



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	 <ol style="list-style-type: none"> <li>Click twice on the ACT icon to start up ACT.</li> <li>Enter your ACT user name and password (FLname &amp; &lt;mmmmm&gt;), which are the same as your network user and password, then click [OK]</li> <li>Notice the buttons on the left side of ACT's opening screen:</li> </ol>

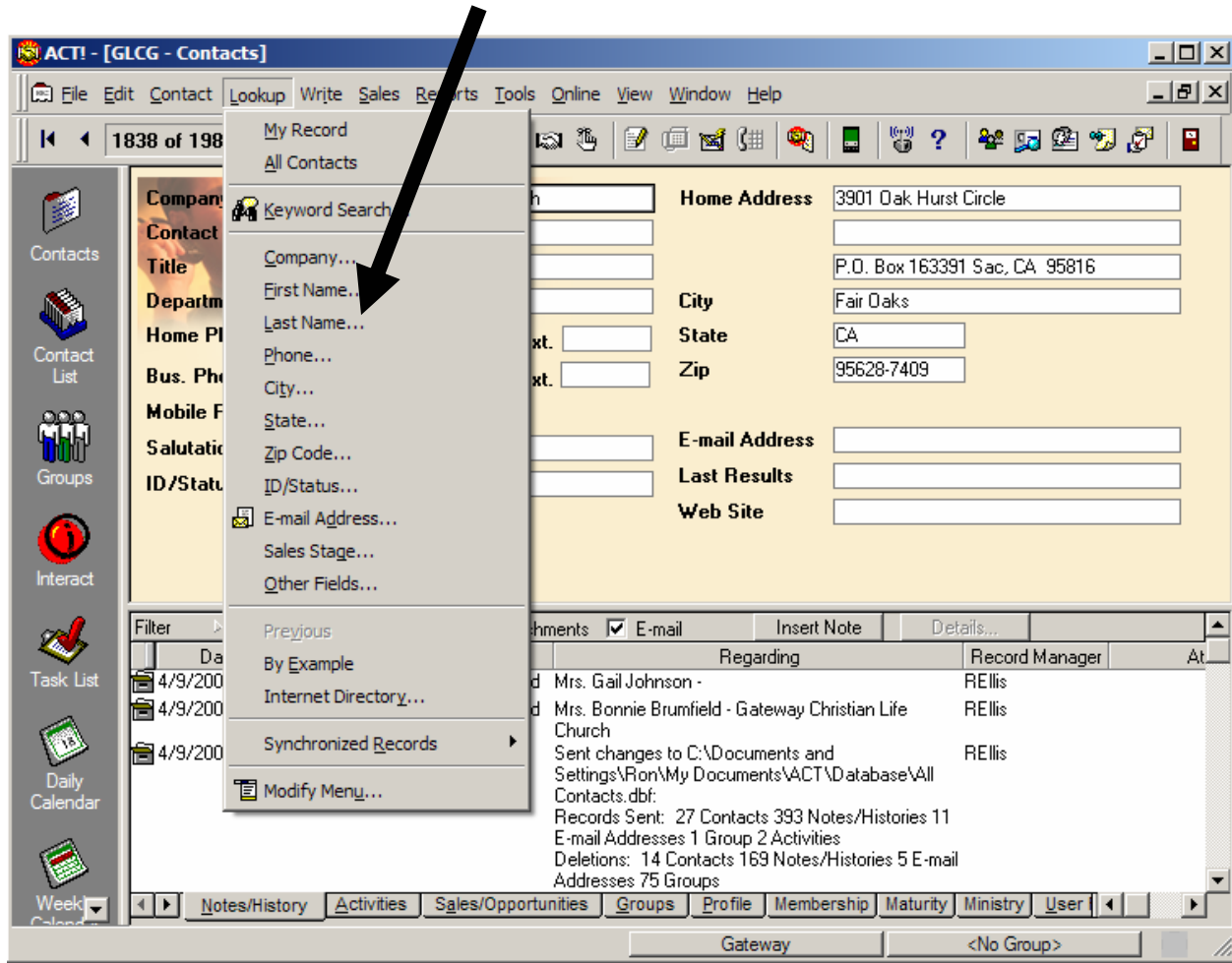
The screenshot shows the ACT! software interface with the following details:

