

Boost your success with the right-sized ACT! interface

Applications: ACT! Classic/2006/2007



AT A GLANCE

ACT!'s default color scheme and fonts do nothing to help you visually identify your location in ACT!, and they make it difficult to read on smaller screens. With our guide to a few commonly ignored Preferences, you can easily customize colors and fonts so you can navigate ACT! like a pro.

To maximize productivity and minimize eye strain with color and size, we'll:

- Examine the best ways to customize size and color so you know the right changes to make.
- Change font styles and sizes to make reading easier.
- Enhance productivity with contrasting color schemes.

You live in ACT! to grow your business and make more contacts. But after hours in front of your computer, your eyes glaze over as you struggle to see the small text or quickly locate information your caller wants. If you have a smaller monitor or your eyes just don't work like they used to, your ability to locate information and read it accurately can suffer even more. Fortunately, you can easily customize the text and backgrounds in ACT! to streamline your work efforts and lighten your eyes' workload.

Customize your experience

In ACT!, you can choose your own Preferences set to make ACT! more user-friendly and customized for how you work. The number of changes you can make varies by version. Also, some preference changes require you have Administrator rights in

ACT!, while you can make others even if you're a Standard user.

Important: If you're a Standard user, you can make all the changes we examine here.

Color your world

Not only can the right color make it easier to maneuver in ACT!, but color can change your mood, too. Psychiatrists who have studied color offer these observations:

- **Blue.** Slows breathing and pulse rates.
- **Green.** Connotes freshness and growth and stimulates interaction.
- **White.** Offers a sense of space and denotes cleanliness and authority.
- **Red.** Warns, cautions, and excites, but also connotes financial failure.

Maximize the effect with a good color strategy

In all of design, colors and sizes serve two primary purposes: aesthetics and usability. You may want to change colors in ACT! just to make them more pleasing to your eye. Or, you may change font styles, sizes, and colors as well as background colors to increase your productivity. If you can better locate and read contact information with a different color and font scheme, your productivity will certainly rise.

Hint: Before you begin making changes, plan ahead for the types of changes you want to make to minimize experimentation.

Quickly identify tabs by color

If you're like most busy professionals and business owners, you multitask. As you talk to a prospect, you jump from reviewing

person's phone number in your calendar to the Contact view's History tab to detail the conversation. You can make it easier to visually identify the tabs if you select a different background color for each.

Consider contrast

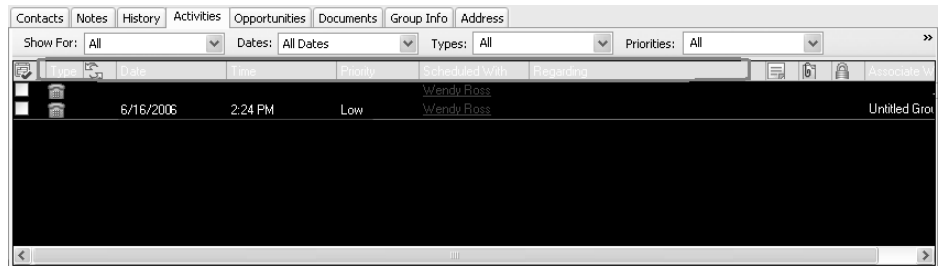
If you've designed your own website, software interface, or PowerPoint presentation, you probably know that contrasting text and background colors make on-screen visuals easier to read. This becomes especially important for the visually impaired.

ACT! reacts well when you choose dark text on light backgrounds. Unfortunately, because it doesn't change all text on a tab or list view the same way, you may not want to change to light text on a dark background. For example, let's say you choose a light yellow for the text color and black for the background color for the Activities tab. These colors contrast well in a presentation or website, but don't translate well in ACT!

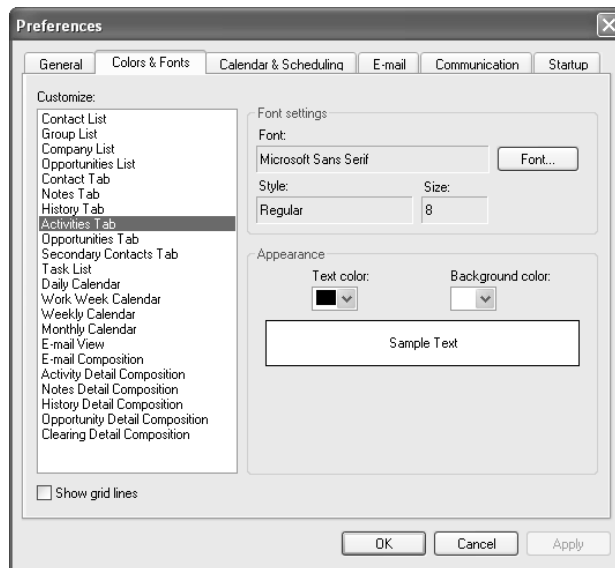
As shown in **Figure 1**, the yellow text and black background cause problems in the tab, starting with the column headers circled in the figure. Because you can't change the column header background with Preferences, it's hard to read the yellow text. Additionally, notice that you struggle to read the contact name's hyperlink, and that for the first activity, you can't read the scheduled call's details. (For the second call, we changed the text color within the Schedule Call dialog box so that we could read it.)

