

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

Application: ACT! Classic/2006



AT A GLANCE

Comfortable in Contact view, few self-taught users ever venture into Contact List view, which makes searching for a contact fast and easy. To help, we'll show you how the pros use Contact List view in this first in a series of articles on how to make the most of the view.

To access and use the default Contact List view, we'll:

- Demonstrate how to access Contact List view and why.
- Examine simple steps for navigating in and out of Contact List view to make finding contact data quick and easy.
- Reveal a hidden Contact List view feature that will add a spring to your contacting steps.

Contact view is the king of the ACT! hill – every user knows it and uses it. But moving from contact to contact in that view takes a lot of clicking. You click forward to see the next contact, and often back to compare data, and then forward again. You can avoid the hassle with ACT!'s spreadsheet style Contact List view that you can put to use right now. We bring you the basics in this article, and we'll build on them in the next two articles in our series on how to work in and customize Contact List view.

2. Click the Contact List button on the toolbar. (In Classic, click the Contact List button on the navigation bar on the left.)

Notice the information immediately available to you. By scanning a particular column, you'll quickly find the exact record you're looking for.

Not convinced? Let's say you need to call someone at your largest client, but you can't remember the contact's name right off. You know you'll recognize it when you see it. You perform a lookup of the company name and receive thirty-six results.

In Contact view, you must click the Forward button, as shown in **Figure 2**,

Introducing Contact List view

ACT!'s Contact List view looks a lot like an Excel spreadsheet, as shown in **Figure 1**, and acts a bit like Windows Explorer. Therefore, many users find it easy to maneuver. To access the view:

1. Perform a lookup from Contact view.

Company	Contact	Phone	Extension	Title	Address 1
All Services	Andy Peterson	0174 267623		Sales Representative	1713 W. Hwy 101
All Services of UK	Ann Goodall	0191 254590		Chief Designer	Unit 34
All Services of UK	Angela Ives	0174 267623		Music and Lighting	67a Station Road
All Services US Operations	Amanda Form	(212) 966-7880		VP of Sales	2131 W. Hwy 101
ABS Garages Ltd	Arna Davison	0174 267623		President/CEO	
Auss Palm Stores	Colleen McCarthy	(541) 955-3648		Owner/Operator	825 Cobby St.
Auss Palm Stores	Sandy Ryan	(541) 955-9842		Buyer	325 Cobby St.
American Dreams	Hayleigh Fielda	(972) 955-9442		Vice President of Ph	1113 Greener
American Dreams	Dr. James Specter MD	(480) 955-1345		Marketing Director	1113 Greener
American Dreams	Kristi Cameron	(502) 955-4412		Manager	7201 N. Alameda
Arco&Ave. Florist	Jim Curtis	0191 234567		Manager	Down Buildings
Arco&Ave. Florist	Gavin Dillerstone	01742 876234		Proprietor	Down Buildings
Arco&Ave. Florist	Jackie Joergensen	(847) 959-2201		Sales Manager	4500 Piquette W
Black Forest Baluns	Beryl Lender	012 955-54		Manager	Grafenbuser Alle
Black Forest Baluns	Kristi Elwardorf				

1: With the Contact List view, you examine your lookup results in spreadsheet format.



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and then review the contact name in each record until you find the record you're looking for. The more results your lookup returns, the more clicking and searching you'll do – and that's wasting time you could spend on the phone with a customer.

Get around in Contact List view

Now that you know how to access Contact List view, let's see how easy it is to move around in it. We illustrate the navigation options in **Figure 3**.

To move around in Contact List view:

1. Use the scroll bar on the right side of the view to scroll through long lists of lookup results.
2. Use the scroll bar on the bottom of the view to scroll through columns that you can't see due to screen size limitations.
3. Click on a column header, such as Contact, to sort the results by that column, in ascending order.
4. Click on a column header's Sort triangle to resort the column in opposite order (e.g., change from ascending to descending).

ACT! offers several methods for moving back and forth between the various views from Contact List view. We show these options in **Figure 3**.

To switch views from Contact List view:

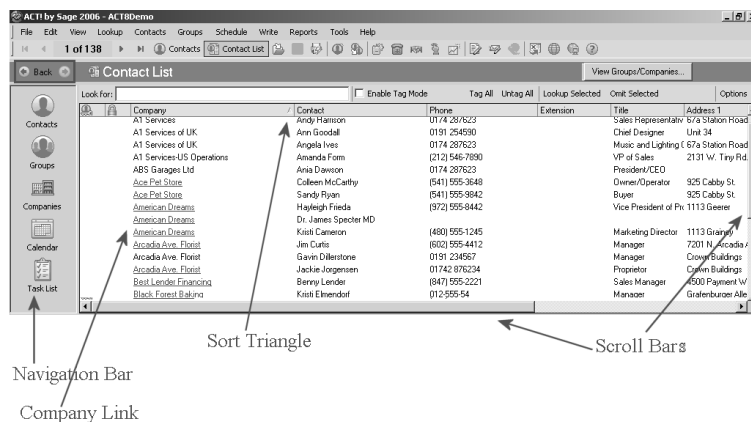
1. Click a Company hyperlink to switch to Company view for that company (2006 only).
2. Double-click on any row for a contact to open the Contact view for that contact. (In Classic, double-click on the small gray box to the left of the Company column.)

Insider Tip: If you're in tag mode in Classic's Contact List view, you can double-click on any row to open the Contact view for that contact.

