Chapter 5

A Few Good Tabs and Lists

In This Chapter

- Discovering the lists and tabs
- Customizing the lists and tabs
- Putting secondary contacts in the right place
- Linking documents to the Documents tab

Throughout this book, you find all the neat ways in which you can customize ACT!. In this chapter, you discover how to change the appearance of the various ACT! tabs and lists. And, although you encounter numerous tabs and lists in your travels through ACT!, you'll soon discover that you can modify them in exactly the same way.

After you've seen one list or tab, you've seen them all! And, if you're a fanACTic, the lists and tabs work pretty much like they did in previous versions.

Meeting the Lists and Tabs

The bad news is that numerous lists and tabs are sprinkled through ACT! and new users may find themselves lost in a maze of windows. The good news is that lists and tabs all have pretty much the same look and feel to them, so if you master one, you master them all!

You can find all lists by clicking View on the menu bar and then selecting a list that sounds fun and exciting. Two of the lists are so much fun that they are included in the Nav bar running along the left side of ACT!. And, if you feel so inclined, you're welcome to flip back to Chapter 3 to find out how to add all the list items to the Nav bar.

TIP

Minding your filters!

When viewing the various system tabs, you must be aware of the effect that the filters have on what information you see — or don't see. In ACT!, you can choose to filter out information or to include it. Different tabs have different filters; however, all tabs include a date filter and a user filter. If the filter is set to show only items in the future, and you have an activity scheduled for today, you don't see today's activity. And, if you schedule an activity, but you set the filter to include only Alyssa's activities, you don't see your activity either.

When frustrated, check your filters! You might be puzzled at the fact that information you just *know* has been entered into the database has mysteriously disappeared. This becomes increasingly important on the Activities tab, which contains several options (including three buried away behind the Option button). The Task and Opportunity lists can be even more confusing; these lists contain a variety of options — all of which can be hidden away with one click of the Hide Filters button.

Here's a list of the lists you work with most often:

- **Contact:** Lists all your contacts; the list is filtered based on your current lookup.
- **Task:** Lists all the tasks and activities you scheduled for all your contacts; you can filter these by date, type, priority, user, public versus private, timeless, cleared status, and Outlook relationship.
- **Group:** Lists all groups and can optionally include subgroups.
- **Company:** Lists all companies and can optionally include divisions.
- **Opportunities:** Lists all the sales opportunities that you enter for all your contacts; you can filter opportunities by date, status, process, stage, probability, amount, and public versus private.

There are two types of tabs: *system* tabs, which are the same for any and all layouts you use; and *user* tabs, which you can rename and modify to best fit the way you work (see Chapter 16). The system tabs you use most often with ACT! are

- **Notes:** Lists all notes you record for the current contact, company, or group; you can filter the notes by date, private versus public, and user. See Chapter 8 for more on the Notes tab.
- **History:** Lists all correspondence, activities, and document information that was recorded automatically by ACT! for a contact, group, or company; you can filter the histories by date, private versus public, type of history, and user. Chapter 8 covers the History tab.

- **Activities:** Lists all activities for the contact, group, or company; you can filter the activities by date, private versus public, cleared, timeless, type of activity, priority, and user. I go in depth about the Activities tab in Chapter 9.
- **Opportunities:** Lists the financial lowdown on all the selling opportunities for the current contact, group, or company; you can filter the opportunities by date, status, private versus public, and user. Chapter 20 covers the Opportunities tab.
- **Documents:** Lists all files attached to the current contact, group, or company; you can't filter this tab. See the section, "Documenting Your Documents," later in this chapter for more about the Documents tab.
- **Secondary Contacts:** Lists the secondary contacts, for example, the butcher, the baker, and the candlestick maker, that are directly associated with the current contact; you can't filter this tab. Flip ahead a few pages to the "Corralling Your Secondary Contacts" section in this chapter where I discuss the Secondary Contacts tab.
- **Groups/Companies:** This tab has a dual-personality. You'll notice the addition of the Show Membership For drop-down list that lets you indicate whether you want to view the groups or the companies that the contact is associated with. This tab only appears in the Contact Detail window.
- **Contacts:** Lists all the contacts associated with the current group or company. You only see this tab in the Group Detail window or the Company Detail window.

