Gateway.

November 29, 2004

USING ACT - A BEGINNER's GUIDE

This procedure is intended to assist new users in their beginning use of ACT's basic features. The specific capabilities covered include:

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FINDING AN INDIVIDUAL'S SCREEN IN ACT

User Role	Action Steps
Normal ACT User	1. Click twice on the ACT icon to start up ACT. ACT! 2000
	 Enter your ACT user name and password (FLname & <mmmm>), which are the same as your network user and password, then click [OK]</mmmm>
	3. Notice the buttons on the left side of ACT's opening screen:
ACT! - [GLCG - Contacts]	
Elle Edit Contact Look	Write Sales Reports Tools Online View Window Help ▶ □ □
Contacts Contact List Groups Groups Literact	Gateway Christian Life Church Home Address 3901 Oak Hurst Circle Ron Ellis P.O. Box 163391 Sac, CA 95816 City Fair Oaks 916-966-1962 Ext. Ext. Zip 95628-7409 Ext. Last Results Web Site Web Site
Filter D 🔽 N	otes 🔽 Histories 🔽 Attachments 🔽 E-mail Insert Note Details
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4/9/2003 1	:13 PM Contact Deleted Mrs. Bonnie Brumfield - Gateway Christian Life REllis
Daity Calendar	Church 2:28 PM Sent Sync Sent changes to C:\Documents and REllis Settings\Ron\My Documents\ACT\Database\All Contacts.dbf: Records Sent: 27 Contacts 393 Notes/Histories 11 E-mail Addresses 1 Group 2 Activities Deletions: 14 Contacts 169 Notes/Histories 5 E-mail Addresses 75 Groups
Colord	ry Activities Sales/Opportunities Groups Profile Membership Maturity Ministry User
Lookup: All Contacts	Gateway <no group=""></no>

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User Role	Action Steps
	4. Find and reference or update a contact entry by selecting [Lookup]
	and [Last Name] (or other selection choice, e.g. First Name)

🚳 ACT! - [G	LCG - Conta	acts]									- <u> </u>
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Groups	ID/Stati	ID/Status			Web Site	0					=
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Calcilluar	·			Records 9 E-mail Adv	Sent: 27 Contac	ts 393 No	ites/Hi	stories 11			
				Deletions:	14 Contacts 16	2 Activitie 69 Notes/	, s Historie	es 5 E-mail			
Week	A Not	ee/Histony Activities Sal	es/Onnortun	Addresse:	s 75 Groups	Membe	rship	Maturity	Ministry	liser 4	
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					Gate	eway			<no grou<="" th=""><th>-dr</th><th><u> </u></th></no>	-dr	<u> </u>



User Role	Action Steps	
	5. Type in the selected value (e.g. the last name year and press [Enter] or click on [OK]	ou're searching for
Lookup Lookup Last Name	Search for Search for Last Name: Diuemel O Easth Seld	
 ○ <u>R</u>eplac ○ <u>A</u>dd to ○ <u>N</u>arrow 	e lookup ookup lookup	
	6. Note the number of folks found with this criter.	

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	Company	Home Address 3513 Bausell St.	
	Contact	Mrs. Audrey Bluemel	
Contacts	Title		
	Department	City Sacramento	
	Phone	916-487-5356 Ext. State CA	
Contact		Zin 95921	
		7. Press the Contact List button at left to see a list of all those fo	und
		8. Select from the list on screen the specific person you're looking	ng for
		and click twice on their entry to move to their screen	c

