

OLIVIA CLARE LIMITED

CRM Education Help Sheets

ACT! Database Preferences

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CRM Education produce help sheets, best practice documentation and bespoke courseware specifically for our clients. We try to ensure our CRM Users always enjoy a straight forward and easy CRM experience.

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Setting ACT! Default Preferences

Background

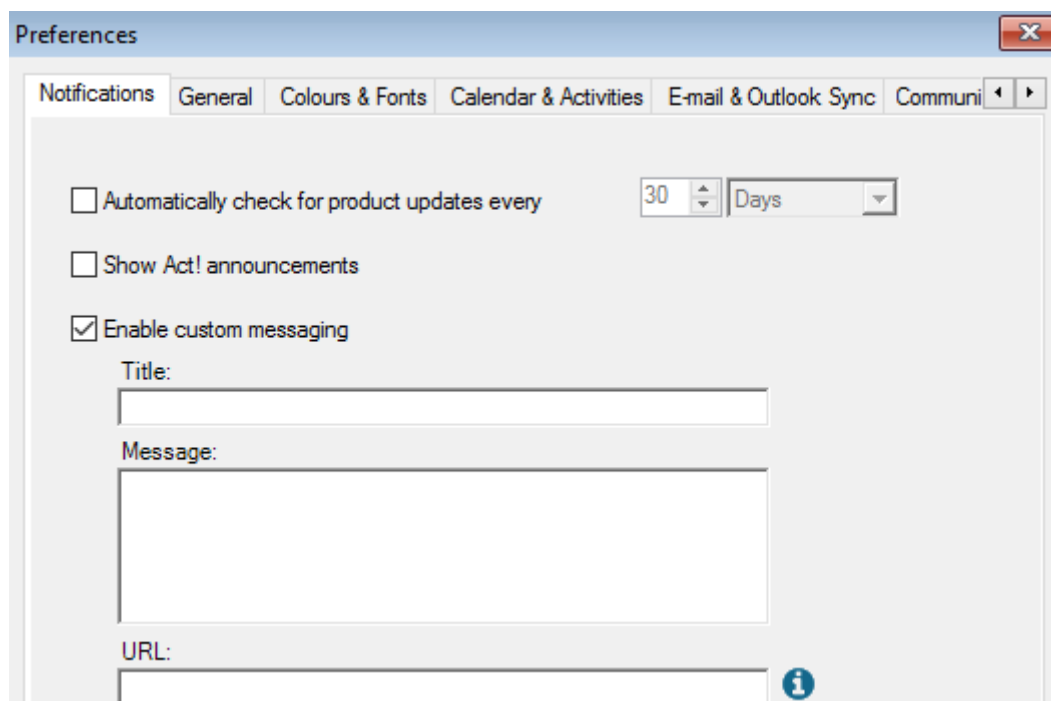
It is important when first setting up a new user, that when logging into ACT! the user has both consistent log in preferences with other ACT! users and also that system defaults are used to drive the user directly to relevant default working areas. In addition, it is important that ACT! works in a particular way so that any future history generated, data entered and functionality used is not only consistent for your users but that it also gives them a stress free and simplistic CRM experience. Version 17 came with a new feature that gives administrators the ability to set preferences not only for all existing users across the system, but applies these new settings to users too!

Logging into ACT!

You will be provided with a log in to your ACT! database by your system administrators. The screen that activates when logging in will be dependent on how the administrator has set the system to behave. It is possible to set ACT! so that this default is always the area of the system that you work with the most, once the default settings are created, ACT! will always open in the pre-set area. These default settings are accessed through the Preference Settings within ACT!

Setting default preferences

Open ACT! and log in with the user details allocated to you by your database administrator. Once the database opens, select **Tools > Preferences** from the main menu line. This will open the preference settings area:



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Many of the settings in preferences are self-explanatory, we have therefore concentrated on the key elements that we advise you to change in this help sheet. Each area we describe is split into its individual tab within the preferences area of ACT!

Notifications Tab

Automatically check for product updates

The important setting in this area is Automatically check for product updates every 30 days, we would stress that you do not set this option to automatically update as it is important that all users stay on the same version of ACT! and in particular, on the same version as the server hosting the database. Having different installations on different versions and patch updates can cause a multitude of problems.

Show ACT! Announcements

Ticking this option will ensure that any updates Swiftpage would like to make users of ACT! aware of activate on screen at log-on, using this facility is personal preference and only available in versions later than v17.

Enable Custom Messaging

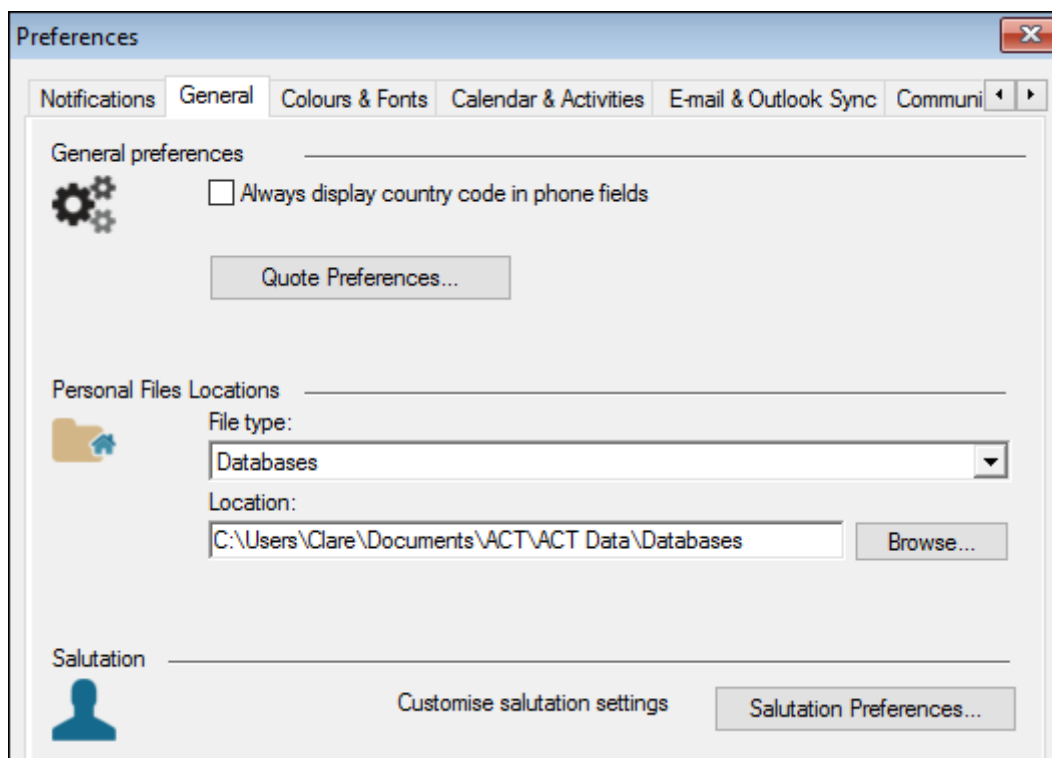
Similar to ACT! Announcements but this option allows users to create their own messages which activate as soon as a user logs into the database.