- Window Title:** ACT! - [GLCG - Contacts]
- Menu Bar:** File, Edit, Contact, Lookup, Write, Sales, Reports, Tools, Online, View, Window, Help
- Toolbar:** Navigation and utility icons.
- Left Sidebar:** Contacts, Contact List, Groups, Interact, Task List, Daily Calendar, Week Calendar.
- Contact Record:**
  - Company:** Gateway Christian Life Church
  - Contact:** Ron Ellis
  - Title:** [Empty]
  - Department:** [Empty]
  - Home Phone:** 916-966-1962
  - Bus. Phone:** [Empty]
  - Mobile Phone:** [Empty]
  - Salutation:** Ron
  - ID/Status:** [Empty]
  - Home Address:** 3901 Oak Hurst Circle
  - City:** Fair Oaks
  - State:** CA
  - Zip:** 95628-7409
  - E-mail Address:** [Empty]
  - Web Site:** [Empty]
- Activity Log Table:**

Date	Time	Type	Regarding	Record Manager
4/9/2003	1:22 PM	Contact Deleted	Mrs. Gail Johnson -	REllis
4/9/2003	1:13 PM	Contact Deleted	Mrs. Bonnie Brumfield - Gateway Christian Life Church	REllis
4/9/2003	12:28 PM	Sent Sync	Sent changes to C:\Documents and 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	REllis
- Bottom Panel:** Filter, Notes, Histories, Attachments, E-mail, Insert Note, Details... Lookup: All Contacts

# Gateway

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...)



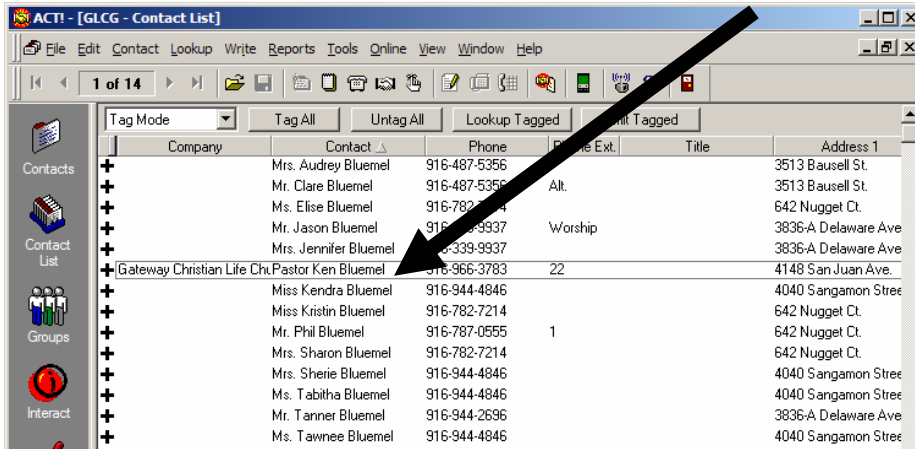
# Gateway

User Role	Action Steps
	5. Type in the selected value (e.g. the last name you're searching for and press [Enter] or click on [OK])

	6. Note the number of folks found with this criteria
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	7. Press the Contact List button at left to see a list of all those found
	8. Select from the list on screen the specific person you're looking for and click twice on their entry to move to their screen