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🔯 ACT! - [0	GLCG - Contact List]					
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<u>]</u> M	1 of 14 🕨 🖻 🚰 🖡	1 0 0 0 4 1	5 2 ¢ (#	🍳 🗖 🖁		
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	Company	Contact 🛆	Phone	Pillie Ext.	Title	Address 1
Contacts	Ŧ	Mrs. Audrey Bluemel	916-487-5356			3513 Bausell St.
	+	Mr. Clare Bluemel	916-487-5359	Alt.		3513 Bausell St.
	+	Ms. Elise Bluemel	916-782 4			642 Nugget Ct.
	+	Mr. Jason Bluemel	916 - 9937	Worship		3836-A Delaware Ave
Contact	+	Mrs. Jennifer Bluemel	3-339-9937			3836-A Delaware Ave
List	+ Gateway Christian Life Cl	n. Pastor Ken Bluemel 🔎	516-966-3783	22		4148 San Juan Ave.
000	+	Miss Kendra Bluemel	916-944-4846			4040 Sangamon Stree
HHH	+	Miss Kristin Bluernel	916-782-7214			642 Nugget Ct.
Groups	+	Mr. Phil Bluemel	916-787-0555	1		642 Nugget Ct.
	+	Mrs. Sharon Bluemel	916-782-7214			642 Nugget Ct.
	+	Mrs. Sherie Bluemel	916-944-4846			4040 Sangamon Stree
	+	Ms. Tabitha Bluemel	916-944-4846			4040 Sangamon Stree
Interact	+	Mr. Tanner Bluemel	916-944-2696			3836-A Delaware Ave
0	+	Ms. Tawnee Bluemel	916-944-4846			4040 Sangamon Stree

9	P. Reference the desired information on the selected screen and
	continue to:
	• Make updates as needed (<i>You are recorded as the last person to modify the screen.</i>)
	• Continue to author a letter, memo, fax cover or E-mail. (<i>Fax</i>
	from PC is also possible but not yet implemented at Gateway.)

WORKING WITH GROUPS

User Role		Action Ste	eps
Normal ACT user	10. Begin by selecting th	e Groups buttor	n at left.
🙀 ACT! - [GL0	CG - Contacts]		
Eile Edit	Contact Lookup Write Sales Reports Z Online Vie	ew <u>W</u> indow <u>H</u> elp	_ 6 ×
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Contacts Contacts Contact List Groups Groups	Company Gater Lemistian Life Church Contact Fullis Title Fullis Department Ext. dus. Phone Status Salutation Ron ID/Status	Home Address 3901 Oak P.O. Box 1 P.O. Box 1 City Fair Oaks State CA Zip 95628-740 Last Results Web Site	: Hurst Circle
	Filter 👂 🔽 Notes 🔽 Histories 🔽 Attachments 🔽	E-mail Insert Note	Details
	Date ∀ Time ∀ Type	Regarding	Record Manager At
lask List	■ 4/9/2003 1:22 PM Contact Deleted Mrs. Gail J ■ 4/9/2002 1:12 PM Contact Deleted Mrs. Gail J	ohnson - a Ramfield - Geteureu Christian Life	REIIIs REIIIs
	Church	e brunneid - diateway christian Life	TTE IIIs
Daily Calendar	∰ 4/9/2003 12:28 PM Sent Sync Sent Char SettingsV Contacts. Records E-mail Adc Detetions: Arbitement	ges to C:\Documents and on\My Documents\ACT\Database\ lbf: ent: 27 Contacts 393 Notes/Historie resses 1 Group 2 Activities 14 Contacts 169 Notes/Histories 51 75 Course	RElis Vall es 11 E-mail
Week	<u>Notes/History</u> <u>Activities</u> <u>Sales/Opportunities</u> <u>Gr</u>	oups <u>P</u> rofile Membership Mat	turity Ministry User
Lookup: All Cont	tacts	Gateway	<no group=""></no>

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		fieldin Steps	
	11. Observe the Groups S	creen as follows:	
😫 ACT! - [GLCG - Groups]			
Eile Edit Group Contact	ookup Wr <u>i</u> te <u>S</u> ales <u>R</u> eports <u>T</u> ools <u>O</u> r	iline <u>V</u> iew <u>W</u> indow <u>H</u> elp	_8×
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Contact List Contact Cont	D group(s), 120 sub G Guests & Contact: s & Misc. if Purpose Past Productions Talent Bank nool ia	GW Pastoral Staff GW Pastoral Staff	SIC Code
Groups interact interact Task List Daily Calendar Croups Croup	enter Add/Remove Co Direct Staff Extended Staff Ext	ntacts Company △ PH G Gateway Christian Life Chr 916-966-3 Gateway Christian Life Chr 916-966-3 Gateway Christian Life Chr 916-966-3 Ifin Gateway Christian Life Chr 916-966-3 Gateway Christian Life Chr 916-966-3 Gateway Christian Life Chr 916-966-3	Title 3783 5641 3783 783 783 783 783 783 3783 783 783 783 783 783 Resident Missional
Week	12. Select the group of in lower-level groups cli	Activities Sales/Opportunities Cor terest by clicking on its national terest by clicki	mtacts <u>User Fields</u> <u>Address</u> <u>ount Layout 2000r</u> me. To unfold the left of the name

