

Accelerate field data entry with a little pre-planning



AT A GLANCE

For your business to prosper, you need to enter critical data in ACT! quickly and accurately, but doing so is like leaping hurdles without proper training – for most of us, speed and precision don't mix. For a quick fix, decide on and edit the field value dropdown lists in ACT! to streamline the entry process and limit potential errors.

To streamline data entry with custom field values for dropdown fields, we'll:

- Examine why and how customizing field dropdown values will boost your productivity and accuracy.
- Remove unnecessary values and tweak the others for optimal performance

Your ACT! data is critical to your business's success, but for small business owners and salespeople who just want to get on to the next sale, entering it can be pure drudgery. If you're responsible for all data entry, you take pride in top-notch accuracy, and really feel the heat when something isn't right. Resolving the

Watch out when deleting Fields

If you delete a value that's currently in use, 2006 leaves the value in the field, but you can no longer use the value in other records. In Classic, ACT! removes the value from the field in the record you had open when you performed the delete, and leaves it blank, but leaves the value in that field for other records. For both Classic and 2006, once you delete a value, you can only perform a lookup of that value if you type it in (i.e., the dropdown item doesn't display in the Lookup dialog box.

problem is a simple two step process – limit the number of field values available in the dropdown list and customize the value names. Then, making dropdown selections is quick, easy, and virtually mistake-proof.

Eliminate unnecessary field value names

The first step you'll take to accelerate your field data entry is to examine your dropdown list fields in ACT! for fields you can eliminate. The goal is to limit the number of available selections per field so that you and others can make quicker selection decisions.

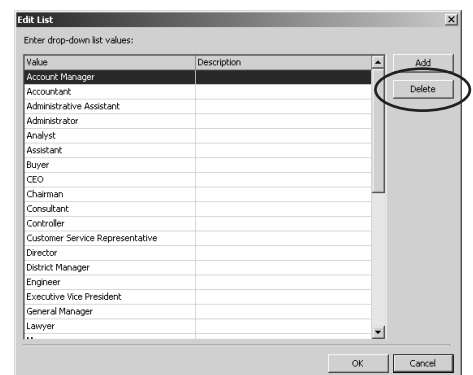
Take a look at the dropdown values for the Title field, for example. There you'll find more than two dozen values, many of which you probably never use. Take a moment to review all field values before you choose the ones to eliminate, and then delete them.

To delete dropdown lists field values:

1. Click on the dropdown list for a field and choose Edit List Values. (In

Classic, scroll through to the bottom of the list and choose Edit List.) The Edit List dialog box opens.

2. As shown in **Figure 1**, select the value you wish to delete in the Value field and click Delete.
3. A dialog box appears asking if you wish to continue. Click Yes.
4. ACT! deletes the value. Repeat steps 2 and 3 until you've deleted all unnecessary values.



1: Simply examine the list in the Edit List dialog box and delete the values you no longer require.

Get more bang for your customizing buck

You can take the process to the next efficiency level when you customize your field value names so that, whenever possible, no field has names that start with the same letter. The benefit is that when each value has a different letter, you can easily make a selection by typing the first letter of the value you wish to use, and then pressing the Tab key to move to the next field.

For example, by default the ID/Status field has four values in the dropdown list that start with the letter C. As you normally enter the data for this record, your process may look something like this:

1. Tab into the ID/Status field.
2. Remove your hand from the keyboard.
3. Locate the mouse.
4. Click the dropdown arrow for the ID/Status field.
5. Scroll through the list.
6. Select the desired entry.
7. Return your hand to the keyboard.
8. Tab to the next field.

Your time is money, so step up the pace a little. If you customize your field value as we suggest, your process will look more like this:

1. Tab into the ID/Status field.
2. Press the keyboard key for the first letter of the value you wish to select.
3. Tab to the next field (ACT! automatically fills in the field with the value that starts with that letter).

As you can see, a little upfront decision making and effort cuts the steps from eight to three per field, per record.

Make wise choices

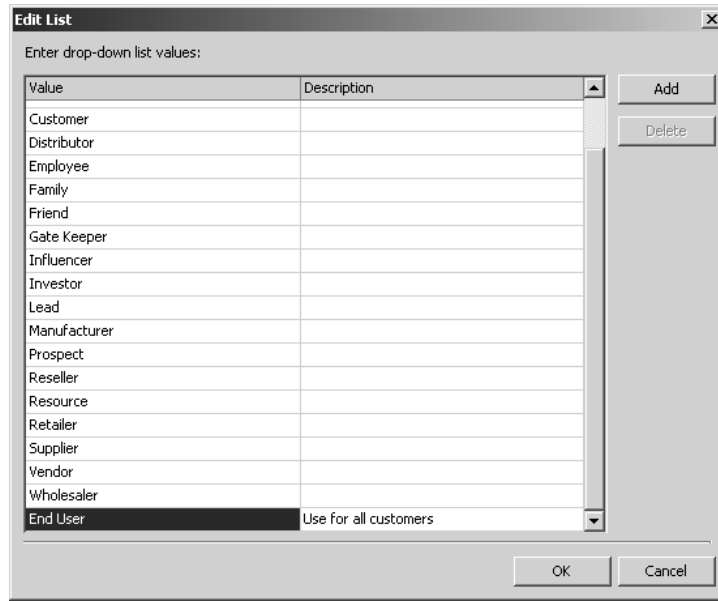
After you've axed unwanted field values, step through each field that uses a dropdown list again and determine if you need to rename any remaining field values.