You'll notice that the first five tabs appear on the Contacts, Groups, and Companies windows. That's because you can add a note, an activity, and so on to either an individual contact record, or to a company or group record.

Remodeling lists and tabs

One of the reasons that you might find the lists and tabs to be so useful is the ease in which you can customize them. You can change the order of the columns, widen the columns, add or remove columns, and then print out your final product. In this section, I cover a few ways in which you can change the look of your lists and tabs.

Adding or removing columns

Probably the first thing that you want to do to modify your lists and columns is to add or remove an additional column — or two or three! Follow these steps:

1. **Click the Options button (in the top-right corner) on any list or tab and choose Customize Columns from the menu that appears.**

   The Customize Columns dialog box appears (see Figure 5-1).

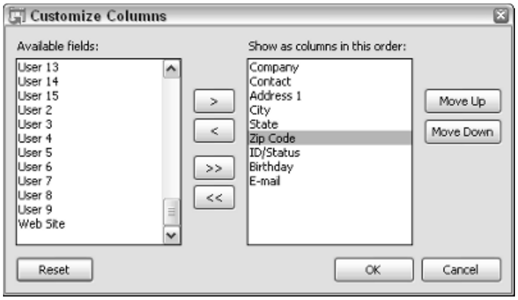

Figure 5-1: Adding columns to the Contact List.

2. **Select the field (column) that you want to add by clicking the appropriate choice in the Available Fields list.**

   Depending on the list or tab you're working with, you see various field choices. Feel free to include as many — or as few as your little heart desires.

3. **Click the single right-pointing arrow.**

   If you're really into seeing a lot of information, you can click the double right-pointing arrows; that adds all available fields to your list or tab.

4. **To remove an item, click the appropriate choice from the Show as Columns in This Order and then click the single left-pointing arrow.**

   If you really want to get rowdy, click the double left-pointing arrows to remove all the current fields. You might do this if you have an overwhelming desire to start from scratch.

5. **Click the Close button when you're done.**

Changing the order and width of columns

You can also change the order of the fields from the Customize Columns dialog box. Click the appropriate choice from the Show as Columns in This Order and click the Move Up or Move Down buttons.

The order that the items appear in the Customize Columns dialog box is exactly the way they appear in your final product. Knock yourself out, arrange and rearrange all you want, and sleep peacefully knowing that if you don't like the outcome you can always change it again. Now, if I could just do that with my living room!

You can also drag-and-drop the various column headings to change the order in which columns appear on the lists and tabs. For example, if you want the Date field to appear before the Time field, simply click the Time column heading and drag the heading over to the left of the Date column heading.

Changing the width of a column is almost as easy. If you move your mouse on the line between any two column headings, your cursor transforms into a double-headed arrow. When that arrow appears, hold down your left mouse button and drag to the left or right to narrow or widen a column. The column to the left of your mouse changes width.

Sorting your lists and tabs

In general I hate terms like "automatic" and "click of a button" because your vision of "automatic" might be quite different from that of a software engineer. That said, sorting the entries in any of your lists and tabs is, well, automatic and can be done with the click of a button: Just click the column heading that you want to use to sort the list. Want the contacts in your Contact list to be sorted alphabetically by city? Click the City column heading. Change your mind and want it sorted by zip code instead? Click the Zip Code column heading.

When you click a column heading, an up arrow appears indicating that the contacts are sorted in ascending order (in alphabetical, A-to-Z, or 1–10 order). To reverse the sort order, click the column heading again. If the list is sorted in ascending order, contacts that have no information in the selected column appear first in the list. In descending order, they appear last in the list.

Sorting your contacts is so simple that you may decide to get really adventurous and sort based on another criterion. Go ahead — I dare you! Click any column heading to re-sort the list by the field of your choice.

REMEMBER

ACT! automatically separates the contact's name into a first and a last name. When you click the Contact column heading in any of the lists or tabs, you'll notice that your information is sorted by last name so that Lindsay Garrison appears alphabetically with the Gs rather than with the Ls.