13. Verify that the [Contacts] tab is being displayed

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User Role	Action Steps
	14. Select and move to the screen for a particular person by clicking on
	the gray button to the left of each name

Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit group Contact Lookup Write Sales Reports Tools Online Yew Window Help Pile Edit Group S-20 group(s), 120 sub Pile Edit Group Sales Reports Tools Online Yew Window Help Pile Edit Group Sales Reports Tools Online Yew Window Help Pile Edit Group Sales Reports Tools Online Yew Window Help Pile Edit Group Sales Reports Tools Online Yew Window Help Pile Edit Group Sales Reports Tools Tools Website Pile Fine Atts Talent Bank Pile Mem's Pile Fine Atts Talent Bank Pile Mem's Pile Fine Atts Talent Bank Pile Mem's Pile Mem's <	ACT! - [GLCG - Groups]	_	
Image: Contacts Image: Contacts <th>Eile Edit Group Contact Lookup Write Sale</th> <th>es <u>R</u>eports <u>T</u>ools <u>O</u>nline <u>V</u>iew <u>W</u>indow <u>H</u>elp</th> <th>Ð×</th>	Eile Edit Group Contact Lookup Write Sale	es <u>R</u> eports <u>T</u> ools <u>O</u> nline <u>V</u> iew <u>W</u> indow <u>H</u> elp	Ð×
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		<u>Notes/History Activities Sales/Opportunities Contacts User Fields A</u> <u>Account Lavorit 2000</u>	ddress



User Role	Action Steps				
	15. Notice that this will generate a screen for the selected person while also setting the current group and the one you are working in within ACT. In ACT terminology this group becomes the current 'LookUp'				
ACT! - [GLCG - Contacts]					
Eile Edit Contact Lookup	Write <u>Sales Reports</u> Tools <u>Online</u> <u>View</u> <u>Window</u> <u>Help</u>				
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Contacts Contact Contact List Groups Cortact List Contact Title Department Home Phone Bus. Phone Mobile Phone Lalutation IDS Status	Bateway Christian Life Church Home Address 4148 San Juan Ave. Pastor Ken Bluemel				
Filter	lotes 🔽 Histories 🔽 Attachments 🔽 E-mail Insert te Details				
🗢 Date 🗸	Time V Type Regarding Record Manager At				
Task List 🙀 4/5/2003	95 AM E-mail Sent Subject: Small Groups in Homes Mr. Ronald J. Ellis d:\Program F				
4/5/2003	2:3 AM E-mail Sent Subject: 40-Days of Purpose at Gateway Apdate Mr. Ronald J. Ellis d:\Program F				
₩ <mark>₩</mark> 4/2/2003	11:05:1 E-mail Sent Subject: Getting folks to pay for their 40-Days Mr. Ronald J. Ellis d:\Program F books?				
Calendar 🔀 4/2/2003	3:57 PM E-mail Sent Subject: 40-Days Offering Envelopes in books Mr. Ronald J. Ellis d:\Program F				
3/31/2003	3:46 PM E-mail Sent Subject: Pastor Ken - Please verify that Saddlebac Mr. Ronald J. Ellis d:\Program F				
3/26/2003 ⁻	11:39 PM T-mail Sent Subject: 40-Days LAUNCH TEAM * meeting Ronald J. Ellis d:\Program F				
Week	ory <u>Activities</u> <u>ales/Opportunities</u> <u>Groups</u> <u>Profile</u> <u>Membership</u> <u>Maturity</u> <u>Mix</u> y <u>User</u> +				
Lookup: Group	Gateway Staff: GW Pastoral Staff				
	16. Sort or refine the selected group by selecting the [Contact List]				

button at left.



