

ACT! like a pro with immediate access to your contacts in Contact List view

Application: ACT! Classic/2006



AT A GLANCE

With the basic understanding of Contact List view that we brought you last month, you can more quickly locate the contacts you need without all the extra clicking. But if you want to identify your contacts by fields that Contact List view doesn't show, it isn't much help. Don't give up on the view yet — customize it to display the columns you need.

To continue our quest to maximize success with Contact List view, we'll:

- Add the columns to Contact List view that you need to quickly identify the right contact in a lookup.
- Rearrange columns to put your most important values front and center.
- Clean up your view so you don't replace a lot of clicking through Contact view with a lot of scrolling.

Last month we introduced you to Contact List view and how you can use it to streamline your searches. This month we take you to the next level of efficiency by demonstrating how you can customize your Contact List view by adding columns to the view, such as email address. **Bonus:** You can use the techniques here to customize other views and tabs within Contact view. So even if you aren't ready to switch to Contact List view, there's something here for you after all.

Customize your view

Now that you see the benefits of Contact List view and have started to use it, you may find that the default columns and their order don't meet your needs. Make the view more efficient by adding, deleting, and/or rearranging the columns for the way you work. Because the steps for customizing Contact List view in ACT! Classic and ACT! 2006 versions are so different, we'll examine them separately.

Worry-free customizations: Changes to the columns in Contact List view are user-specific, so you don't need to worry about affecting other users. As a safeguard, when you delete columns, you delete them only from your view, not from your database.

Add and arrange 2006 Contact List view columns

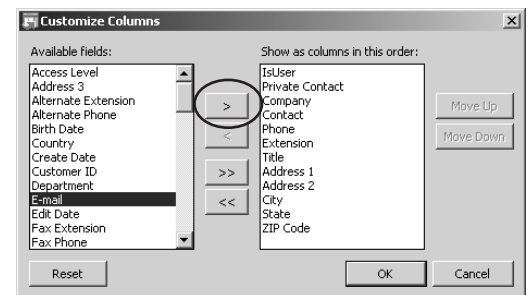
In 2006, you'll make changes to displayed columns using a dialog box.

To add columns to your Contact List view in 2006:

1. Perform a lookup from Contact view.
2. Click the Contact List button on the toolbar to switch to Contact List view.
3. Click the Options button in the upper-right corner of the Contact List view. Select Customize

Columns from the resulting pop-up menu.

4. In the resulting Customize Columns dialog box, select the column you want to add from the Available Fields list box as shown in **Figure 1**. We selected E-mail.
5. Click the single right arrow circled in **Figure 1**. The column name disappears from the Available Fields list box and appears at the bottom of the Show As columns In This Order list box.
6. Repeat for more columns, if desired.

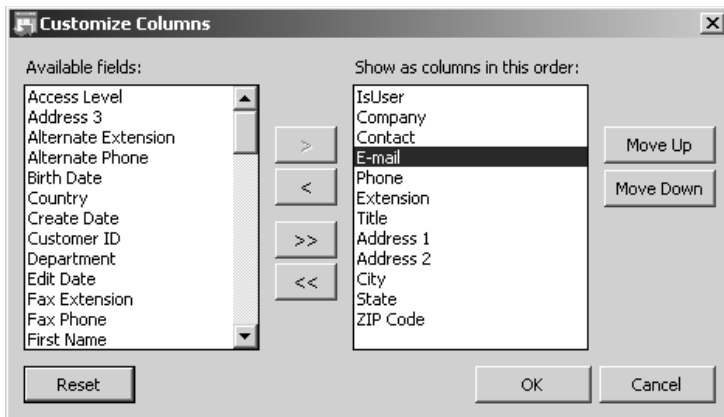


1: Add available fields to your display by clicking on the appropriate arrows.

If you're happy with the current column order, click OK to add the columns and close the Customize Columns dialog box. It isn't likely, however, that you want your new columns simply added at the end (all the way to the right). Fortunately, you can rearrange the columns.