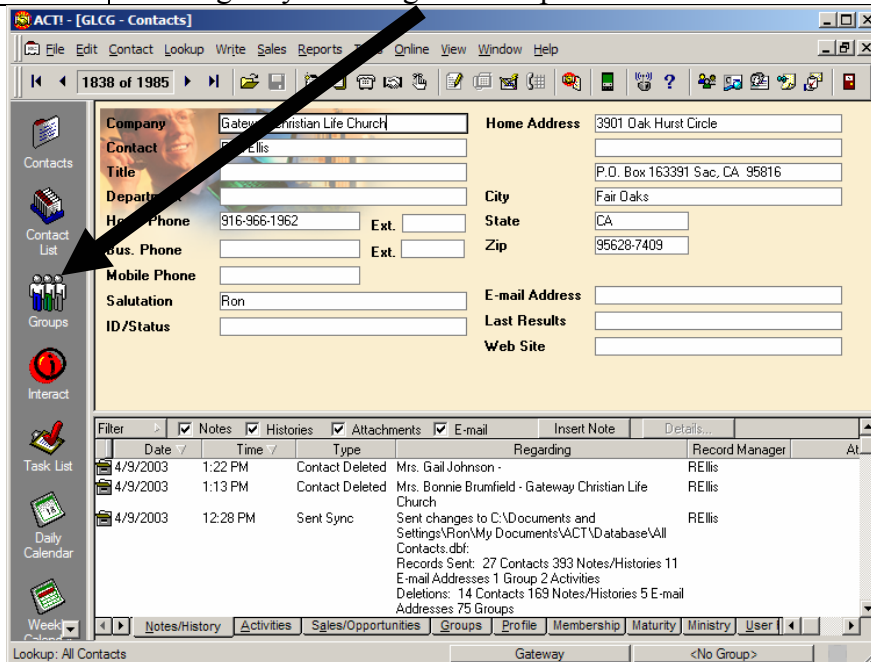
# Gateway



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

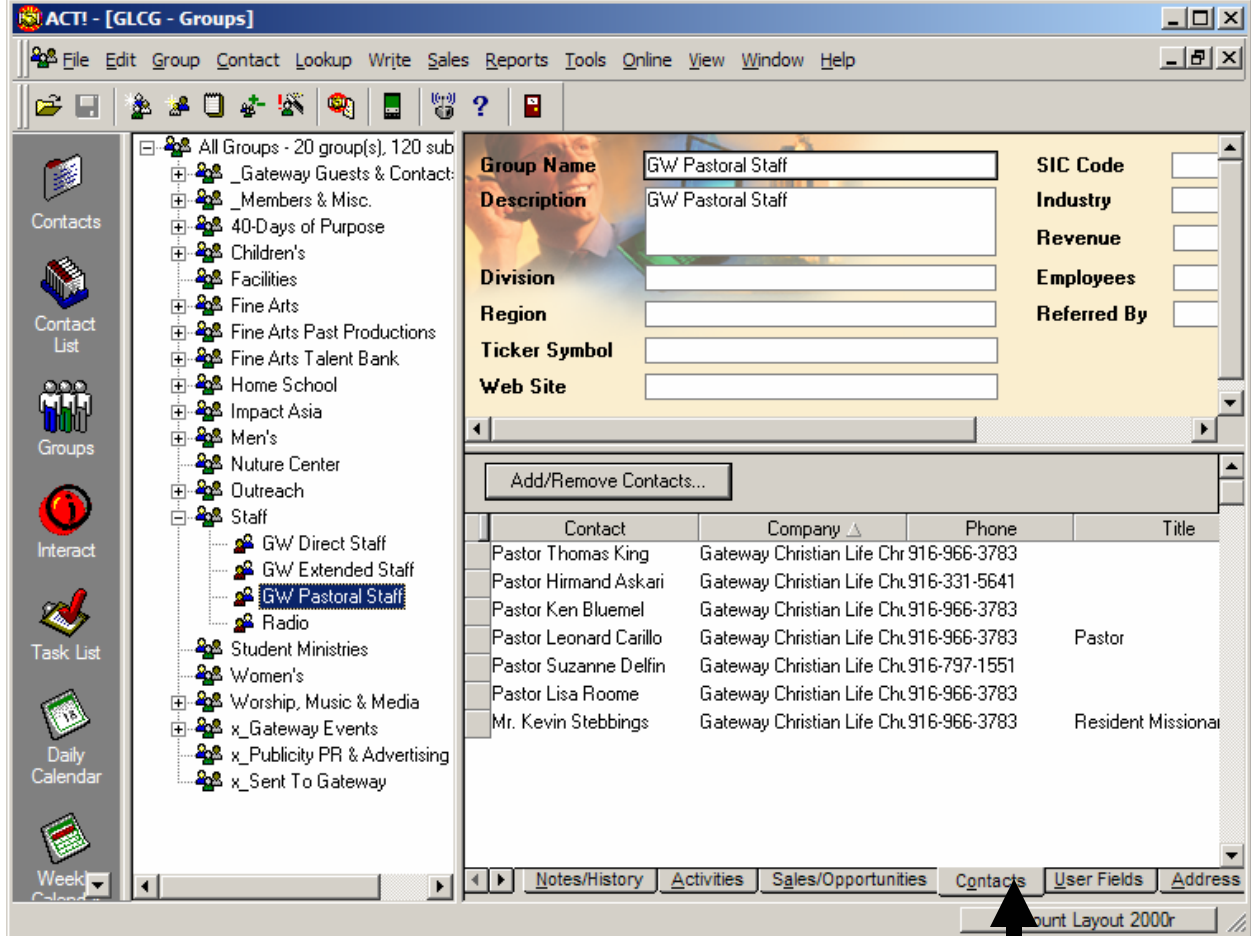
## WORKING WITH GROUPS

User Role	Action Steps
Normal ACT user	10. Begin by selecting the Groups button at left.



User Role	Action Steps
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11. Observe the Groups Screen as follows:



	12. Select the group of interest by clicking on its name. To unfold lower-level groups click on the plus ('+') sign to the left of the name as show above.
	13. Verify that the [Contacts] tab is being displayed

# Gateway

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

# Gateway

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'

The screenshot shows the ACT software interface for Gateway Christian Life Church. The main window displays contact information for Pastor Ken Bluemel, including his home and business phone numbers, email address (kbluemel@calis.com), and address (4148 San Juan Ave., Fair Oaks, CA). A sidebar on the left contains navigation buttons: Contacts, Contact List, Groups, Interact, Task List, Daily Calendar, and Week Calendar. A large black arrow points from the 'Action Steps' text above to the 'Contact List' button. Below the contact details is a table of recent email activity.