User Role	Action Steps					
	17. Review and so clicking at the	rt or omit cei extreme left	rtain mer to	nbers of the sel	ected group by	
😂 ACT! - [GLCG - Contact List						
🗗 Eile Edit Contact Lookup	Wr <u>i</u> te <u>R</u> eports <u>T</u> ools <u>O</u> nline	<u>V</u> iew <u>W</u> indow <u>H</u> e	lp		_ & ×	
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Tag Mode	Tag All Untag	All Lookup Ta	gged 0	mit Tagged	_	
Compan	y 🛆 Contact	Phone	Phone Ext	t. Title	Address 1	
Contacts Gateway Christia	n Life Chr Pastor Thomas King	916-966-3783	32		4148 San Juan Ave.	
Gateway Christia	n Life ChuPastor Hirmand Askari	916-331-5641			4441 Myrtle Ave.	
🕂 🕂 🛨 Gateway Christia	n Life ChuPastor Ken Bluemel	916-966-3783	22		4148 San Juan Ave.	
Gateway Christia	n Life ChuPastor Leonard Carillo	916-966-3783	Worsh-71	Pastor	6420 Sagebrush Way	
Conta 🕂 🕂 Gateway Christia	n Life ChuPastor Suzanne Delfin	916-797-1551	23		4632 Danvers Lane	
Gateway Christia	h Life Chi Pastor Lisa Roome	916-966-3783	30		4148 San Juan Ave.	
🖉 🔊 📥 🛨 🗛 🗛 🖉	n Life ChuMr. Kevin Stebbings	916-966-3783	26	Resident Missionary	c/o Gateway CLC - 41	
Groups						

18. Click on the appropriate button at top [LookUp Tagged] or [Omit Tagged] to make the current change the current listing. (In the following example the screen is the result of selecting [LookUp Tagged])

😫 ACT! - [G	GLCG - Contact List]					
Eile Ed	lit <u>C</u> ontact <u>L</u> ookup Wr <u>i</u> te <u>F</u>	<u>eports T</u> ools <u>O</u> nline	<u>V</u> iew <u>V</u> ndow <u>H</u> e	elp		_ & ×
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	Company 🛆	Contact	Phone	Phone	Ext. Title	Address 1
Contacts	🕂 Gateway Christian Life Chu	Pastor Hirmand Askari	916-331-5641			4441 Myrtle Ave.
	🕂 Gateway Christian Life Chu	Pastor Ken Bluemel	916-966-3783	22		4148 San Juan Ave.
	🕂 Gateway Christian Life Chu	Pastor Suzanne Delfin	916-797-1551	23		4632 Danvers Lane
Contact List	⊕ Gateway Christian Life Chul	Mr. Kevin Stebbings	916-966-3783	26	Resident Missionary	c/o Gateway CLC - 41



MAKING USE OF THE CURRENT LOOKUP - E-MAIL

User Role	Action Steps
Normal ACT user	19. Use a selected group or LookUp to do perform a variety of tasks
	including:
	Printing Mailing Labels
	• Printing a Phone List
	• Sending and E-mail message
	For more advanced users:
	• Performing a mail-merge
	• Performing an E-mail merge
	\bullet

ACTI - [GLO	G - Contact List					
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	Tag Mode	<u>F</u> ax Cover Page	bokup Ta	gged Or	mit Tagged	-
	Company	🗐 Quick Fax	hone	Phone Ext.	Title	Address 1
Contacts	 Gateway Christian 	E-mail Message	5641			4441 Myrtle Ave.
	 Gateway Christian 	Other Document	3783	22		4148 San Juan Ave.
	 Gateway Christian 		1551	23		4632 Danvers Lane
	Gateway Christian	Edit Document Template	3783	26	Resident Missionary	c/o Gateway CLC - 41
Contact						
List		M <u>a</u> il Merge				
		T Modify Menu				
1000		E Houry Heng				
Groups						

21. Use the resulting E-mail screen to send your pre-addressed message
to the selected list. Type a subject and message and press [Send].
(Note: Pressing [Send] releases the message into outlook for actual
transmission. The next time you open outlook you can open and
examine the message in Outlook's 'Outbox' or simply press
Outlook's [Send/Receive] button.)