To rearrange columns in your Contact List view in 2006:

1. In the Show As Columns In This Order list box, select a newly added column name and click the Move Up button repeatedly until the column is in the desired position. As shown in **Figure 2**, we used the Move Up button to move the E-mail field to just below the Contact field in the list box.
2. To move any other column, select its name in the Show As list box and use the Move Up or Move Down button to rearrange.
3. Click OK when complete.



2: Move a new field to the desired position by highlighting it and clicking the Move Up button.

Company	Contact	E-mail	Phone	Extension	Title	Add
Bob James Equipment	Bob James	bjames@bjc.com	(955) 555-5555		Owner	221
Boomers Antwox	Jane Bellany		0138 167423		Owner	Mile
Boomers Antwox	Richard Harvison		0131 268960		Vice President	No
Boomer's Antwox	Emily Dunn		(602) 555-4874		Sales Representativ	698
Boomer's Antwox	Bette James				Sales Representativ	698
Branden's Bakery	Liz Dittmeier		(208) 555-2445		Manager	411
Branden's Bakery	Mackenzie Jensen		(208) 555-2211		Owner	411
Brock, Lathers and Freedman	Dr. Dieter Brock	dbrock@cpqt.co.uk	(879) 9 2-343		Plastic Surgeon	FLC
Bushy's Golfers World	Paul Brushman	ginger@mevfamily.net	(455) 555-2221		Chief Golf Sales Mar	Lev
Cadbury	William Cadbury		0121 451 4444		Founder	Cod
Captains of Industry	IM Powerful	in@captainsof.com	(713) 661 5295		President	PO
CH Gourmet Coffee	Cecil Carter	Cecil@chgourmetgifts.com	(212) 555-4444		Public Relations Mgr	138
CH Gourmet Gifts	Erni Anderson	Erni@chgourmetgifts.com	(415) 555-2331		Vice President of US	138
CH Gourmet Gifts	Betty Browser	bbrowser@chgourmet.com	0366462200		Sales Representativ	109
CH Gourmet Gifts	Fred Fendeline	fendeline@chgourmetgifts.com	0208 748534		Sales Representativ	506
CH Gourmet Gifts	Chris Hillman	Chris@chgourmetgifts.com	0121 6558 1728		CEO	138
CH Gourmet Gifts	Allison Mikala	Allison@chgourmetgifts.com	(212) 555-9421		Sales Representativ	138
CH Gourmet Gifts	Melissa Pearce	Melissa@chgourmetgifts.com	(212) 555-8431		Assistant	138
CH Gourmet Gifts	Juliette Rosseau	Juliette@chgourmetgifts.com	(212) 555-7321		CFD	138
CH Gourmet Gifts	Jonathan Sommer	Jonathan@chgourmetgifts.com	03 664 62200		Vice President Assis	109
CH Gourmet Gifts	Sarah Whiting	Sarah@chgourmetgifts.com	642 2222343		Vice President Euroq	506
CH Gourmet Imports	Jane Chan	Jane@chgourmetgifts.com	(212) 555-4447		Business Developm	138

3: Our newly added E-mail column displays right where we want it in the spreadsheet style view.

ACT! adds the new columns to the Contact List view in the order you designated, as shown in **Figure 3**.

Add and arrange Classic Contact List view columns

In Classic, you'll take a drag and drop approach to adding and arranging columns.

To add columns to your Contact List view in Classic:

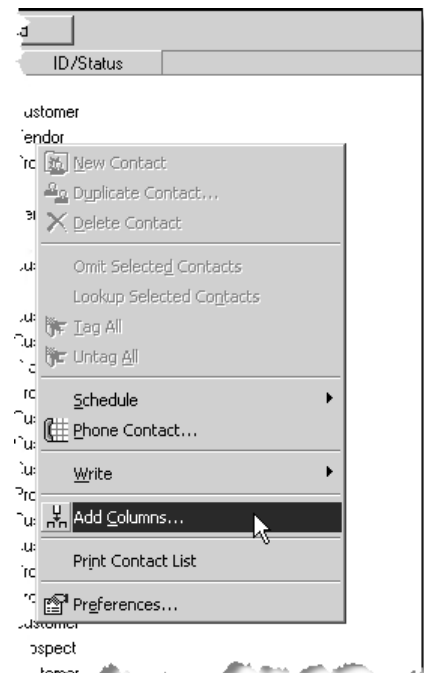
1. Perform a lookup from Contact view.
2. Click the Contact List button on the navigation bar on the left to switch to Contact List view.
3. Use the bottom scroll bar to scroll to the right until you can see blank space.

4. As we show in **Figure 4**, right-click anywhere in the white space to reveal a pop-up menu. Choose Add Columns.
5. In the resulting Add Columns dialog box, select a column name and click Add.
6. Repeat as desired and then click Close.

ACT! displays the added columns all the way to the right in the Contact List view. It isn't likely, however, that you want your new columns simply added at the end (all the way to the right). Fortunately, you can rearrange the columns.

To rearrange columns in your Contact List view in Classic:

1. Click on the column header for the column you want to move and drag to the left. The pointer turns into a closed hand as you drag.



4: You must scroll to the blank space to add columns in Classic's Contact List view.

2. Drag the column header so that it hovers over the two columns in between which you'd like to place the column, as shown in **Figure 5**.
3. Release the mouse. The column header and its field data moves to the new location, as shown in **Figure 5**.

Watch For: When you drag column headers from the far right to the far left, ACT! won't scroll with you. To work around this:

1. Drop the column as far to the left as possible.
2. Use the bottom scroll bar to scroll as far to the left as you can, but the moving column must remain visible.
3. Click on the column you want to move again and drag to the left.
4. Repeat as necessary.

Wisk away the waste

If you add too many columns to your Contact List view, you risk information overload and being forced to scroll to the right to locate pertinent columns. Fortu-

nately, you can delete columns that you don't really use from the view. Remember, deleting columns only removes them from the view — not from your database or other views.

To delete columns in your Contact List view in 2006:

1. In Contact List view, click the Options button in the upper-right corner of the Contact List view. Select Customize Columns from the resulting pop-up menu.
2. In the resulting Customize Columns dialog box, select the column you want to remove from the Show As Columns In This Order list box. We selected Private Contact.
3. Click the single left arrow (the inactive arrow below the circled arrow in **Figure 1**). The column name disappears from the Show As Columns In This Order list box and appears in the Available Fields list box.

4. Repeat for more columns, if desired. When complete, click OK to close the dialog box and implement the changes.

To delete columns in your Contact List view in Classic:

1. In Contact List view, click on the column header for the column you want to delete. The pointer turns into a closed hand as you drag.
2. Drag the column header up until it turns into a trash can icon and then release the mouse. Alternatively, you can drag the column header as far to the left or right (without scrolling) as possible and then release the mouse pointer.

ACT! removes the column from view. If you realize you need the column later, simply add it back using the steps in the "Add and arrange Classic Contact List view columns" section in this article.

Company	Contact	E-mail Address	Phone	Phone Ext.	Title
Contactivity	Chris Pumphrey		[1] 918-555-4815		Vice President Operations
Continental Energy	Herman Getter		[1] 480-555-8656		Marketing Director
Corporate Forms, Ltd.	Kristi Cameron		[682] 33 02 1		Cardiothoracic Surgeon
CPQT	Dr. Deiter Brock		[682] 33 02 1		

Company	Contact	E-mail Address	Phone
Contactivity	Chris Pumphrey		
Continental Energy	Herman Getter	herman@continental123.com	[1] 918-555-4815
Corporate Forms, Ltd.	Kristi Cameron	klynn@corpfrm.net	[1] 480-555-8656
CPQT	Dr. Deiter Brock	deiterbrock1@cpqt.co.ck	[682] 33 02 1

- 5: Drag and drop columns in Contact List view to display them right where you want them.