

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

Application: ACT! Classic/2006



AT A GLANCE

Just like ACT! pros, you use Contact List view to find your contacts fast. But you can use Contact List for more than just locating contacts — with the view's Tag mode, you can boost your productivity when you create new groups to target your sales efforts and your reports.

To streamline your efforts with tags, we'll:

- Discuss Tag mode and use it to select specific contact records that meet your target needs.
- Create a new group from the tagged contacts for speedy new groups.
- Clue you in to other ways you can enhance sales with Tag mode.

In our series “ACT! like a pro with immediate access to your contacts in Contact List view,” we've introduced you to Contact List view and shown how to use the default view or a customized view to streamline your searches. Maybe you wondered why in ACT! Classic you can edit the contact records right within Contact List view, while in 2006, you must open the record in Contact view first. **Reason:** Tag mode — Classic offers the Edit mode for viewing and editing contacts and Tag mode so you can narrow your lookup results to target specific contacts within your lookup results. Although 2006 handles editing and tagging a bit differently in 2006, you can use our review of Tag mode to take your Contact List view to the next level.

Make new groups with ease

Many ACT! users group contact records to organize contacts by the contact type (e.g., Friends, Customers, and Vendors). Let's say you own a landscaping company and want

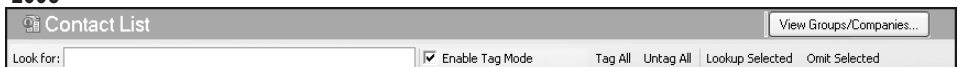
to create a few new groups to subcategorize your customers by which service they buy: landscaping, lawn mowing only, or snowplowing. With Tag mode, you can make the new groups in a few clicks. To start, we'll use Contact List view and tagging to select the contact records for your new group.

To select contact records for a new group using Tag mode:

1. Perform the initial lookup by selecting Lookup | ID/Status. The Lookup dialog appears.

2. Type *customer* in the ID/Status text box and click OK.
3. ACT! 2006 switches to Contact List view. For ACT! Classic, click the Contact List button on the Navigation bar to switch to Contact List view.
4. To switch to Tag mode, select the Enable Tag Mode check box, as shown in **Figure 1**. (In Classic, select Tag Mode from the dropdown list shown in **Figure 1**.)

2006



Classic

Edit Mode	Tag All	Untag All	Lookup Selected	Omit Selected	
Edit Mode			Contact	Phone	Phone Ext.
Tag Mode			Dylan Nguyen	[1] 602-444-5410	
Best Lender Financing			Benny Lender	[1] 847-555-9100	

1: You can easily change to Tag mode no matter what version you use.

5. Click on each record that you wish to add to the new group. As you click, you highlight, or tag, multiple items, as shown in **Figure 2**. (In Classic, ACT! adds a plus sign in the far left column, as shown in **Figure 2**.)

Now you're ready to remove unwanted records from view.

To limit your lookup based on tagged contracts:

1. Remove all records you *did not* tag by clicking the Lookup Selected button on the toolbar. (In Classic, click the Lookup Tagged button on the toolbar.)
2. Remove all records you *did* tag by clicking the Omit Selected button on the toolbar. (In Classic, click the Omit Tagged button on the toolbar.)

ACT! removes the desired records from the lookup so you're ready to create your new group.

Create the new group

If you've created groups before, you'll find the steps to creating your new group from the tagged items quite similar to creating one from scratch.

To create a new group from tagged records:

1. Select Group | New Group from the menu bar. (In Classic, click the Groups button in the Navigation bar and then select Group | New Group from the menu bar.)
2. In the Group Detail window (Group Info window in Classic), enter the group name (and description, if desired) in the available text boxes.
3. On the Contacts tab of the Group Detail (or Group Info) window, click the Add/Remove Contacts button. The Add/Remove Contacts dialog box appears.
4. Click the Contacts button in 2006 to open the Select Contacts dialog box.

5. Choose Current Lookup from the Select From dropdown list as shown in **Figure 3**. (In Classic, select the Current Lookup option button as shown in **Figure 3**.)
6. Use the Add All button (looks like a double right arrow) to move contacts from the list box on the left to the list box on the right. (In Classic, click the Add All button.) This adds contacts to the group.
7. Click OK. Click OK again in 2006. ACT! adds the contacts to your new group.

Boost productivity and sales

You can use your new groups to target your campaigns by opening the group and calling those contacts, writing letters to them, or sending emails. Or, speed up your reporting by creating groups for which you typically run reports.