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🔯 ACT! - [GI	.CG - E-mail]		
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	Address book:	Type in recipient name:	Att ments: Interact Login
	ACT! Contacts	To 💌	
Contacts	Select fr <u>o</u> m:	To: Askari, Hirmand at Gateway Christian Life Church	
<u>N</u>	All Contacts 💌	To: Bluemel, Ken at Gateway Christian Life Church To: Delfin, Suzanne at Gateway Christian Life Church	Priority: Normal V 5:55 PM - 4/9/2003
Contact	Open Address <u>B</u> ook	To: Stebbings, Kevin at Gateway Christian Life Ch	Create history
List	Subject	Send	Send using:
000			Attach to contact(s)
			<u></u>
Groups			

MAKING USE OF THE CURRENT LOOKUP – LABELS

User Role		Action Steps				
Normal ACT user	22. Print	labels by s	selecting [F	ile] and	[Print] on the to	p menu.
😫 ACT! - [GLCG - Contact List]					
Eile It Contact Lookup	Wr <u>i</u> te <u>R</u> eports	<u>T</u> ools <u>O</u> nline	<u>V</u> iew <u>W</u> indow <u>H</u>	<u>i</u> elp		_ 5 ×
<u> </u> [] <u>N</u> ew	Ctrl+N	0 6 8 1	, 📝 🗐 🕼		🗑 ? 📓	
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Cor Bave	Ctrl+S	irmand Askari	916-32	Frione E	.xu Hue	4441 Myrtle Ave.
Save Copy <u>A</u> s	F12	en Bluemel	915 66-3783	22		4148 San Juan Ave.
Data Exchange	•	uzanne Delfin	6-797-1551	23		4632 Danvers Lane
		n Stebbings	916-966-3783	26	Resident Missionary	c/o Gateway CLC - 41
Co 🚑 Synchronize						
Synchronize Setup						
Backup						
Gr R <u>e</u> store						
Administration	,					
Set <u>R</u> eminders						
Int Arint	Ctrl+P					
Print Contact List						
Tas <u>1</u> GLCG.dbf		1				
2 All Contacts.dbf						
C:\Program Files\\5	160.Ibl					
GCLC-HS DOB Attend.	rep					
Cal	Alt+F4	1				
		-				_
Week						▼ ▶
Print ACT! data, or the currently ope	n file or item				St	aff: GW Pastoral Staff



Action Steps
23. Use the following screen to select 'Print Type' 'Labels' and then indicate the type of labels being used and press [OK]
The type of laces being used and press [off] First abeling the type of laces being used and press [off] First abeling the type of laces being used and press [off] Visit abeling the type of laces being used and press [off] Visit abeling the type of laces being used and press the Visit abeling the type of laces being used and press the Visit abeling the type of laces being used and press the Visit abeling the type of laces being used and press the Visit abeling the type of laces being used and press the Visit abeling the type of laces being used and press the
[OK] button.
Position
ent contact ent lookup ontacts Printer Printer Printer Preview Include data for contacts managed by

25. Choosing 'Preview' above will generate the following display where
you can view each page of the output and select [Print] to see the
printer selection screen and direct the output to a printer that is
ALREADY loaded with labels to print.
26. Choosing 'Printer' above will take you to the printer selection screen
and send the output directly to the printer.

OK

Cancel

Help



😫 ACT! - [GLCG - Contact List]				
Prey Page Next Page	Page: 1 🔽	Iwo Page Zoom In	Zoom <u>O</u> ut <u>Close</u>	
	Pactor Hirmand Jakari Gataway Christian Life Church 4001 Myrta Jua, Sacramang Cá, 95901	Pactor Kan Bluanal Gasaway Christian Lik Church 6169 San Juan Jua Fair Cake Cd. 95659	Pastor Sutanna Defin Gaseway Christian Life Church 6600 Danvers Lana Grante Exy, Cd. 95746	
	Mr. Kavin Sabbings Gaaway Christen Lik Church cis Gaaway CLC - 4146 San Juan dve. Reir Ceke, Cd. 65606			

MAKING USE OF THE CURRENT LOOKUP - PHONE LIST

User Role	Action Steps	
Normal ACT user	27. Print a Phone List by selecting [Reports] and [Phone List] on the temenu.	op
ACTI-[GLCG - Conta Pile Edit Contact I of 4 Tag Mode Contacts Contacts Contact List Gateway Gateway Gateway Task List	Lookup Write Reports 1200s Qnline View Window Help Lookup Write Reports 1200s Qnline View Window Help Phone List Contact Report Company △ Tagged Omit Tagged Age Christian Life Cr Task List Notes/History 148 San Juan Ave. ay Christian Life Cr History Summary ay Christian Life Cr History Summary ay Christian Life Cr Activites/Time Spent Contact Status Source of Referrals Group Reports Sales Reports Qther Report Edit Report Template	





- 29. Choosing 'Preview' above will generate the following display where you can view each page of the output and select [Print] to see the printer selection screen and direct the output to a printer.
 30. Choosing 'Printer' above will take you to the printer selection screen
- 30. Choosing 'Printer' above will take you to the printer selection screen and send the output directly to the printer.