General Settings

General preferences are still unique to the logged in user, and can be changed for users in different roles or countries.

Always display country code in phone fields

One setting that you may change for International users or teams that work with contact not in the UK on a regular basis: Always display country code in phone fields. By selecting this option the country code will always populate the phone field when the country is entered followed by the phone number and then the record card is saved.



Quote Preferences

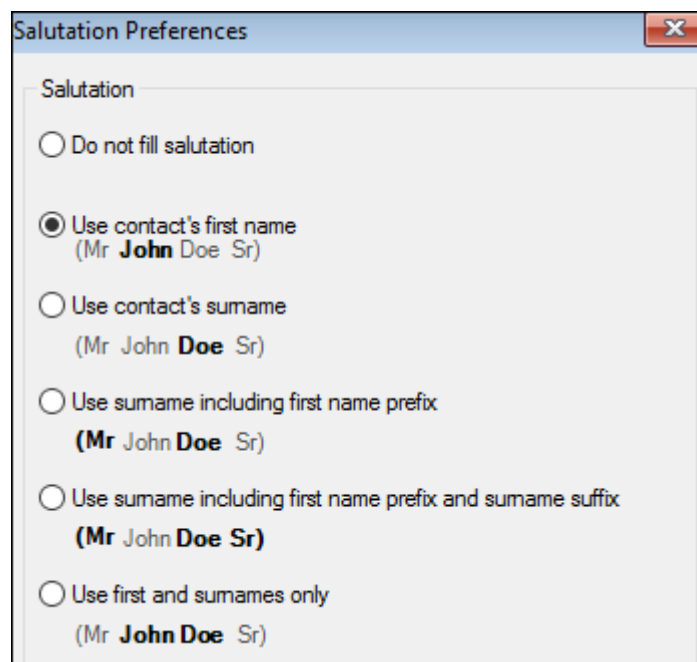
If quotes are used in the Opportunities area then the quote preferences can be set here.

Personal Files Locations

This area always displays the location of files for the logged in user and the path to the location that the files reside in, use the drop down list to view additional file types and where they sit or are saved.

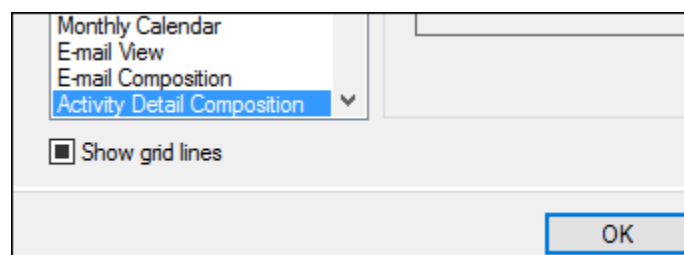
Customise Salutation Settings

When creating a mail merge document or other correspondence from within ACT! the system will use the salutation field to personalise the letter, fax, email. Setting the salutation settings here determines which convention ACT! will use to auto fill the field, the most commonly used being First Name. If prefixes are used then it is important that the user always makes sure that a valid prefix is entered in the contact name. Likewise if contact first name is used then the full first name must be entered as part of your data entry rules as if J Bloggs is entered for example then any correspondence will go out labelled "Dear J".



Colours and Fonts

ACT! has many grid areas that work in a similar way to excel spreadsheets. By default however, they are on a plain background and do not have grid lines. It is far easier on the eye to work within grid lines so we would advise that you take the time out to make this change for each user. Select the Colours & Fonts Tab, this is highlighted in the diagram above, and you will see a list of the areas within ACT! that work on a list view basis. To ensure grid lines default into this area, highlight the entire list by clicking on the first item, holding down shift and then clicking on the last item. At the bottom of the view you will see a check box, tick this check box and select OK:



The next time you access any list view, by default you will see grid lines in that area making the data held within the view much easier to read. As an example we have inserted a snippet of the contact list view below:

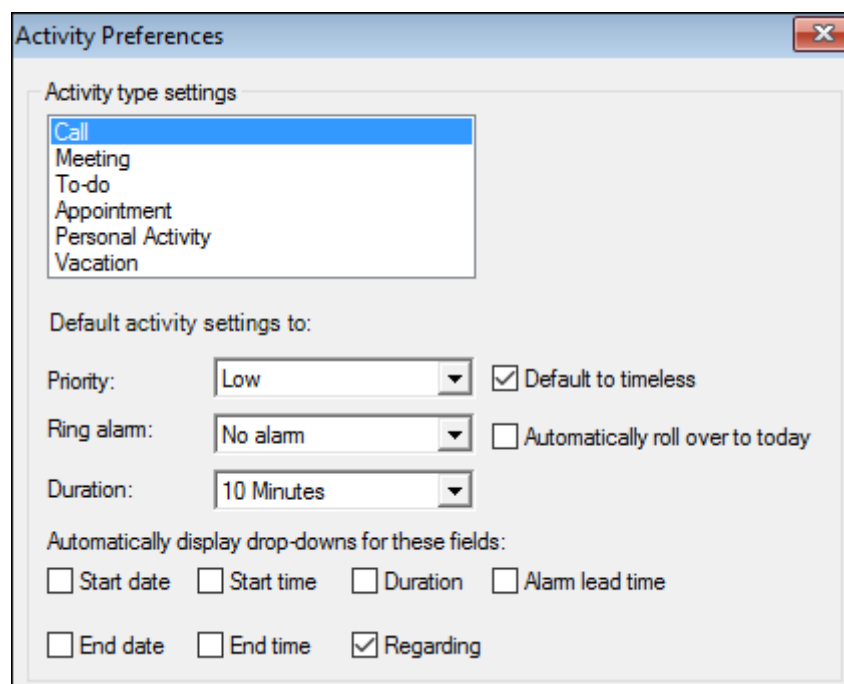
Company	Contact	Phone	ID/Status	Address 1	Address 2
			Lead		
			Lead		
			Lead		

Changing Fonts, Font Sizes and Appearance

In addition to grid lines you are also able to specify what font the system uses, the font size and also the background colours of areas such as the task list and contact list views. This setting does not really seem relevant but we find dyslexic people find it hard to see data on white backgrounds so we do change this to a softer colour for them when required.

