

ACT! 6.0

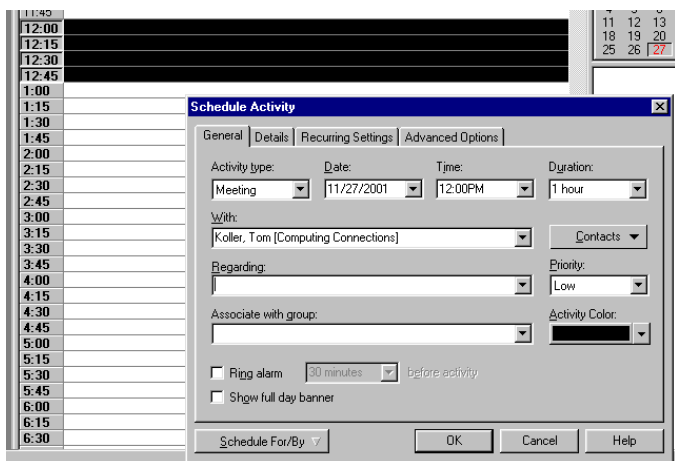
Scheduling Tips

Schedule from The Calendar – ACT! gives you the option of scheduling activities from the **Contact Record, Task List or Calendar**. We recommend scheduling activities from the **Calendar** for two reasons. First, users can view other activities scheduled for the day, week, etc. Second, fields in the **Activity Dialog Box** are automatically filled in. You will not have to adjust the date, time and duration fields.

Suggested Steps

1. Use the **ACT! Lookup** menu to activate the desired contact.
2. Click the **Daily or Weekly Calendar Icon** located in the **ACT! View Bar**. Scroll to the date the activity is planned.
3. Drag your mouse pointer over the desired time interval. When you release the mouse the Activity Type, Date, Time, Duration and “With” fields are automatically completed. **Figure 1** shows an activated dialog box.

Figure 1



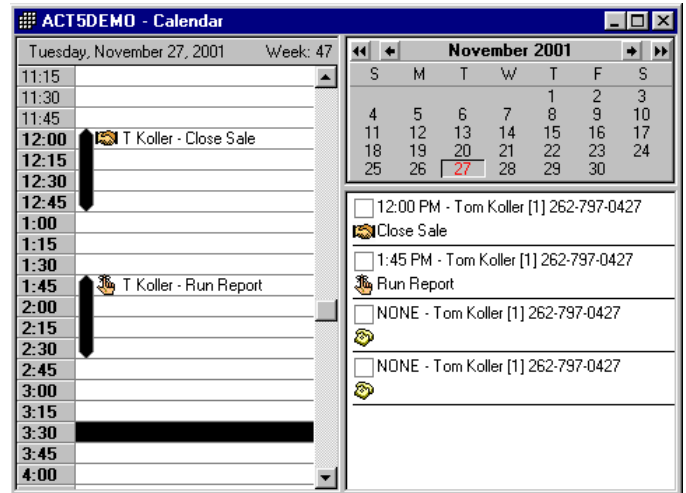
4. Enter information in the **Regarding List Box**. Populate additional fields as desired. To enter more information, click the **Details TAB**.
5. Click OK. The activity is scheduled.

Completing Activities from the Calendar – As with the scheduling process, ACT! allows users to complete activities from the **Contact Record, Task List or Calendar**. Again, we believe the **Calendar** is the best option. It is important to remember that follow up activities should be scheduled at the same time the current activity is completed. Every sales event requires a follow-up.

Suggested Steps

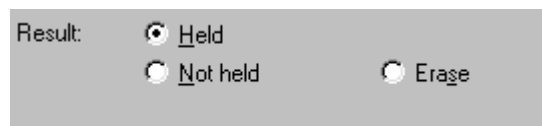
1. Activate the **Daily or Weekly Calendar**. We prefer the **Daily Calendar**. Note the organization of planned activities. Activities scheduled to occur at a specific time are listed on the left section of the window. All activities, including timeless activities, are located on the right section of the Window. See **Figure 2**.

Figure 2



2. To complete an activity, click inside the activity check box on the right side of the window. This action will activate the **Clear Activity Dialog Box**.
3. Check the **Add Details to History Box**. Enter notes reflecting the outcome of the activity.
4. Click the **Follow Up Activity... Button**. The **Schedule Activity Dialog Box** is activated. Enter the desired information.
5. Click OK. You are returned to the **Complete Activity Dialog Box**.
6. Mark the activity as **Held, Not Held or Erase**. See **Figure 3**.