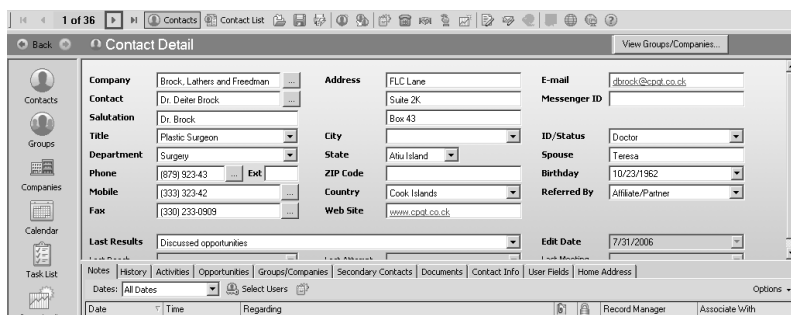
3. Use the Navigation bar to switch to different views.
4. Use the Back or Forward buttons to switch to recently opened views.

Benefit from a hidden navigation treasure

Many experienced ACT! users miss out on one of Contact List view's most handy feature — the option to jump to records by typing in the first letter of the record of the sorted column. For example, let's say you performed a First Name lookup of John and then wanted to jump to the specific company John worked for. You can do this in Classic and in 2006, but the steps are a bit different.



3: Getting around Contact List view is simple.



2: Clicking through record after record in Contact view wastes time compared to skimming through records in Contact List view (compare to Figure 1).

To jump to a record by first letter in 2006:

1. In Contact List view, click on the column header that holds the information to which you want to jump. (For our example shown in **Figure 4**, we selected Company in ascending order.)
2. In the Look For text box, enter the first letter of the word you want to jump to. As shown in **Figure 4**, ACT! automatically fills in the Look For text box with the first word with that letter. Furthermore, ACT! jumps in the list to the same record and highlights it for you.
3. To narrow the results, type in the second and third letters of the word you want to jump to. ACT! jumps to the first word that meets the additional criteria.

To jump to a record by first letter in Classic:

1. In Contact List view, click on the column header that holds the information to which you want to jump. (For our example shown in **Figure 5**, we selected Company in ascending order.)
2. Type the first letter of the word you want to jump to. As shown in **Figure 5**, ACT! launches a Look For dialog box and places the letter you typed in it. Furthermore, ACT! jumps in the list to the first record that meets the

criteria for the letter you typed, and highlights it for you.

3. To narrow the results, type in the second and third letters of the word you want to jump to. ACT! jumps to the first word that meets the additional criteria.

With Contact List view, you can do even more than we can show you here. For example, you can change the information that Contact List view displays and even use Tag mode to streamline future searches.

The screenshot shows the ACT! Contact List view with the 'Look For' text box containing 'Wedgwood Marshall & Wilson'. The 'Company' column is selected and sorted in ascending order. The search results are highlighted, showing the record for 'Wedgwood Marshall & Wilson' with contact 'Rob Hughes' and phone number '0208 264324'.

Company	Contact	Phone
Searchlight Casting	Gracie Anderson	(480) 555-3764
Sewing Room:The	Danielle Middlebury	(415) 555-2242
Sierra's Cafe	Brandon Sloan	(562) 555-2142
SimAero	Bruce Baker	(480) 555-2144
Slamtonabingbona Industries	Kyle Wetmore	(480) 555-2146
Spaghettaroni's	Mary Nara	(423) 555-2872
Spin Recording Studios	Anthony Keltie	0176 843070
Stevenson & Smith	Louise Harper	0191 290393
Studio Designs	Lucy Connor	0124 445323
Superclean	Mike Campbell	0191 230453
Superior Technologies Ltd	Neilson Watts	0164 222223
Swan Leisure Centre	Nicola Harrison	0191 743123
Swing Software	Ivan A. Stekopick	(011) 465-52
T-Bone's Steakhouse	Mike Underwood	(541) 555-2422
Tiny Town Productions	Ashley Allan	(480) 555-2451
Unique Systems	Rebecca Salter	0196 467324
UZI International	Wilhelm Loke	(310) 555-2454
Verqe Records	Theodore Barrett Jr	(206) 555-4414
Verqe Records	Theodore Barrett Sr	(206) 555-4410
Verqe Records	Drew McLintock	
Verqe Records	Paul Henderson	
Video Rental Company:The	James Gutierrez	
Video Rental Company:The	Rebecca Ann Harvison	0678 234567
Wedgwood Marshall & Wilson	Rob Hughes	0208 264324
Widget Corporation	James Finlay	0190 524353
Widget Corporation	Max Headlong	
Williams Consulting	Andy Bosson	0151 886265
Williams Consulting	William Rosemann	(03) 680 4 4455
Williams Consulting	George Agen	(541) 555-2451
Willis Enterprises	Bill Willis	(480) 555-1232
Wiseman Paper Products	Tina Stewart	0191 987389
Yale Computer Company	David Yale	(541) 555-2212
Yellow Jersey Bike Shop	Lance J. Parker	(619) 555-8893

4: Jump to desired records by sorting by column and entering the first letter of the word for the record in the Look For text box.

Watch Out For:

Classic takes it jumps seriously, jumping so that the highlighted record is at the top, which seriously limits your view of the complete list. As shown in **Figure 5**, we sorted the Company column in ascending order, then typed w. Once it jumped, ACT! only displayed the w companies and those companies listed after it in the ascending order. When your Contact List view does the same, don't worry – just scroll up using the scroll bar on the right side to view the preceding contacts.

The screenshot shows the 'Look For' dialog box in ACT! Classic. The 'Look for' text box contains the letter 'w'. The dialog box is open over a list of contacts, and the first record, 'Williams Consulting', is highlighted.

Company	Contact	Phone
Williams Consulting	William Rosemann	[1] 541-555-3989
Willis Enterprises	Bill Willis	[1] 480-555-2000
Yellow Jersey Bike Shop	Lance J. Parker	[1] 619-555-0652

5: The Look For dialog box opens as soon as you press a letter key.