Date	Time	Type	Regarding	Record Manager
4/5/2003	9:05 AM	E-mail Sent	Subject: Small Groups in Homes	Mr. Ronald J. Ellis d:\Program f
4/5/2003	2:30 AM	E-mail Sent	Subject: 40-Days of Purpose at Gateway - Update on various items 4-4-03	Mr. Ronald J. Ellis d:\Program f
4/2/2003	11:05 AM	E-mail Sent	Subject: Getting folks to pay for their 40-Days books?	Mr. Ronald J. Ellis d:\Program f
4/2/2003	9:57 PM	E-mail Sent	Subject: 40-Days Offering Envelopes in books...	Mr. Ronald J. Ellis d:\Program f
3/31/2003	8:46 PM	E-mail Sent	Subject: Pastor Ken - Please verify that Saddleback DID NOT charge you...	Mr. Ronald J. Ellis d:\Program f
3/26/2003	11:39 PM	E-mail Sent	Subject: 40-Days LAUNCH TEAM * meeting reminder this Sun. 3:30-03 12:30pm	Mr. Ronald J. Ellis d:\Program f

	16. Sort or refine the selected group by selecting the [Contact List] button at left.
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# Gateway

User Role	Action Steps
	17. Review and sort or omit certain members of the selected group by clicking at the extreme left to

ACT! - [GLCG - Contact List]

File Edit Contact Lookup Write Reports Tools Online View Window Help

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Tag Mode Tag All Untag All Lookup Tagged Omit Tagged

Company	Contact	Phone	Phone Ext.	Title	Address 1
Gateway Christian Life Chr	Pastor Thomas King	916-966-3783	32		4148 San Juan Ave.
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 Leonard Carillo	916-966-3783	Worsh-71	Pastor	6420 Sagebrush Way
Gateway Christian Life Chu	Pastor Suzanne Delfin	916-797-1551	23		4632 Danvers Lane
Gateway Christian Life Chu	Pastor Lisa Roome	916-966-3783	30		4148 San Juan Ave.
Gateway Christian Life Chu	Mr. Kevin Stebbings	916-966-3783	26	Resident Missionary	c/o Gateway CLC - 41

	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])
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ACT! - [GLCG - Contact List]

File Edit Contact Lookup Write Reports Tools Online View Window Help

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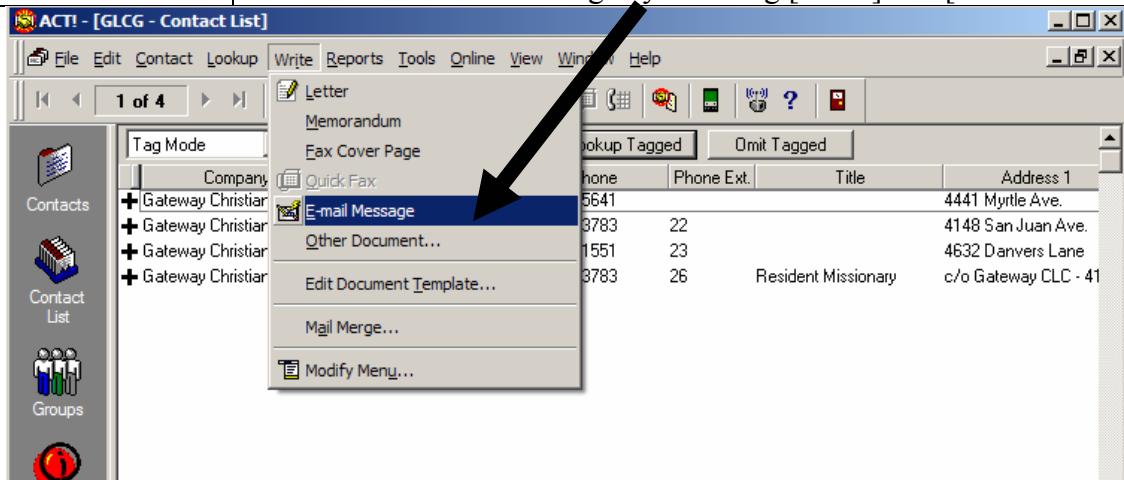
Tag Mode Tag All Untag All Lookup Tagged Omit Tagged

Company	Contact	Phone	Phone Ext.	Title	Address 1
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
Gateway Christian Life Chu	Mr. Kevin Stebbings	916-966-3783	26	Resident Missionary	c/o Gateway CLC - 41