Calendars and Activities

In the main the Calendars and Activities area of preferences is self-explanatory, we would however recommend that you make the following changes to the default settings, especially if you generate lots of phone call activity from within ACT! Click on the tab to activate it and once the tab is active, choose either Activity or Calendar preferences to make changes to the way ACT! behaves when scheduling. Before making any changes to the settings, ensure that you highlight the area you are about to change first, in the example below we have highlighted the call activity type before making our changes:

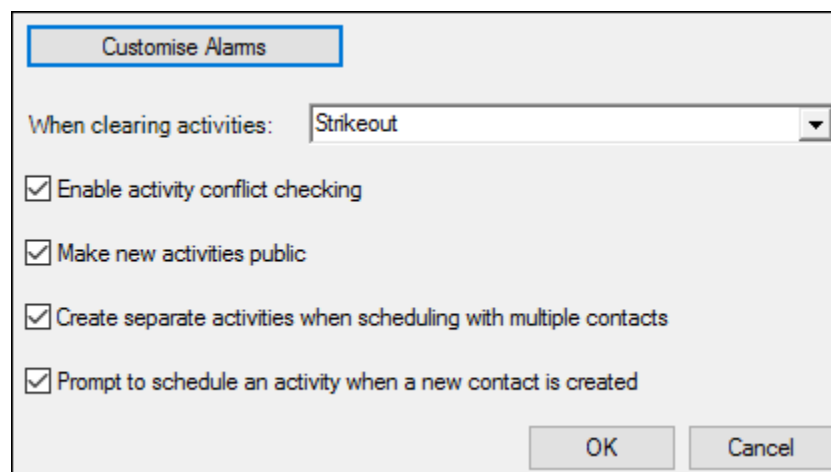


The top half of the screen allows you to set various items, some are less important but others we would strongly recommend should be set in a certain way:

- **Default to Timeless** – Select this check box to ensure that all calls are timeless, not selecting this option will mean that all calls are automatically allocated with a time. It is better to use a time only if there is a specific time that you need to make the call, for example a conference call. Timeless activities are easier to manage.

- **Ring Alarm** – It is better to use the Task List to pick up activities when they are due. Selecting the ring alarm option for all calls will mean the user is inundated with alarms which they will snooze or dismiss through frustration. It is possible to set an alarm on items that are really important and by using this method of only marking urgent items, you will ensure if an alarm does activate then the user knows it is of utmost importance.
- **Auto Roll Over** – Some users like activities that they have not completed to roll over to the next day. When auto roll over occurs however, the activities are re-allocated with a brand new time and date. This results in a user losing the ability to see how old an activity that is overdue actually is. We never set auto roll over but do teach users how to look at overdue activity in a past date range in the task list to control their workloads.
- **Regarding** – Making the regarding box mandatory will make sure that users always enter a reason for the call that they are scheduling. By doing so this will prompt the user to enter valid data about the reason for the call. This affects database usage in three important ways later. Firstly, if the call is way into the future the user will remember why they are calling without referring to history. Secondly a user can pick out their most important activities from the task list first by referring to the subject of the call, and thirdly if another user has to pick up the activity and complete it later they too will know exactly what the call relates to (especially if the user that originally scheduled it is not around anymore for whatever reason).

The bottom half of the scheduling screen allows you to set additional system behaviour and again these settings have an important impact on how the system works.



Customise Alarms

When clearing activities: Strikeout

Enable activity conflict checking

Make new activities public

Create separate activities when scheduling with multiple contacts

Prompt to schedule an activity when a new contact is created

OK Cancel

- **Enable activity conflict checking** – ACT! will duplicate the system and alert the user that the activity they are creating already exists. It is important that this setting is ticked for all activity types.
- **Make new activities public** – Private activities are only seen by the user creating them. We would advise that all activity is logged as public and that the user then just sets the privacy setting on personal activity such as personal reminders. Private activities should never be used for meetings where multiple users are accessing and scheduling for each other in a central calendar.

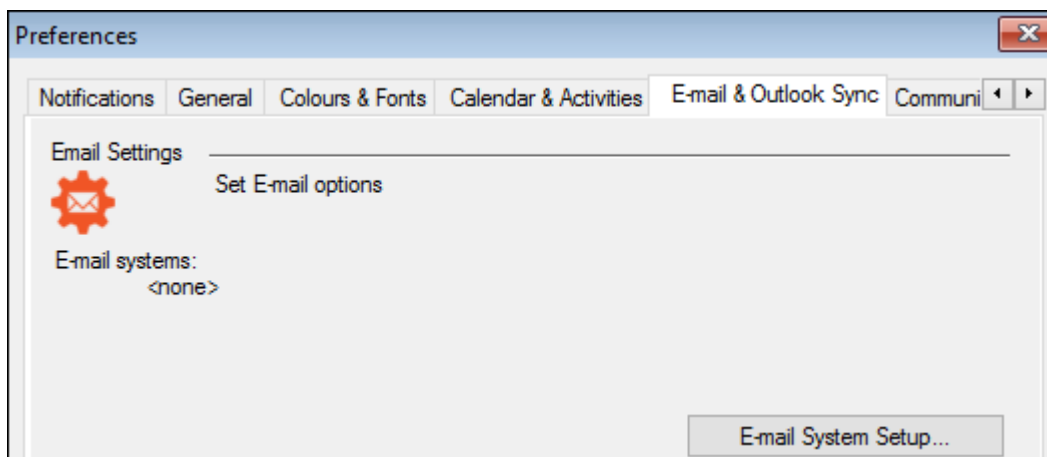
- **Create separate activities when scheduling with multiple contacts** – It is possible in ACT! to schedule the same activity for multiple contacts for example when following up a mailing campaign. If this box is not ticked, when the first call is cleared as complete, then any other activities scheduled with other contacts will be cleared too. Essentially ticking this box will always create a new and unique activity for each user included in the scheduling of the item.
- **Prompt to schedule an activity when a new contact is created** – Not really going to make an impact to use consistency when setting this option, it is more of a personal choice. But if you do want a new activity each time a contact is added then leave it ticked.

We have used the example to set calls above, however the options will remain the same for each area that you select and set. To change the next area, highlight the activity type and change the settings consistently for each user.

