

# Chapter 1

## An Overview of ACT!

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### *In This Chapter*

- ▶ The history of ACT!
  - ▶ What is ACT!?
  - ▶ Who uses ACT!?
  - ▶ Basic ACT! concepts
  - ▶ A few ground rules
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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! 6.0

- ✔ Is a Customer Relationship Management (CRM) Software Package
- ✔ Provides users and organizations with powerful tools to manage their business relationships
- ✔ Is a packaged software product that can be customized based on your company's requirements
- ✔ Is the world's leading CRM software

Feel free to use these points to impress your friends. If, after telling all this to your friends and they look at you rather blankly, at least you know that your knowledge of computing is equal to — if not greater than — theirs. At that point, you might want to list 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. Finally, I end the chapter with a few ground rules that I've established over the years. I've watched new users wrestle with certain aspects of using ACT!, and I want to save you the trouble.

## And then there was ACT!

Once upon a time, before the advent of the personal computer, busy people everywhere were forced to rely on such archaic tools as Day Timers and yellow sticky notes to keep themselves organized. You could easily spot busy people; they could be identified by the various bits of paper that trailed after them when they rushed frantically from appointment to appointment. You would also notice that these busy people were generally late to their appointments. You would often see busy people crying and/or mumbling to themselves. Busy people, you see, often scheduled conflicting appointments because they had failed to compare the schedule hanging on the refrigerator at home

with the one that they carried in their somewhat disorganized briefcase. Divorce rates were high because busy people missed anniversaries and soccer games!

Pat Sullivan was a busy person. Sullivan, a salesman, came to the conclusion that it was actually more fun to play than it was to work. And, if he could organize his work life, he'd have more time for his personal one. He began to manually track his prospects, customers, and all the related data. Then, in 1985, Pat Sullivan created the first electronic contact manager: ACT!. What began as a side project quickly blossomed into a full-fledged business with over 3.2 million users.

## What Does ACT! Do?

Using ACT! allows me to have more free time — which means that I have more playtime. 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've included 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 70 predefined fields for each contact that you add to your database. If you want to add new ones to meet your specific needs, go right ahead. (Chapter 14)
- ✔ 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 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 have had — or will have — with that contact. In addition, you can set an alarm to remind you of the important stuff, and roll over the less important things until the next day. (Chapter 8)
- ✔ Prints out anything from simple phone lists, address books, or labels to detailed reports on activities, notes, leads, and sales opportunities. You can print reports of your reports if you feel so inclined. (Chapters 9, 10, and 11)
- ✔ Enables you to attach a Web page to any contact that can be referenced again later, even if the Web page has been changed or removed from the Internet. (Chapter 18)
- ✔ Creates mailing labels and envelopes. Or, if you prefer, perform broadcast faxes and e-mails with ACT!. (Chapters 9 and 12)
- ✔ Manages your sales pipeline with built-in forecasting tools. If you're so inclined, print a few sales reports — or create a graph showing your open, won, or lost sales. (Chapter 19)
- ✔ Synchronizes with virtually any handheld device so that you can enter — or view — information from either your personal digital assistant (PDA) or from ACT!. (Chapter 24)
- ✔ Integrates with QuickBooks and other accounting software to avoid double entry between your accounting and database software programs. (Chapter 24)

## The Typical ACT! User

So just who is the typical ACT! user? Well, with more than 3.2 million users and 11,000 businesses currently using ACT!, you are safe to assume that nearly every industry is represented among its user base. Although ACT! started as primarily 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!.

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So just who is using ACT!? Everyone.

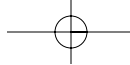
- ✔ The CEO uses ACT! because he wants to know what his salespeople are doing and how his customers are being treated.
- ✔ The administrative assistant is using it to automate routine tasks and to keep a schedule of various tasks and activities.
- ✔ A salesperson is using ACT! to make sure that she's following up on all her prospects.
- ✔ The disorganized person finds that using ACT! will help him to become more organized.
- ✔ The smart person uses ACT! because she knows that she'll have more time to play by working more efficiently.
- ✔ The 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 their employees
- ✔ Small businesses that have to rely on a small staff to complete a multitude of tasks
- ✔ Businesses of all sizes that are looking for software that will automate their businesses and make them more productive in less time

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
- ✔ People who don't use even a paper address book to keep track of their contacts
- ✔ 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



## Terms You Need to Know

Nobody likes technical jargon, but while I show you how to use ACT!, I'll be using a handful of somewhat technical terms; it just can't be avoided. It might be less painful in the long run to just become familiar with them now.

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. You might want to 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*.

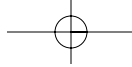
A *field* is a single piece of information. In databases, fields are the smallest units of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. In ACT!, you start with 70 separate fields for each individual contact. You'll find out more than you ever wanted to know about fields in Chapter 4. In Chapter 14, I show you how to change the attributes of these fields and how to add new ones if you're the database administrator.

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*.

A *file* is the entire collection of data or information. Each database that you create in ACT! will be given a unique filename; creating more than one file or database in ACT! is possible — 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 Do's and Don'ts based on a few of the mistakes that I've seen 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. But 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.



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### **Karen's Three Rules of Never:**

- ✓ Never use the drop-down arrow next to the Company field to try to find another contact.
- ✓ Never change a field or drop-down list without first consulting mutual users of your database.
- ✓ Never change your synchronization settings if your database is set to synchronize with another database.

### **Karen's Three Rules of Always:**

- ✓ Always log in to ACT! as yourself.
- ✓ Always strive for standardization in your database.
- ✓ Always compress and reindex and perform a backup of your database at least once a week!