## MAKING USE OF THE CURRENT LOOKUP – E-MAIL

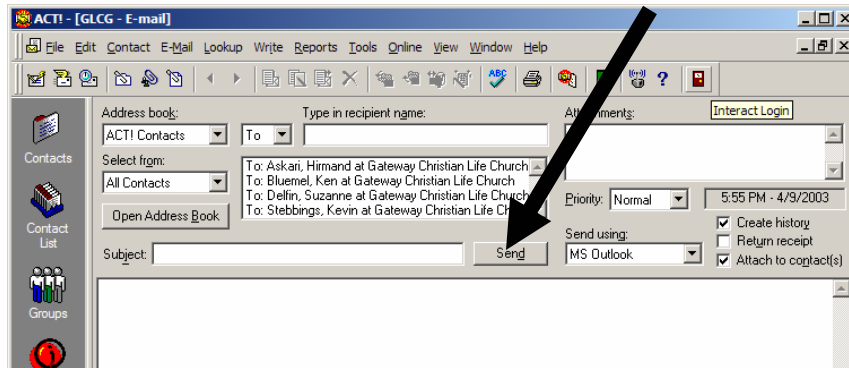
User Role	Action Steps
Normal ACT user	<p>19. Use a selected group or LookUp to do perform a variety of tasks including:</p> <ul style="list-style-type: none"> <li>• Printing Mailing Labels</li> <li>• Printing a Phone List</li> <li>• Sending and E-mail message</li> </ul> <p>For more advanced users:</p> <ul style="list-style-type: none"> <li>• Performing a mail-merge</li> <li>• Performing an E-mail merge</li> <li>•</li> </ul>

20. Send an E-mail message by selecting [Write] and [E-mail Message].



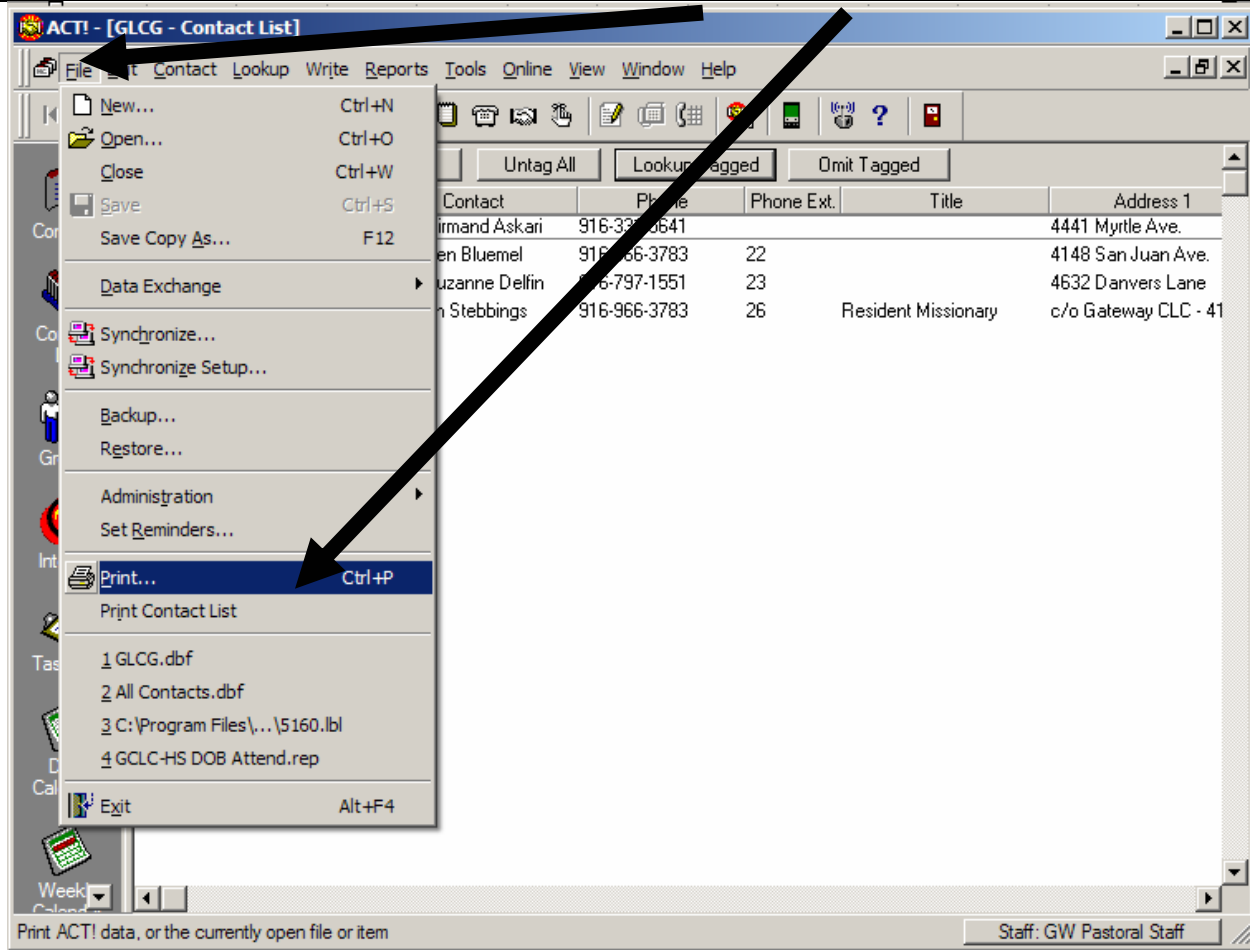
21. Use the resulting E-mail screen to send your pre-addressed message to the selected list. Type a subject and message and press [Send].  
*(Note: Pressing [Send] releases the message into outlook for actual transmission. The next time you open outlook you can open and examine the message in Outlook's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