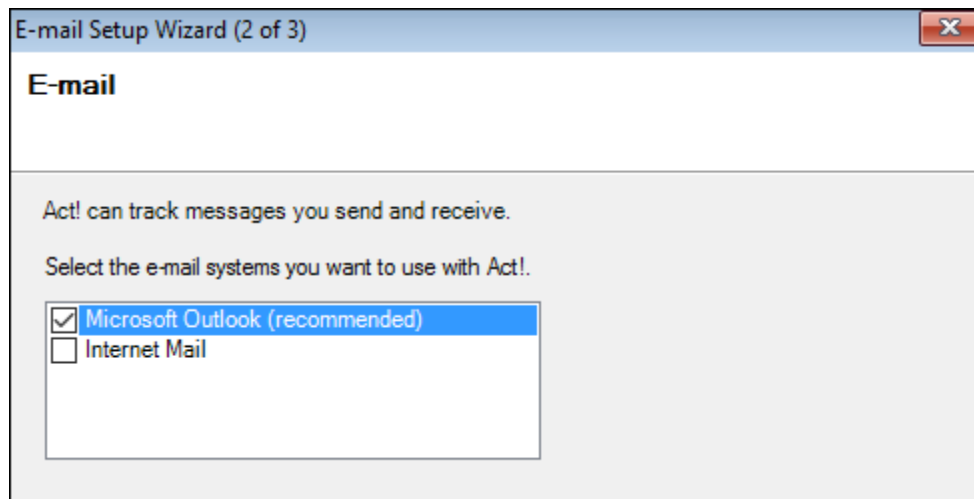
Email and Outlook synchronisation settings

Email Settings

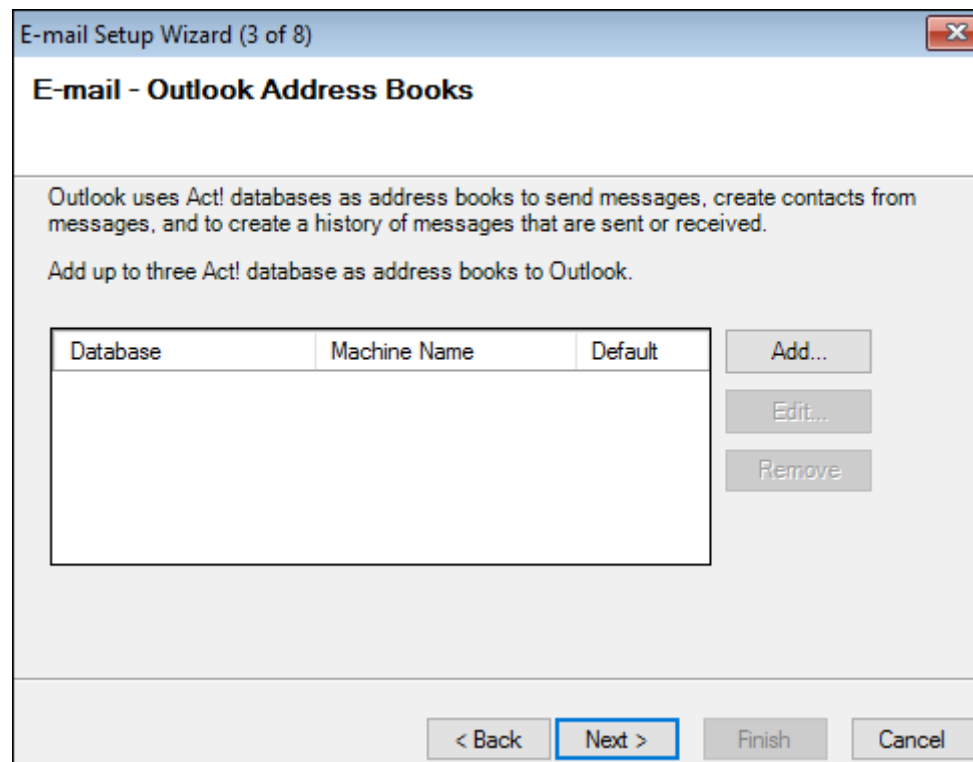
One of the key areas that you will need to make sure is set up not only consistently for users but also in the right way is the Email and Outlook integration, it is one of the most confusing areas to set correctly, simply because it is not very well explained in any ACT! help files! The first element we will look at in the synchronisation process is Email. Click on the Email and Outlook Sync settings and then the Email system set up tab:



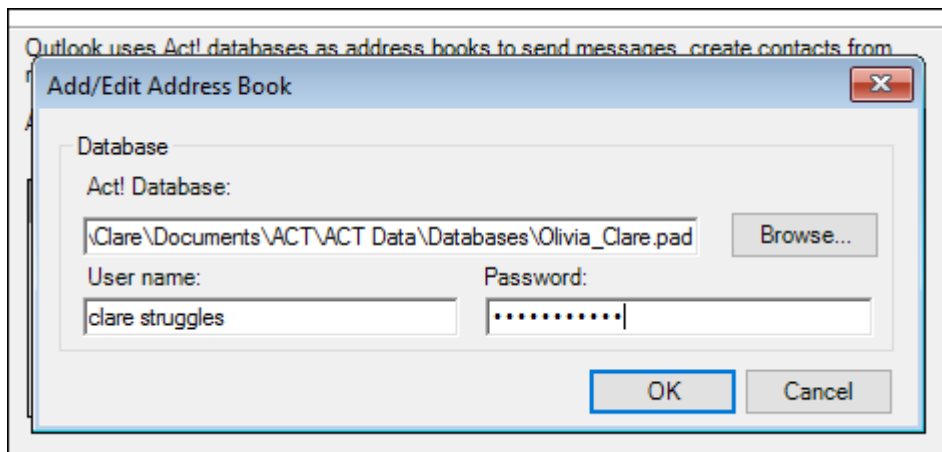
The following dialogue will open, select Next at the introductory screen and if setting up Outlook tick the selection box next to Microsoft Outlook:



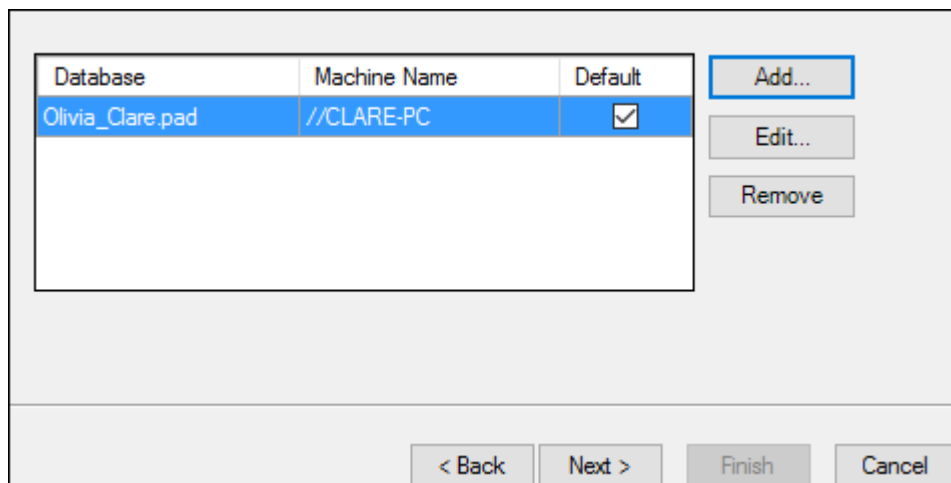
Select **Next** and at the following screen if your database is not currently listed select Add:



As long as you complete this configuration from within ACT! the correct database that you are already working in will be picked up as the default database. Enter your password to finish the link and select OK. This will set the default database, if you have any additional databases then repeat the process but it is important that you ensure you tick your main database as the default if you do have more than one.