Corralling Your Secondary Contacts

Does this scenario sound familiar? You have a main contact, but of course that person, being the big cheese, is rarely available so you often have to work with his assistant. But of course the assistant can't do any true decision making, so you might need to speak to Mr. Big's sales manager on occasion. And, when the sales manager goes on vacation, you need to call the assistant sales manager. Yikes! The Secondary Contacts tab, shown in Figure 5-2, allows you to store all the pertinent information about Mr. Big and his partners in crime in the same area so you don't have to go on a wild goose chase hunting down names, telephone numbers, and e-mail addresses. And, just like promotions that often happen, you can "promote" a secondary contact into a main contact.

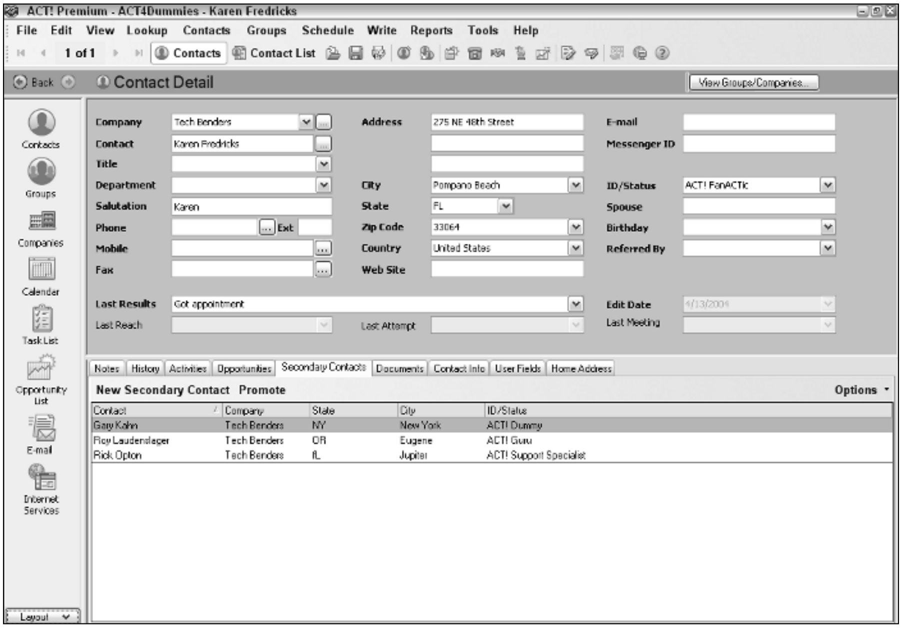

Figure 5-2: The Secondary Contact tab.

TIP

Not sure whether to add a contact as a primary or a secondary contact? You might want to think of how you are going to use the secondary contact. If you just want to be able to access an assistant's phone number, then the assistant is a good candidate for entry as a secondary contact. However, if you want to be able to e-mail your monthly newsletter to the assistant or include her in some of your mail merges, you need to add the assistant as a primary contact record instead.

Adding a secondary contact

Of course, you can't add a secondary contact until you create a main contact (see Chapter 4 to do so). After you create the head honcho's contact record, here's what you do to create the secondary contact record(s):

1. **From the Contact Detail window, click the Secondary Contacts tab.**
2. **Click the New Secondary Contact button on the top of the Secondary Contact tab.**

   The Secondary Contact dialog box appears (see Figure 5-3).
3. **Fill in all the juicy details for the secondary contact.**

   Although you don't fill in quite as much information as you can for a main contact, you do have all the really pertinent fields. Don't forget to click the Business Address tab for even more fields.

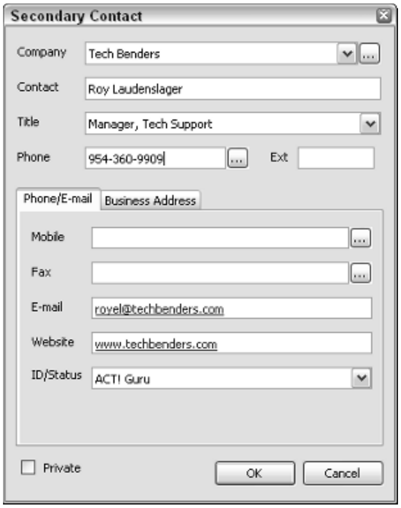

Figure 5-3: Filling in the secondary contact information.