Figure 3



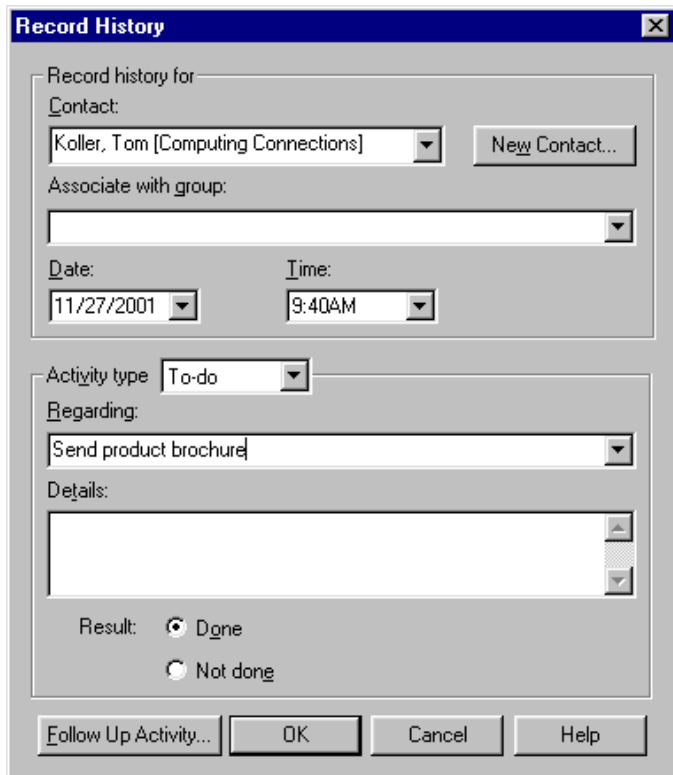
7. Click OK. You have completed an activity and scheduled a follow up action!

Recording Unplanned Calls – An unplanned call is an event that is not scheduled in ACT!. Customers and prospects will call to request information, change meeting dates and order products/services. It is important to record this information in the **Notes/History TAB**.

Suggested Steps

1. Look up the contact initiating the activity.
2. Use the **Ctrl+H** keyboard shortcut to activate the **Record History Dialog Box**. See **Figure 4**.

Figure 4



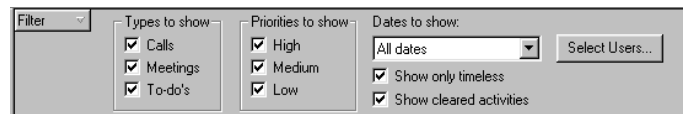
3. Enter the desired information in the **Regarding** and **Details Fields**.
4. Click the **Follow Up Activity... Button**. Complete the **Schedule Activity Dialog Box**, then Click OK. This action returns you to the **Record History Dialog Box**.
5. Click OK to save the history record.

View and Analyze Activities with the Task List – The **Task List** is the best place to view all scheduled activities at a glance. Use **Task List** filters to view all activities scheduled for a specific time period or user. We have found that sales managers use the **Task List** to view planned activities for their sales staff.

Suggested Steps

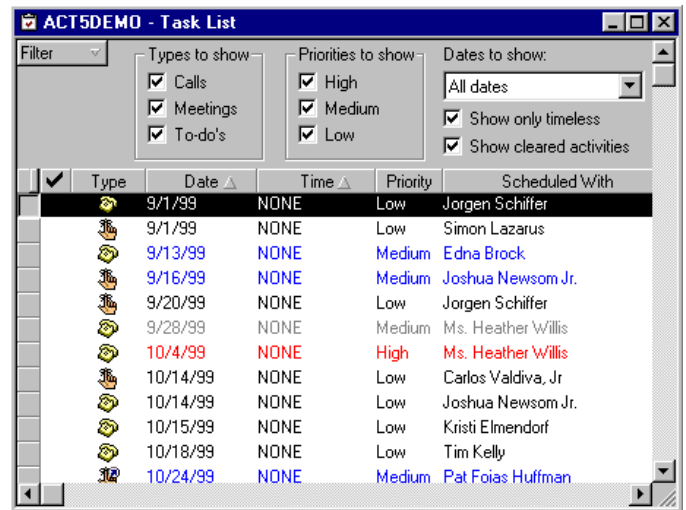
1. Click **Task List** from the **ACT! View Bar**.
2. View the filtering options. Note that you can filter by activity type, priority, dates and user. See **Figure 5**.

Figure 5



3. Sort the **Task List** table by clicking on column-headings. For example, clicking the **Date Column-heading** sorts the scheduled activities in chronological order. See **Figure 6**.

Figure 6



To get help with ACT! or other office software contact Computing Connections, Inc. at:

Phone: 262-797-0427
 Fax: 262-797-9920
 Email: info@computingconnections.com
 Web Site: www.computingconnections.com