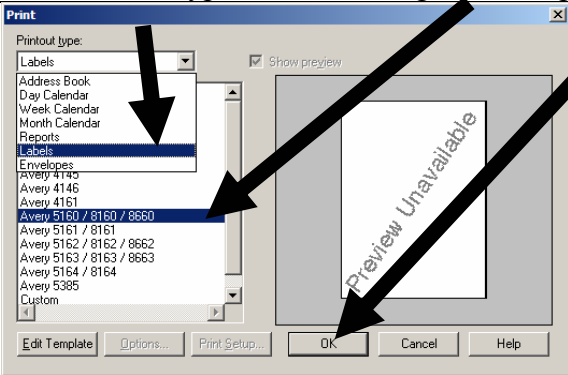
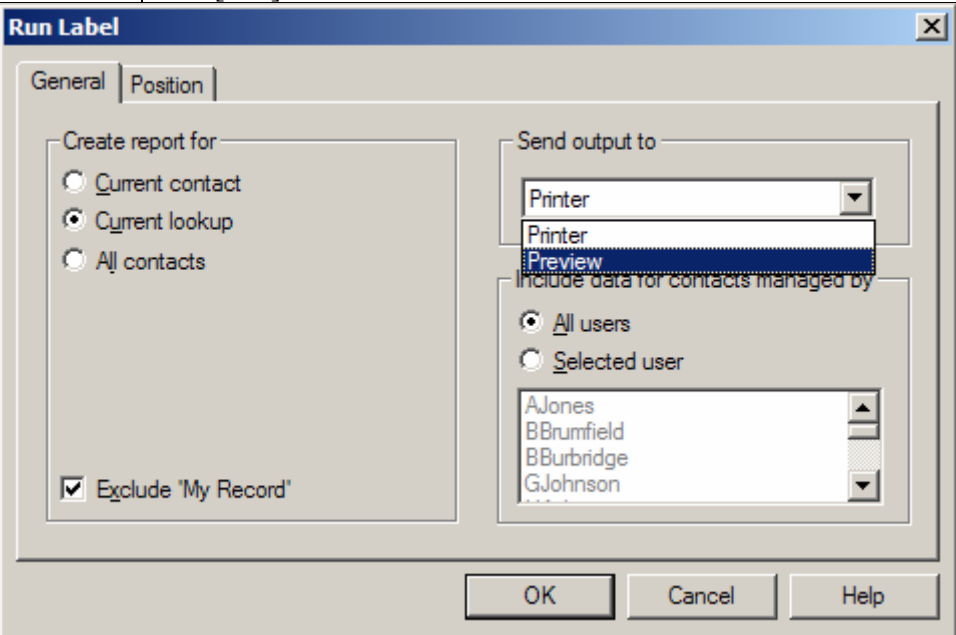
# Gateway



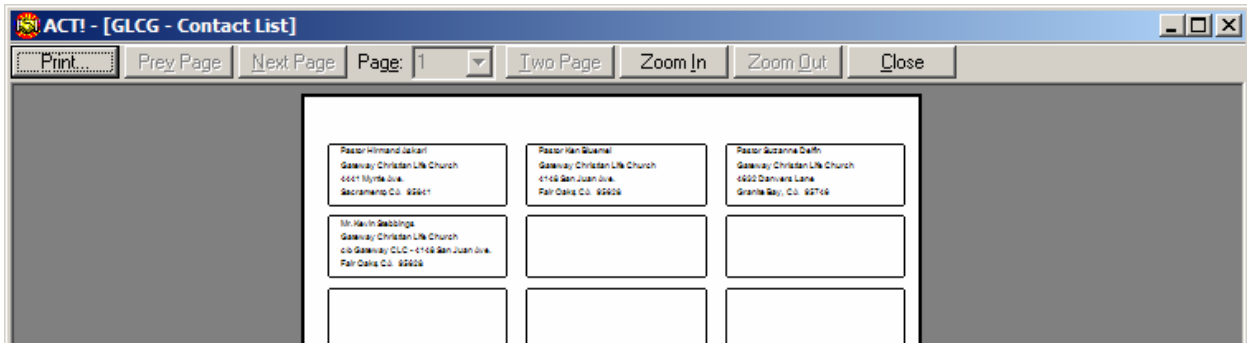
## MAKING USE OF THE CURRENT LOOKUP – LABELS

User Role	Action Steps
Normal ACT user	22. Print labels by selecting [File] and [Print] on the top menu.