The system will inform you that your changes will not take effect until you restart Outlook, select OK to this dialogue box and double check that the database details that you have added are correct, when you are sure, select Next.



At the next screen, select Microsoft Outlook (recommended) this will make Outlook the default editor and Outlook will always open a new email when you generate an email to a contact in the database. Once you have selected this option select Next:

E-mail - Editor

Act! uses an e-mail editor to read and write messages.

Select an e-mail editor.

Microsoft Outlook (recommended)

Select the e-mail system you want to use to send e-mail.

Microsoft Outlook

To create or modify an Act! e-mail signature, click Edit Signatures.

<None> Edit Signatures...

At screen 5 we would strongly in fact very strongly recommend that you use the option of None. Any other option set will mean that all emails are attached to ACT! from Outlook when you send and receive them. This results in an attachment process that you have no control over and ACT! will attach any emails that it cannot link to a contact to your own record card, this option can also cause problems if there are duplicates in the database.

In addition, it will attach absolutely everything so all irrelevant emails, that you would not wish to track will track too. The biggest benefit of manually attaching emails as and when you need them is that you will only attach anything that is relevant and important to both yourself and other users at a later date.

E-mail Setup Wizard (5 of 8)

E-mail - Record History

You can record history when you send e-mail to Act! contacts.

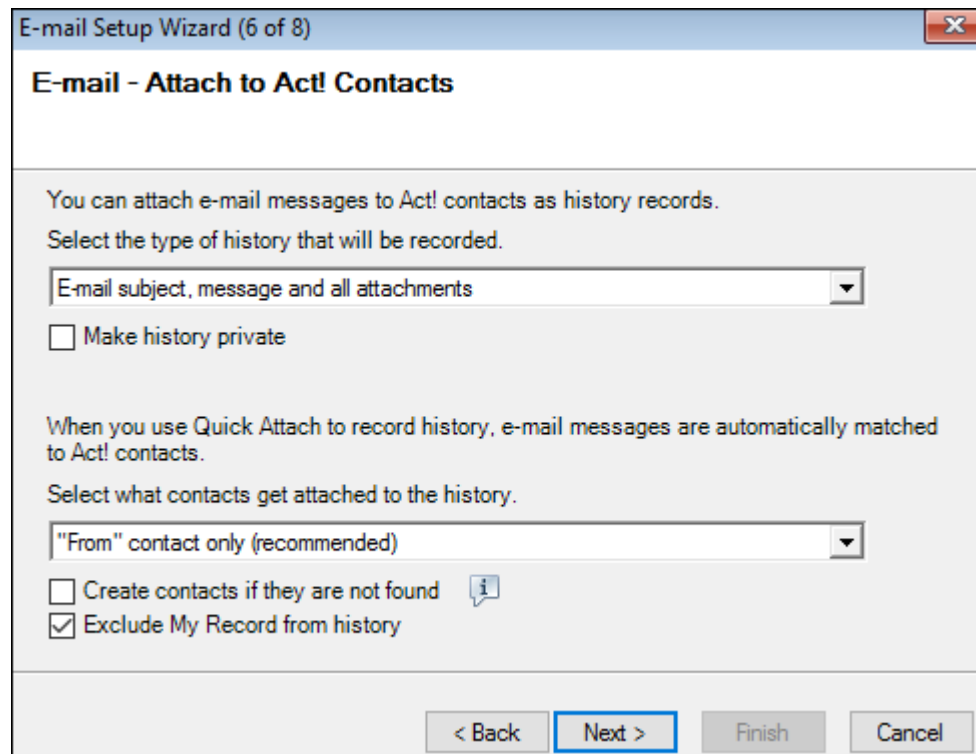
Select the type of history that will be recorded.

None

Make history private

Select None and then select Next:

The setting above is stipulating the default way that ACT! behaves when emails are sent. The next setting establishes how ACT! will attach emails if you manually attach incoming emails to ACT! We recommend that you use the last option in this screen. This will result in the entire email and its attachment being linked to the history area in one line. You can then double click this entry and open the email directly. The first option available only records the subject (we recommend this setting when logging a mail merge item). The second option drops the email text in the history area and it can truncate or change to foreign characters, in addition it does not include the attachment as part of the string.



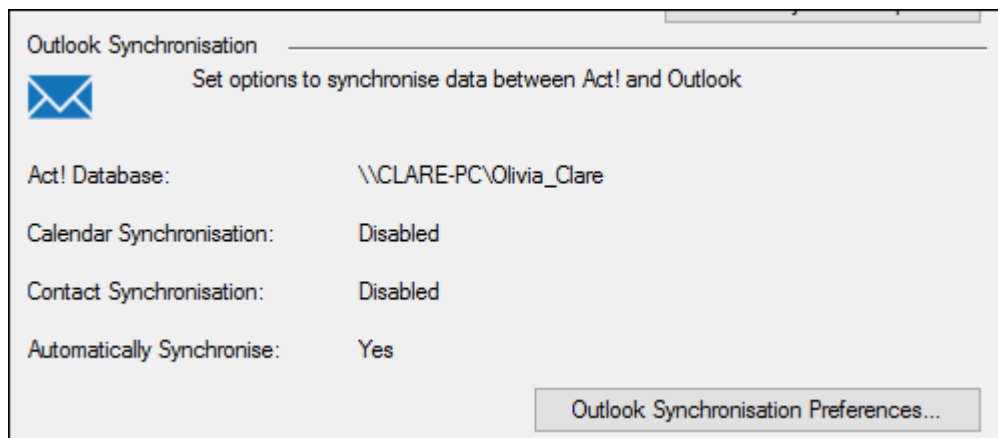
Leave make history private unticked as this will make the email only visible to the logged in user. We do not recommend that you use quick attach as again you lose control of the way the attachments link.

We do however strongly recommend that you tick the Exclude My Record from history option as failure to do so will mean that personal and internal emails are logged and some of these may be confidential. Once you have set the correct options select Next.