- Contact List]							
Pre <u>v</u> Page <u>N</u> ext P	age Pa <u>ge</u> : 1	T Iv	io Page	Zoom	<u>I</u> n Zo	om <u>O</u> ut <u>C</u> lose	
	Phone	List		Roni Seot P.O.S Fair (lle Gaseway Christian I Dak Hunar Cincle ox 165591 Sac., CA 95 ake, CA 959598-7409		
	Company <u>C</u> Number of constant: 4	lontact	Phone	<u>Dr.</u>	Mobile Phone	E-mail Address	
	Gateway Christian Life C., P	lastor Hirmand öskari	916-001-0661		916-670-9501	Himioweyoughernell.	
	Gateway Christian Life C., P	assor Ken Elsemel	916-966-9769	22		kbisamel@calla.com	
	Gateway Christian Life C., P	lastor Suzanne Delfn	916-797-1551	22	816-226-6788	auganne@gatewayclc.org	
	Gateway Christian Life C. 1	ir. Kavin Sabbinga	916-966-9769	26		KevinginpactAsla.Org	
	Contact List] Prey Page <u>N</u> ext P	Contact List Prey Page Next Page Page: 1	Contact List] Prey Page Next Page Page: 1 IM Phone List Company Number of contact: 4 Gamay Christich Co. Resp Himmed Galard Gamay Christich Co. Resp Himmed Galard Gamay Christich Co. Resp Hammed Galard Gamay Christich Co. Resp Hammed Galard Gamay Christich Co. New Response Dath Gamay Christich Co. Michael Babbys	Contact List Prey Page Next Page Page: Image: Image: Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone List Image: Phone Phone List Image: Phone Pho	Contact List Prey Page Next Page Page: I I Iwo Page Zoom Prove Page Next Page Page: I Iwo Page Zoom Page Phone List Phone List Phone List Phone List Phone List Phone List Phone List Phone Phone Phone Phone Phone Phone Phone Phone Phone Phone Phone Phon	Contact List Prey Page Next Page Page: Iwo Page Zoom In Zo Image: Phone List Product State Rec BigSamay Christent Stot Gase HourtState Rec BigSamay Christent Stot Gase HourtSt	Contact List Prey Page Next Page Page: Iwo Page Zoom in Zoom Qut Close Image: Phone List Image: Phone List Bot Bit damas Children Line Bot Bit damas Bot Bit damas Children Line Bot Bit damas Bot Bit damas

31. Note above t reports inclue	hat there are several other options you can use with ding:
 •	'E-mail' to directly E-mail the resulting report as an attachment to an E-mail message, and 'File – Editable Text' to create a report output file that is formatted in Rich Text Format ('.RTF') which can

Gateway.

be opened inside Microsoft Word. (*This allows you to further enhance the report with a custom title, additional notes, etc.*) <u>NOTE:</u> When using the 'File – Editable Text' option you should have Word already opened and ready to display the report results.

MAKING USE OF SINGLE CONTACT (Letters, Memos, Fax Covers):

User Role	Action Steps
Normal ACT user	32. Use a selected contact to:
	• Begin typing a letter
	• Begin typing a Fax Cover Page
	• Begin typing a memo
	•
	By FIRST starting Microsoft Word and then bask inside ACT
	selecting [Write] and the appropriate choice.
🔓 ACT! - [GLCG - Contacts]	
Eile Edit Contact Lookun	Write Sales Reports Tools Online View Window Help