4. **Click OK to create the secondary contact.**

Congratulations! Your main contact has now given birth to a secondary contact. All the secondary contacts that you create appear on the Secondary Contacts tab of the primary contact.

If you need to go back and edit or add information for the secondary contact, just double click the name from the Secondary Contact list and *voilà,* you're back to the Secondary Contact dialog box.

Deleting a secondary contact

Sorry to say, but some of the secondary contacts may drift off into the sunset, leaving you with the need to remove them from your database. Not to worry; you can delete a secondary contact by following the bouncing ball through these steps:

1. **Click the Secondary Contacts tab from the Contact Detail window.**
2. **Right-click the contact you want to delete and choose Delete.**

   You can never say that ACT! doesn't give you ample warning before deleting a contact. As usual, when you attempt to delete even a secondary contact ACT! shows you the scary warning seen in Figure 5-4.
3. **Click Yes to delete the selected secondary contact.**

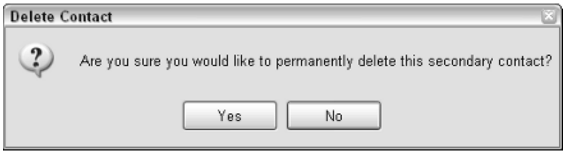

Figure 5-4: The scary warning you get when deleting a secondary contact.

Promoting a secondary contact

Promoting, promotion — it has a lovely ring to it, don't you think? That lowly assistant might be promoted through the ranks and some day become the "big guy" — or at the very least a more important contact than he/she is today. If you're worried that you have to reenter all that basic information in again, don't be. Just promote the contact by following these steps:

1. **Click the Secondary Contacts tab in the Contact Detail window.**
2. **Select the secondary contact that you want to promote.**
3. **Right-click and choose Promote from the menu.**

   The Promote Secondary Contact dialog box appears, as shown in Figure 5-5.
4. **Select whether to duplicate the main contact's primary fields.**

   With promotions come responsibilities and decisions. If the secondary contact is sliding into the role of the current primary contact, you want to copy all that information to the record of the newly promoted contact. If, however, the secondary contact doesn't have the same basic information as the primary contact, you can choose not to copy the primary fields.
5. **Click OK.**

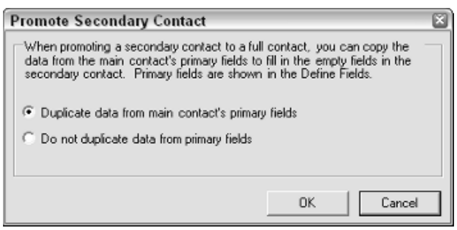

Figure 5-5: Promoting a secondary contact.

Documenting Your Documents

No matter how organized you think your documents might be, you probably occasionally misplace one of them. Of course you can always have Windows search for it, but ACT! offers an easier — and faster solution. The Documents tab, which you can find on the Contacts, Groups, or Companies windows, allows you to attach any and all of your files related to the current contact, group, or company. You can add a proposal created in Excel, a contract created in Word, or even a PDF file that you scanned into your computer. By adding them to the Documents tab, which is shown in Figure 5-6, you are actually creating a shortcut to the document.

After you add a document to the Documents tab, you can open the file directly from ACT! to view, edit, or print. Or, if you prefer, you can still fish through your computer and open the document in your word processor as you're already used to doing. You can also link the same document to multiple records. Removing a file from the Documents tab does not remove it from your computer.