Let's say you deleted the Competitor and Consultant values for the ID/Status field. This leaves two values with the

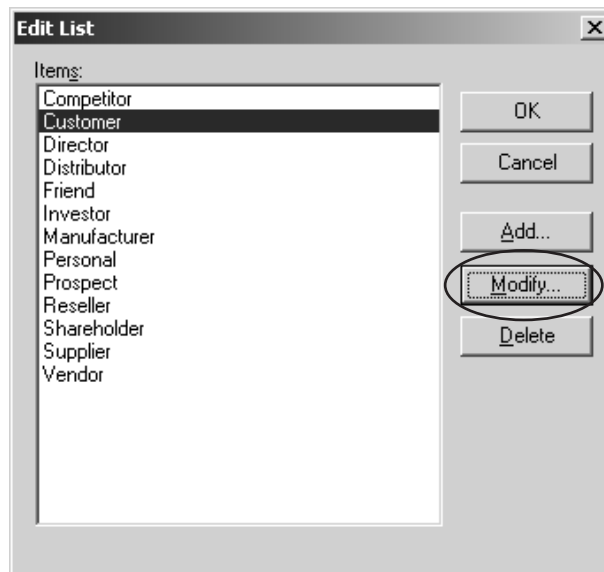
first letter being C – Contractor and Customer. You may wish to change Customer to something else, such as End User, depending on your product. Choose a new word that's accurate and doesn't use the same letter

as other remaining values, then make your changes.

As you'll soon see, Classic users can modify names in a dropdown list, but 2006 users can't. For 2006, you'll delete existing names and then create the replacement.



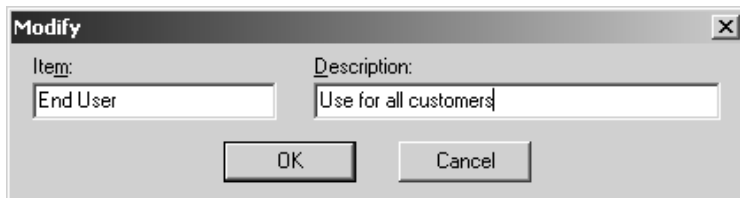
2: Add a new field value for a dropdown list with ease and add a description for yourself, if desired.



3: Built into Classic's Edit List dialog box you'll find a handy Modify option.

To modify value names in 2006:

1. Click on the dropdown list for a field and choose Edit List Values.
2. As shown in **Figure 1**, select the value you wish to delete in the Value field and click Delete.
3. A dialog box appears asking if you wish to continue. Click Yes. ACT! deletes the value.
4. Click the Add button to add the replacement value. Your cursor jumps to a blank field at the bottom of the list.
5. Enter a name in the Value field, and then double-click in the Description field to enter a description, if desired. **Figure 2** shows sample results.
6. Repeat steps 2 through 5 until you have all the correct field values.



The image shows a 'Modify' dialog box with two text input fields. The first field is labeled 'Item:' and contains the text 'End User'. The second field is labeled 'Description:' and contains the text 'Use for all customers'. Below the fields are two buttons: 'OK' and 'Cancel'. The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

4: Enter a new name for the value you want to modify and click OK, or add a description first.

Important! ACT! automatically uses the value name you last created as the value for that field in whatever record you have open at the time you add the value. To avoid this default, you can delete and add values using the Define Fields dialog box.

To modify value names in Classic:

1. Click on the dropdown list for a field and choose Edit List Values.
2. As shown in **Figure 3**, select the value you wish to modify in the Items list box and click Modify.
3. In the resulting Modify dialog box shown in **Figure 4**, enter a new name in the Item text box and a description in the Description text box, and then click OK.

4. Repeat steps 2 and 3 to modify other values.
5. Click OK when finished to close the Edit List dialog box.

With the legwork complete, you're ready to reap the rewards of simple data entry. Create a new test record if you wish and test how quickly you can move through selecting the right value for every dropdown field. ♦

Need help picking a value name?

Finding a value name that works for both accuracy and for the rule that only one value per field can use a certain initial letter can be tough. For help, turn to an on-line thesaurus. There are many to choose from, but some of the best are:

- Thesaurus.com. <http://thesaurus.reference.com>
- Merriam-Webster Online. <http://www.m-w.com>
- Roget's II: The New Thesaurus. <http://www.bartleby.com/62>