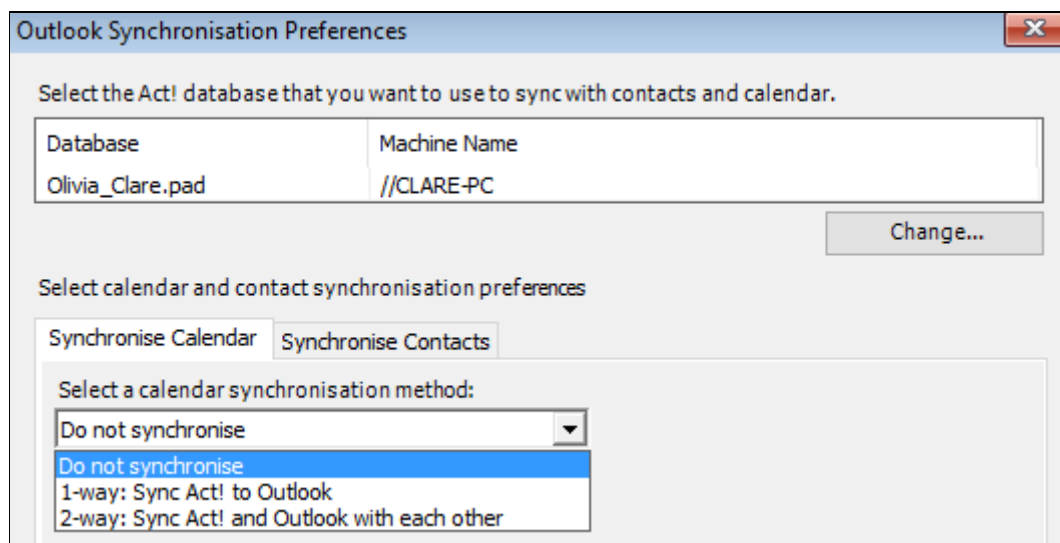
The next screen sets how you send invitations to activity participants from ACT! There are no set rules on how you set this area, it will be completely dependent on your companies own protocol on scheduling meetings and choose how to invite attendees. It is important to be careful how you use the create new contacts option however, if you have particular fields that are mandatory they will be ignored if you activate this option. We would therefore recommend that you leave it unticked. Click Finish to complete the wizard and to save the default settings.

Outlook Synchronisation

Once you have set the email area of preferences, it is also important that you set the Calendar Synchronisation and Contact Synchronisation settings.



By default, both settings are disabled. Click Outlook Synchronisation Preferences to change the settings. The default database will be displayed in the top section of the screen, you will then need to choose either Synchronise Calendar or Synchronise Contacts, dependent on which are you wish to set.



Synchronise Calendar

Again the choice you make will depend on your company protocols. We teach that you should always schedule your appointments in ACT! and sync to Outlook as then the activity is with the actual contact at all times, however you do have the ability to sync both. As long as the users are set up consistently again this setting will be down to the choice of your users and administrators.

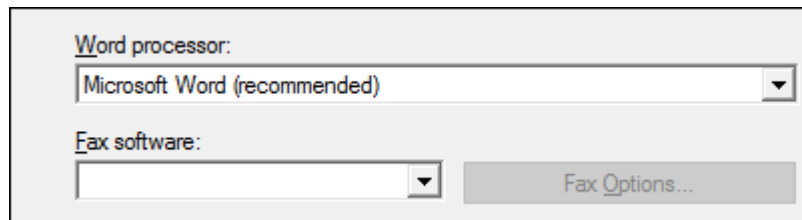
Synchronise Contacts

There are a lot of politics around synchronising contacts between Outlook and ACT! If this functionality is not controlled correctly, then personal contacts can be synchronised through to ACT! and in reverse, the entire database through to Outlook if not set up correctly. We would advise that

synchronisation sets are always used if you choose to synchronise data between Outlook and ACT! For more information on working in such a sensitive area, contact our consultants for free advice or refer to our help sheet on dynamic groups and creating sync sets for Outlook integration.

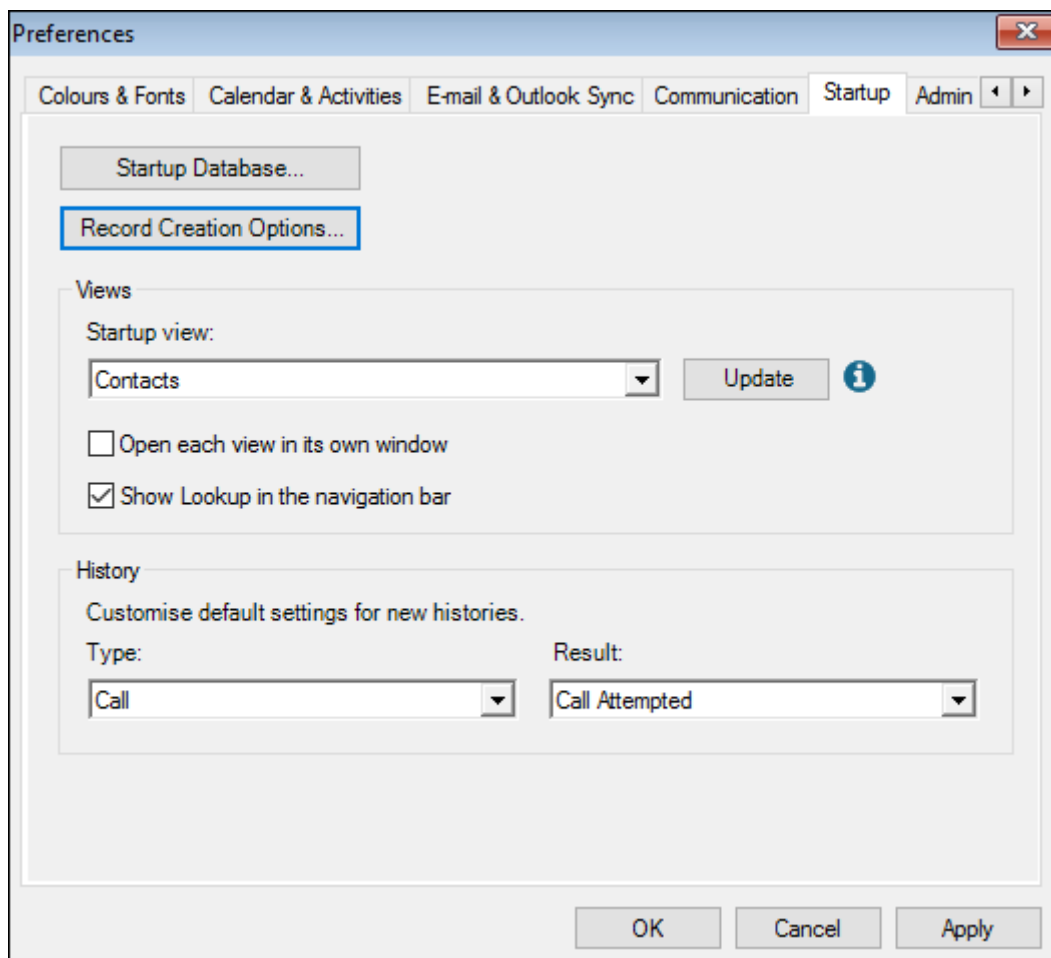
Communication Tab

Most areas within this tab are self-explanatory, however if you are integrating ACT! with Microsoft word then it is important that you ensure that the Word option is selected as the word processor:

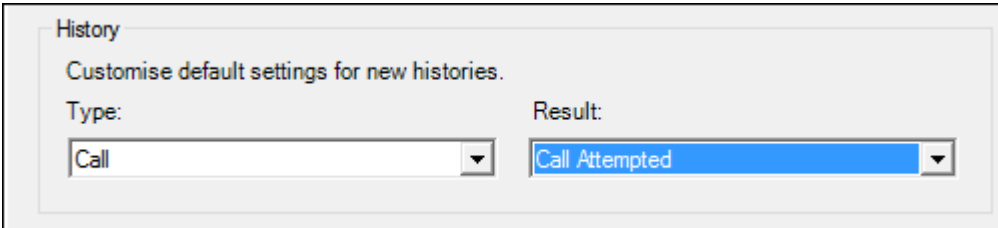


Start Up Options

Another important area where we set up the default areas of ACT! available to users as soon as they log in to the system:



- Start-up database - ACT! will always open the last database opened but you can however default the system to always open the same database each time it opens, useful if you have departments logging into various databases but predominantly using one area more than others.
- Record Creation Options – Allows you to set record types to be viewable by particular teams, users or as private records. Most commonly these areas are left public but it may be that you want just the Sales Team to see any opportunities you have with your contacts.
- Start-up view - Defaults to the Welcome screen but we advise this to default to contacts as this is the main area that users will work. However, in the case of a telesales team you may wish to default directly into the task list view as this would be their main working area.
- Open each view in its own window – We would advise that you leave the default on this option turned off, if ACT! opens multiple windows it can be extremely confusing, especially for new users.
- Show lookup in the navigation bar – Places an extra lookup field in the navigation bar.
- Customise default settings for new histories – In the later versions of ACT! you have the ability to set the default setting for new histories. This is a very popular new function as it allows you to use the most used history option. In older versions of ACT! the default was Appointment held, users had to change this setting constantly and it was very irritating. This new setting has become one of the most popular default settings in ACT!



History

Customise default settings for new histories.

Type:

Result:

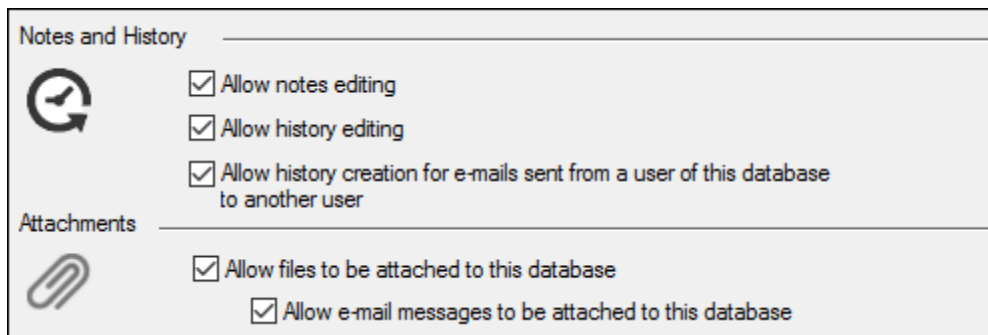
Admin Tab

The admin tab allows you to set specific rules for the system, this helps control some of the functionality users have access to and also sets some rules as to how the system works.

Notes and History/Attachment Generation

This area of preferences allows you to stipulate whether or not users are allowed to edit any existing notes and history including email generated history for the logged in user. Turning off these options means that the user can read them but not delete or make changes to these existing history items.

Note that there is also an option to allow history creation for emails sent from a user of this database to another user, we would recommend that you turn this setting off so that internal emails are not created between internal users of your business.



The screenshot shows a settings window with two sections: 'Notes and History' and 'Attachments'. The 'Notes and History' section has a circular arrow icon and three checked checkboxes: 'Allow notes editing', 'Allow history editing', and 'Allow history creation for e-mails sent from a user of this database to another user'. The 'Attachments' section has a paperclip icon and two checked checkboxes: 'Allow files to be attached to this database' and 'Allow e-mail messages to be attached to this database'.

You also have the option here to state whether files including email messages are allowed to be attached to the database. Be careful in this area as if you have a company policy to attach quotes for example, then unticking these options mean that users will lose the ability to attach them to the database.

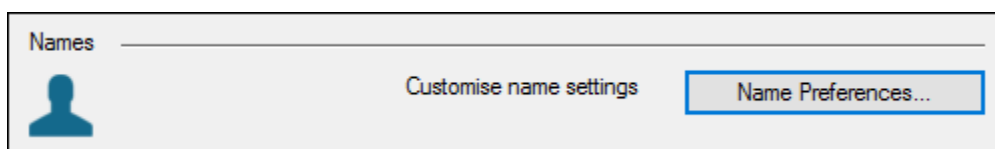
Customise Name Settings

Not so critical in a United Kingdom database but this setting can be very important if you have users in other countries. Some countries have far stricter rules on naming conventions and also more complex names so setting this area is important.

The salutation field in ACT! uses the first name and surname to establish how it automatically populates this field. If the salutation preferences are not set correctly, then the automatic population of the salutation field may not work correctly.

In addition, when searching the contact name field, ACT! will ignore any prefix and suffix data and search just for the value of the contact name. If any relevant prefix or suffix is missing, then ACT! will get the search criteria wrong. For example, ACT! knows that Mr is a Prefix so if the data is entered as Mr Joe Bloggs and the user just searches for Bloggs, then ACT! will ignore this prefix and return the contact in its search result. ACT! knows to ignore this prefix as it is in the prefix list in the preferences area.