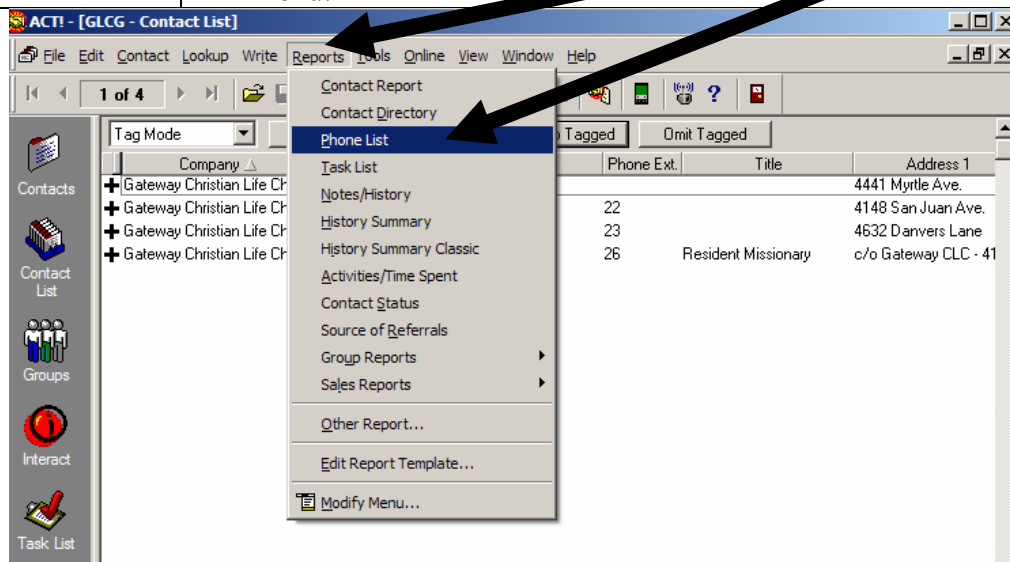
User Role	Action Steps
	<p>23. Use the following screen to select 'Print Type' 'Labels' and then indicate the type of labels being used and press [OK]</p>
	
	<p>24. Select 'Preview' in the 'Send output to' window as shows below. Verify that the source of data is the 'Current Lookup' and press the [OK] button.</p>
	
	<p>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 <b><u>ALREADY</u></b> loaded with labels to print.</p> <p>26. Choosing 'Printer' above will take you to the printer selection screen and send the output directly to the printer.</p>

# Gateway



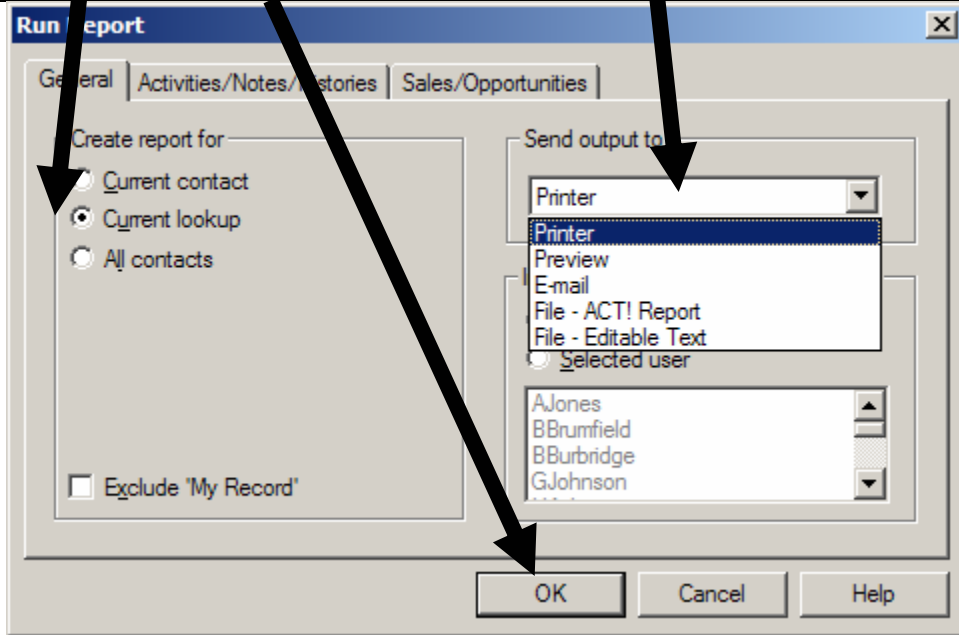
## MAKING USE OF THE CURRENT LOOKUP – PHONE LIST

User Role	Action Steps
Normal ACT user	27. Print a Phone List by selecting [Reports] and [Phone List] on the top menu.

