can spend more time focusing on advancing their business and less time on administrative tasks⁹.

⁹ In ACT! Premium for Web, administrative functions must be performed on the Web server

Important Note: Review ACT! system requirements at www.act.com/2010systemreq. You must purchase one license of ACT! per user. Scalability varies based on hardware, size, and usage of your database. **Compatibility:** Due to new functionality available in ACT! 2010, we strongly recommend contacting your add-on product provider to confirm compatibility. Using versions of the add-on product that have not been confirmed compatible by the vendor may result in features behaving differently or not appearing within ACT! 2010. Visit www.actsolutions.com or contact your add-on product provider to help determine compatibility.

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About ACT!

ACT! by Sage is the #1 selling contact and customer manager in the world with 2.8 million users. It's designed so you can organize all the details of your customer relationships in one place for a complete view of the people you do business with. Improve your marketing effectiveness to attract new customers and get more from existing relationships. And, take action on your most qualified sales leads with total visibility and control of your pipeline. Because ACT! is easy to learn and use, you can be more productive right away. Continue working with your existing business solutions, like Microsoft Outlook, Word, Excel, and Lotus Notes, because they integrate with ACT!.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.