Implement changes

You'll find the Preferences dialog box in ACT!'s SQL versions (2005/2006/2007) quite different than that for ACT! Classic users. The dialog box offers fewer tabs but more options within the Colors & Fonts tab due to the SQL version's additional tabs and views. As shown in **Figure 2**, despite additional objects to customize, the Colors & Fonts tabs remain identical between the two versions.

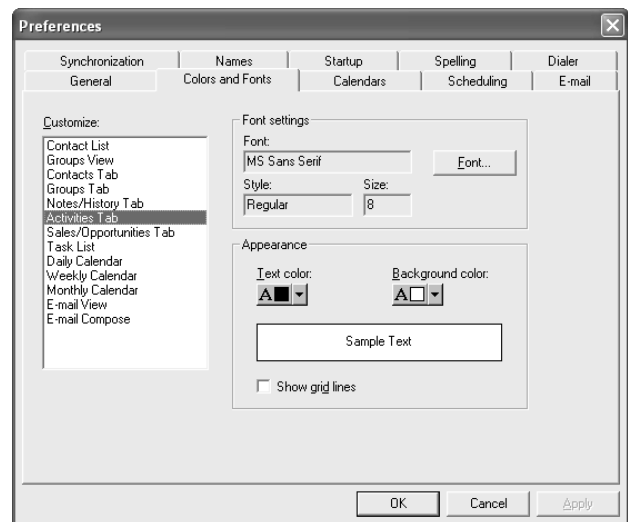


1: Dark backgrounds and light text work well sometimes, but the light colored column headers become nearly invisible.



2006/2007

Classic



2: Use the Preference dialog box's Colors & Fonts tab to make quick changes to streamline your work.

To select a preference to edit:

1. Select Tools | Preferences. (In Classic, select Edit | Preferences.)
2. Click on the Colors & Fonts tab.
3. In the Customize list box, select the item you want to edit. We chose the Activities Tab, as shown in **Figure 2**.

To customize a selection:

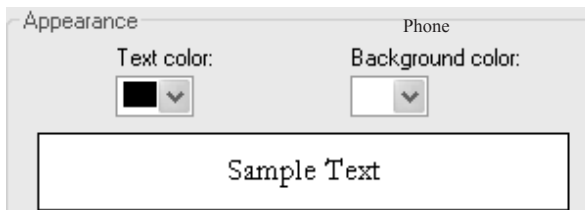
1. In the Font Settings section, review the current settings in case you want to revert back to them later.
2. To change the font, click the Font button to open the Font dialog box.

3. Make your selections for Font, Font Style and Size and click OK (we chose Garamond, Regular and 12). As you can see in **Figure 3**, the Sample Text shown in the tab's Appearance section updates.
4. To change the colors for your selection, select your desired colors from the Text Color and Background Color dropdown lists, as shown in **Figure 4**.
5. If you want to make changes to multiple selections at once, click Apply, and then repeat steps 1 through 4. When finished, click OK to apply and close the dialog box.

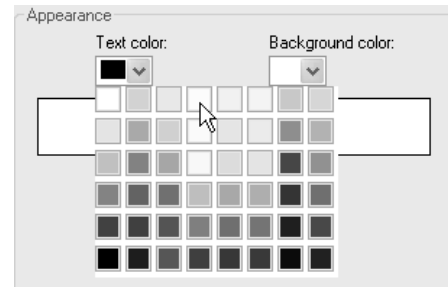
Check your work

As you saw earlier, some color and font changes sound great in theory, but in practice they just don't work well. Before you move on to other tasks, check your changes to ACT! to ensure they work well for you.

To check your work, select the various tabs and lists and review the changes. Look carefully at how the changes affect the tab, including the text you enter and the column headers. Also consider where font changes make it necessary for you to scroll to view an entire tab, and determine if the extra effort is worth the payoff.



3: As compared to **Figure 2**, the Sample Text in the Appearance section updates to demonstrate your selections.



4: Click on the dropdown list to open a color palette from which you choose your desired color.