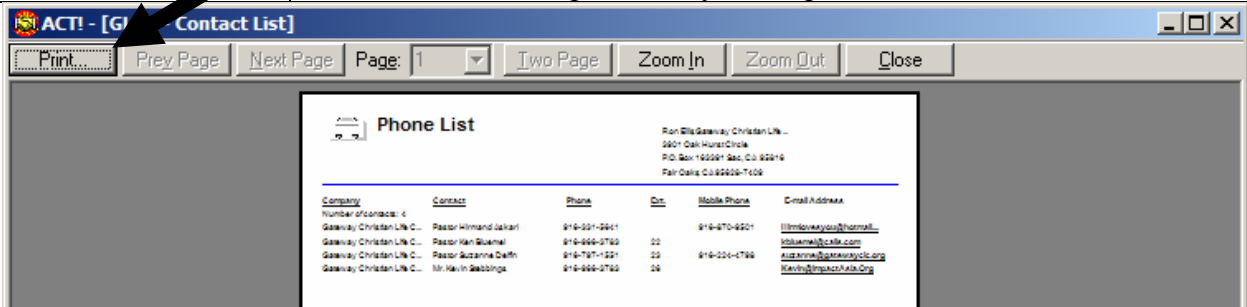


# Gateway

User Role	Action Steps
	28. Select 'Preview' in the 'Send output to' window as shows below. Verify that the source of data is the 'Current Lookup' and press the [OK] button.



	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 and send the output directly to the printer.



	31. Note above that there are several other options you can use with reports including: <ul style="list-style-type: none"> <li>• 'E-mail' to directly E-mail the resulting report as an attachment to an E-mail message, and</li> <li>• 'File – Editable Text' to create a report output file that is formatted in Rich Text Format ('.RTF') which can</li> </ul>
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be opened inside Microsoft Word. (This allows you to further enhance the report with a custom title, additional notes, etc.) **NOTE:** 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	<p>32. Use a selected contact to:</p> <ul style="list-style-type: none"> <li>• Begin typing a letter</li> <li>• Begin typing a Fax Cover Page</li> <li>• Begin typing a memo</li> <li>•</li> </ul> <p>By FIRST starting Microsoft Word and then bask inside ACT selecting [Write] and the appropriate choice.</p>

The screenshot shows the ACT! software interface with the 'Write' menu open. The contact record for 'kbluemel@calis.com' is displayed, with fields for Home Address (4148 San Juan Ave.), City (Fair Oaks), State (CA), Zip (95628), and E-mail Address (kbluemel@calis.com). The 'Write' menu options are: Letter, Memorandum, Fax Cover Page, Quick Fax, E-mail Message, Other Document..., Edit Document Template..., Mail Merge..., and Modify Menu... An arrow points to the 'Write' menu.

Filter	Date	Time	Type	Regarding	Record Manager	At
	4/5/2003	3:05 AM	E-mail Sent	Subject: Small Groups in Homes	Mr. Ronald J. Ellis	d:\Program f
	4/5/2003	2:33 AM	E-mail Sent	Subject: 40-Days of Purpose at Gateway - Update on various items 4-4-03	Mr. Ronald J. Ellis	d:\Program f
	4/2/2003	11:05 PM	E-mail Sent	Subject: Getting folks to pay for their 40-Days books?	Mr. Ronald J. Ellis	d:\Program f



User Role	Action Steps
	<p>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.</p> <p>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.</p>

### 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.
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	<p>36. Move to any application and press the [Paste] button or press [Ctrl] &amp; [V] to add the copied info:</p> <p style="text-align: center;">           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         </p>
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## WHAT ELSE?

User Role	Action Steps
Advanced Users	<p>37. ACT Can be used for a variety of more advanced purposes including:</p> <ul style="list-style-type: none"><li>• Mail Merge to plain E-Mail</li><li>• Mail Merge to HTML E-Mail (with added software, Mail Merge Mania)</li><li>• Mail Merge to Paper</li><li>• Mail Merge to Fax</li><li>• Standard Letters (<i>quickly produce Letter of Call to Ushers, etc.</i>)</li><li>• Export Data (<i>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.</i>)</li><li>• Perform data analysis (<i>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.</i>)</li></ul>