	lit <u>C</u> ontact <u>L</u> ookup	Write <u>S</u> ales <u>R</u> eports <u>T</u> ools	<u>O</u> nline <u>V</u> iew	ı <u>W</u> indow <u>H</u> elp			_ 8 ×
∐ K ≺ [2 of 4 → →	Letter Memorandum		i 🛃 (# 🍳 🗖	1 🖓 ? 🕯	¥ 🗊 🕸 🍤 🔗	
	Company	Eax Cover Page	ļ	Home Address	4148 San Juar	n Ave.	
Contacts	Contact Title	E-mail Message	E]			
N	Department	<u>O</u> ther Document		City	Fair Oaks		
Contact	Home Phone	Edit Document <u>T</u> emplate	. 🏼	State	CA		
List	Bus. Phone Mobile Phone	M <u>a</u> il Merge		Zip	95628		
N	Salutation	🔁 Modify Men <u>u</u>		E-mail Address	kbluemel@cali	s.com	
Groups	ID/Status			Last Results			
0	Web Site						
Interact		lotos 🖂 Historias – 🖂 Altan		n all least	Noto Dr	staila	
- 🥙 - I		Time V Tune	nments 💌 E-	-mail Insent		Becord Manager	
Task List	A/5/2003	3:05 AM E-mail Sent	Subject: Sma	all Groups in Homes		Mr. Ronald J. Ellis d:\	Program F
	kara 4/5/2003	2:33 AM E-mail Sent	Subject: 40-I on various ite	Days of Purpose at Gal ems 4-4-03	teway - Update	Mr. Ronald J. Ellis d:\	Program F
	A/2/2003	11:05 PM E-mail Sent	Subject: Get books?	ting folks to pay for the	ir 40-Days	Mr. Ronald J. Ellis d:\	Program F



User Role	Action Steps
	 33. Wait as needed for ACT to hand off to Microsoft Word and then begin to type your document. Save the document early (<i>before 10 or 15 minutes go by</i>) and issue the Microsoft Word print command.
	34. Printing will cause ACT to jump back in and ask if you need an envelope, if you'd like to save if you haven't and it ' <i>should</i> ' finally post a record and a link to the document on ACT's [Notes] tab for the concerned contact.

MAKING USE OF SINGLE CONTACT (Letters, Memos, Fax Covers):

Normal ACT user	35. Get the Name address and phone to paste into any application by pressing the [Copy to Clipboard] button on the toolbar.				
😫 ACT! - [GLCG - Contacts]					
Eile Edit Contact Lookup	Eile Edit Contact Lookup Write Sales Reports Tools Online View Window Help				
	🗲 🖬 🛍 🗃 📾 🖏 📝 💷	i 🐋 🕼 🖷	🗑 ? 🍄 🗊 🖉 🖗 📱		
Company	Gateway Christian Life Church	Home Address	4148 San Juan Ave.		
Contact	Pastor Ken Bluemel]			
Contacts]			
Department		City	Fair Oaks		
Contact Home Phone	916-966-3783 Ext.	State	CA		
List Bus. Phone	916-994-2362 Ext. 22	Zip	95628		
Mobile Phone					
Salutation	Pastor	E-mail Address	kbluemel@calis.com		
Groups ID/Status		Last Results			
		Web Site			
🛛 📈 🛛 Filter 🖂 🔽 N	otes 🔽 Histories 🔽 Attachments 🔽 E-	mail Insert	Note Details		
Task List 157 Date 7	Time ∀ Type :05 ΔM E-mail Sent Subject: Sma	Regarding	Record Manager At Mr. Bonald J. Ellis, d:\Program F		
M 4/5/2003 2	33.4M F-mail Sent Subject Million	Daus of Purnose at Gal	tewau - Undate Mr. Bonald J. Ellis d'AProgram F		
	36. Move to any applicatio	n and press th	e [Paste] button or press [Ctrl]		

So. Move to any application and press the [Paste] button of press [Ctrl]
& [V] to add the copied info:
Pastor Ken Bluemel
Gateway Christian Life Church
4148 San Juan Ave.
Fair Oaks, CA, 95628
Phone: [1] 916-966-3783
Fax: [1] 916-966-9134

Gateway.

WHAT ELSE?

User Role	Action Steps		
Advanced Users	37. ACT Can be used for a variety of more advanced purposes		
	Mail Merge to plain E-Mail		
	• Mail Merge to HTML E-Mail (with added software,		
	Mail Merge to Paper		
	 Mail Merge to Fax 		
	• Standard Letters (quickly produce Letter of Call to Ushers, etc.)		
	• Export Data (For example exporting a text format data list to Word to use in mail-merge fashion to produce nametags or a comma delimited list to open in Excel.)		
	• Perform data analysis (Number of folks involved in a group, folks at Gateway not involved in children's ministry, Staff members not included in Gideon's Army etc.)		