2006

Look For:	Company	Contact	Phone	Extension
<input checked="" type="checkbox"/> Enable Tag Mode	Ace Pet Store	Colleen McCarthy	(541) 555-3648	
	Ace Pet Store	Sandy Ryan	(541) 555-9842	
	Best Lender Financing	Benny Lender	(847) 555-2221	
	Brandee's Bakery	Liz Dittmeier	(208) 555-2445	
	Brandee's Bakery	Mackenzie Jensen	(208) 555-2211	
	Brushy's Golfing World	Paul Brushman	(455) 555-2221	
	Circle Photography	Jonathan Jenkins	(214) 555-2215	
	Continental Energy	Herman Getter	(918) 555-2451	
	Dittmeier Delights	Liz Dittmeier	(208) 555-2349	
	Freemont Corp	Dylan Nguyen	(735) 554-012	
	Goldfish Records	Annette Sharkey	(555) 555-2145	
	Graham Electronics	Ed Connor	0198 356712	

Classic

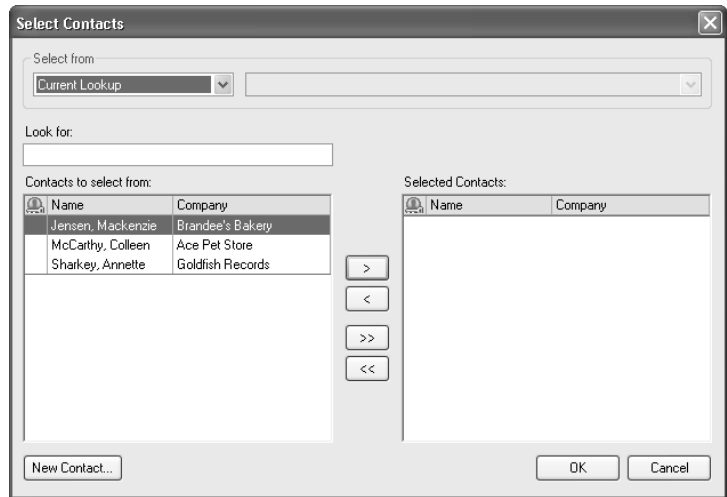
Tag Mode	Company	Contact	Phone	Phone Ext.
	Bechtel Corp.	Dylan Nguyen	[1] 602-444-5410	
	Best Lender Financing	Benny Lender	[1] 847-555-9100	
+	Brandee's Bakery	Mackenzie Jensen	[1] 480-555-0405	
	Brushy's Golfing World	Paul Brushman	[61] 4-555-39000	
	Continental Energy	Herman Getter	[1] 918-555-4815	
+	Goldfish Records	Annette Sharkey	[44] 555-1483099	
	HAL's Consulting Corp	Lames Jawson	[1] 503-555-4357	
	Hospital de la Gente	Silvia Carlini	[52] 9325-553709	
	Jake Flakes Inc.	Rudy Nordstrom	[1] 480-555-1616	
+	KKQS Radio	Bill Craig	[1] 480-555-9494	

- 2: Once in Tag mode, you simply click on each contact record you want to tag.

Alternative: You don't have to create a group for every possible scenario, however. Maybe you want to send a letter to a specific set of contacts, but probably won't write to them as a group again. Rather than cluttering your Groups view with unnecessary groups or writing each letter individually, you can write the letter directly from the Contact List view tagged list. Once you remove all the undesired records from Contact List view, simply select the desired option from the Write menu on the menu bar.

In the same way, you can even create a report based on your tagged lookup. Just limit your search and choose from the Report menu, and you're done!

2006

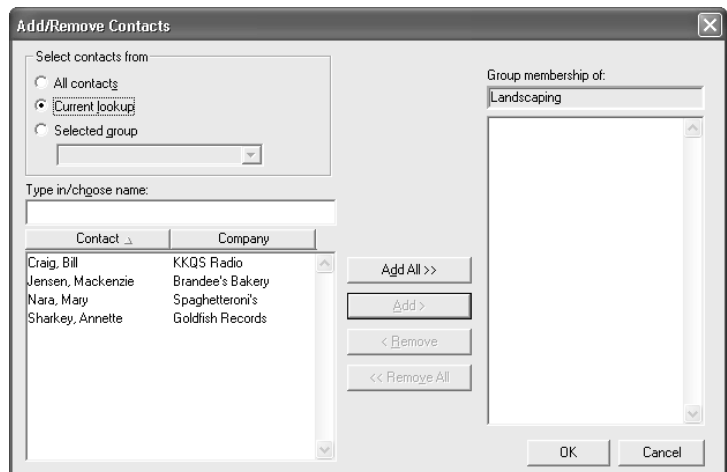


Subdivide groups for more flexibility

When you create groups, you can break contacts into subgroups. ACT! Classic has two levels of groups: Groups, and one Subgroup for each Group. All SQL versions (2005/2006/2007) have Groups and up to fifteen levels of Subgroups for each Group.

Important: In Classic, you can use the same subgroup name for multiple groups. In the SQL versions you can't use the same subgroup name twice — the database won't allow a subgroup for one group to use the same name as a subgroup for another group.

Classic



3: Choose your contacts from the current lookup so you can add them all to the new group, fast.