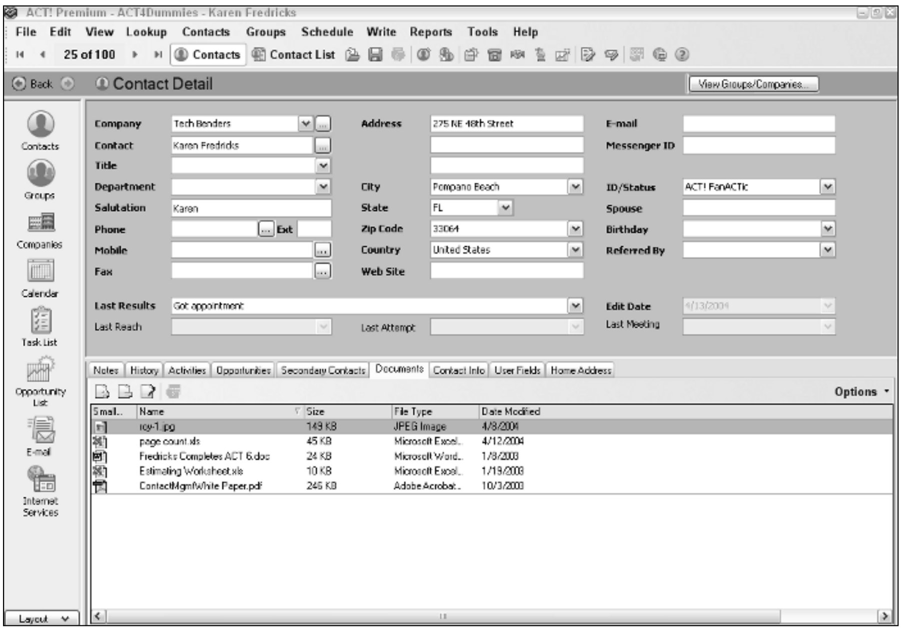

Figure 5-6: The ACT! Documents tab.

Adding a document

Adding a file to the Documents tab is very easy, and considering the time you save down the road, well worth the effort. Just follow these steps:

1. **Display the contact, group, or company record to which you want to add a document.**
2. **Click the Documents tab.**
3. **Click the Add Document button on the Documents tab icon bar.**

   Alternatively, you can right-click in the file list area, and then choose Add Document from the menu.

   The Attach File dialog box opens.
4. **Browse to the document you want to add, select it, and then click Open.**

   ACT! adds the document to your ACT! database, creates a shortcut to the document, and displays the filename, size, type, and last modified date on the Documents tab. Because the document is now part of your database, remote synchronization users can now access the document as well.

TIP

You can drag and drop a file to the Documents tab from Windows Explorer or My Computer by dragging the document's icon to the Documents tab.

Opening a document

The true benefit of adding documents to the Documents tab is the speed in which you can open the documents that pertain to a specific contact, group, or company. Follow these steps:

1. **Click the Documents tab.**
2. **Select the document you want to open.**
3. **Click the Edit Document button on the Documents tab icon bar. Alternatively, you can right-click in the file list area and choose Edit Document from the menu.**

   Magically, the program associated with the document opens, revealing the document. You're on you own here — just remember that you can now edit, save, or print the document as you normally do. Any changes you make are reflected the next time you open the document again either through ACT! or the original program.

Removing a document

After you add a file to the Documents tab, you might change your mind and decide to make it go am-scray. Easy come, easy go. Follow these steps to rid yourself of the offending document:

1. **Display the contact, group, or company record that contains the document you want to eliminate.**
2. **Click the Documents tab.**
3. **In the Document List, select the document you want to remove.**

   You might have saved the same document to more than one contact record. Removing the association between a document and one contact record does not affect the link between that file and the other contact record. The document is still contained inside the database.
4. **Click the Remove Document button on the Documents tab icon bar.**

   Alternatively, you can right-click in the file list area, and choose Remove Document from the menu.

   ACT makes sure you want to remove the document by presenting a warning. Software programs very often present you with scary messages before deleting important information. This is a good thing. Heed the warnings!

   ACT! removes the link between the document and the current record. It also removes the document from within the database. And, because the document doesn't end up in the Recycle Bin, think very carefully *before* deleting the document.
5. **Click Yes to confirm that you really, truly want to remove the document.**

If you originally created the document somewhere in your computer, the document is still there. However, if you are a sync user who received the document as part of the synchronization process, you might want to first open the document and save it to your computer before removing it from the Documents tab — otherwise it's gone for good.