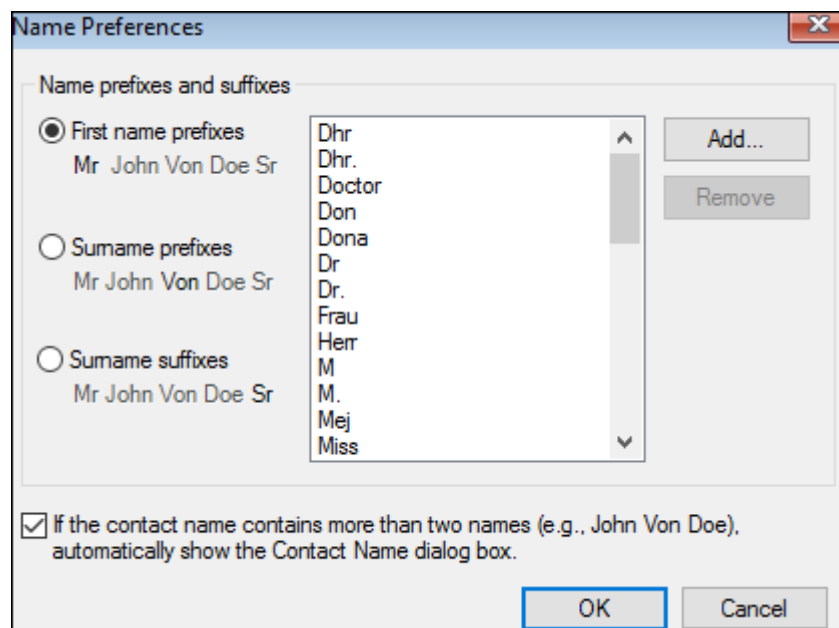
Finally, the first name and surname search options use this field, so if the name is complex then the field may populate incorrectly and then the search engine will not pick up the correct name on searches. Select the Name Preferences option to check the following:



The screenshot shows a settings window titled 'Names' with a person icon on the left. In the center, there is a link that says 'Customise name settings'. On the right, there is a button labeled 'Name Preferences...' which is highlighted with a blue border.

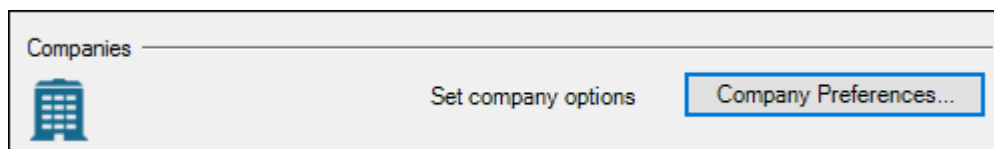
Check that any prefix, and suffix data required is in the list. Normally ACT! does have them all but you may have additional options in a non UK database.

Also check that the option where the contact name has more than two names option is ticked. By doing so if the user enters a slightly more complex name then ACT! will ask if it got the name correct in its salutation preferences. Once you have checked both areas select OK:

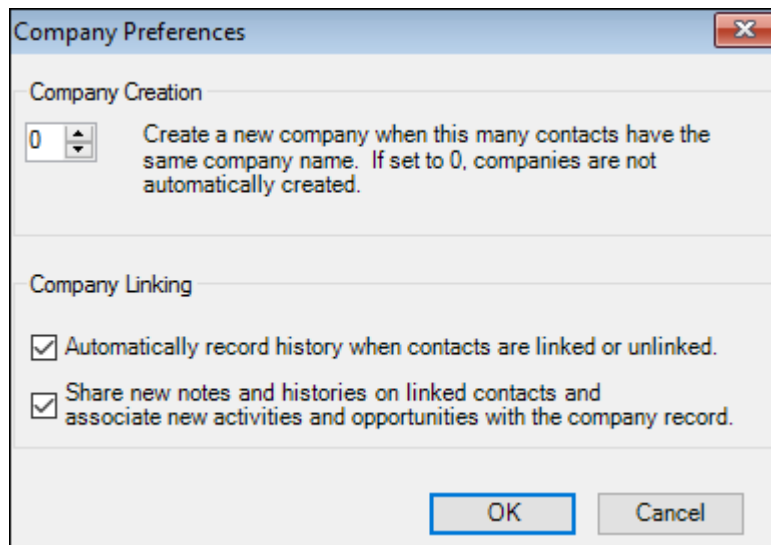


Company Preferences

Although ACT! is contact driven, companies can be created to hold contacts at the same company together. We always recommend that companies are only created where there is more than one contact at a company, creating companies for just one contact is not necessary. In this area of the system you can stipulate that a company is automatically created when you have more than one contact at a company and is an extremely useful function. Select Company Preferences to make sure the default settings are as you would like the system to work:

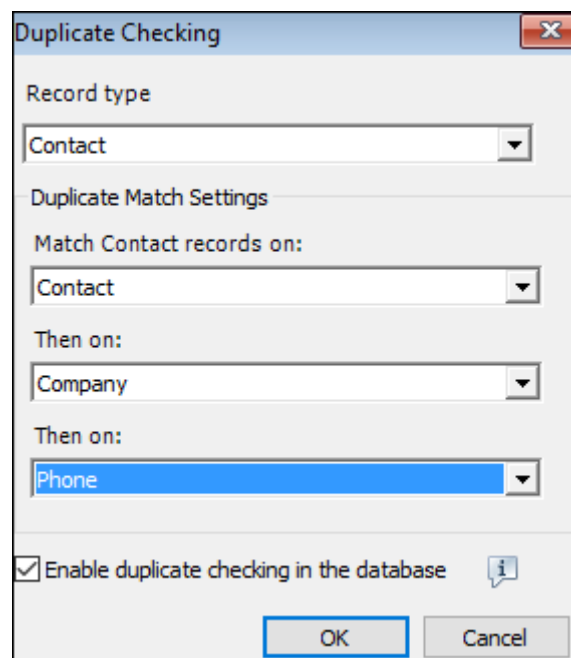


Once open we would advise you to change the default from one to 2 and always make sure that the company linking for history and shared notes and history options are ticked:



Duplicate Checking

It is absolutely essential that you at all times have the duplicate check feature turned on in your database. The default setting is a duplicate check on Company, Contact and Phone but it is possible to change the criteria to something more feasible if required, especially when doing bulk updates or imports. Failure to turn on duplicate checking will mean the users are never alerted of duplicate contacts in the database. With this in mind, always make sure the duplicate detection option is ticked:



Once database preferences are set, select Apply and Ok to apply your changes!

New Functionality Version 17 and higher

Olivia Clare Training

CRM Education – Swiftpage ACT! Resellers, CRM Consultants and Trainers

In older versions of ACT! administrators had to set the preferences for each individual user as they set up their profiles and in addition repeat the process for any new user joining the company. With version 17 and above there is a new update function on some areas of preferences. This can be found in the following areas:

- Calendars and Activities
- Communication
- Start-up

Selecting the update option will set that particular preference for all existing users and any new users that you create and is an extremely time saving function, ensuring consistency across all new users for these particular settings.