Contents

ACT! Tools is a shareware product created by The Claiborne Company. The registration fee is $25.00 in US funds. Site licenses fees will negotiated on an individual basis.

To register, please send a check to:

> The Claiborne Company
> 13077 St. Patricks Court
> Highland, MD   20777-9515

Overview

Installation

Using *ACT! Tools*

Acknowledgements

Registration

Questions

Overview

ACT! Tools is a collection of Word for Windows macros that provides easy access to your contact information in ACT! while using Microsoft Word for Windows. With *ACT! Tools*, you can:

- View and edit information on any ACT! contact.
- Search for an ACT! contact based on any of the primary ACT! fields or on a predefined query.
- Add a new ACT! contact from within Word.
- Instantly paste the contact address into the current document.
- Create a document with links to the current ACT! contact by simply pointing and clicking.
- Create a letter addressed to the current ACT! contact with the letter information automatically stored in your ACT! contact history.
- Automatically print a series of form letters for every contact in the current ACT! group. If desired, each form letter is automatically logged in each contact's history.
- Print an envelope addressed to the current ACT! contact.

Installation

ACT! Tools requires*:*

- Microsoft Windows 3.1 or Windows for Workgroups 3.11
- Symantec ACT! 2.0
- Microsoft Word for Windows 6.0
- A computer with enough memory and disk space to run all of the above at the same time

Related Topics:

Loading the Files

Customization

Loading the Files

ACT! Tools consists of three Word template files (ACTTOOLS.DOT, ACTLETTR.DOT, and ACTENV.DOT), a Windows Help file (ACTTOOLS.HLP), and a settings file (ACTTOOLS.INI).

To install the tools, first copy ACTLETTR.DOT, ACTENV.DOT, and ACTTOOLS.HLP to your default Word template directory (normally C:\WINWORD\TEMPLATE). Then copy ACTTOOLS.INI to your Windows directory (normally C:\WINDOWS)

The location of ACTTOOLS.DOT depends on how you want to use *ACT! Tools*. If you want *ACT! Tools* available all the time, copy ACTTOOLS.DOT to your Word startup directory (normally C:\WINWORD\STARTUP). This way, *ACT! Tools* will be loaded as a global template whenever you start Word. Alternately, you can copy ACTTOOLS.DOT to your default Word template directory.

If you install ACTTOOLS.DOT in your default Word template directory, you still must make it available as a global template when you want to use it. To do this perform the following steps.

1. Copy the template files to the directories described above.

2. Start Word.

3. Select File Templates… from the menu bar to display the Templates and Add-ins window, shown below.
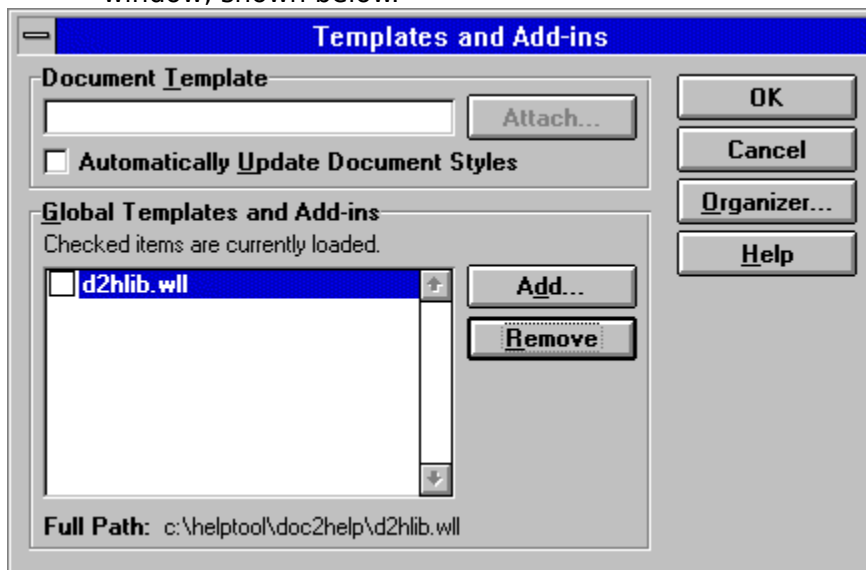
4. Select Add…to display the list of available template files. Select ACTTOOLS.DOT as shown below, and click on OK.
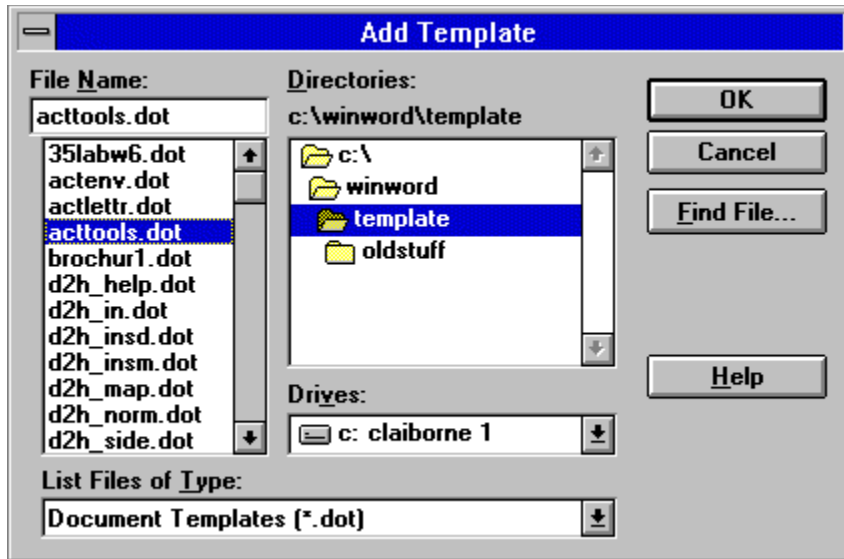
5. To "turn on" the *ACT! Tools* when you are using Word, repeat Step 3 and the click the box beside ACTTOOLS.DOT. You also can disable *ACT! Tools* in the same   manner.

6. When *ACT! Tools* is active, you will see the *ACT! Tools* toolbar (shown below) floating in your Word document. You can place this custom toolbar anywhere you want.
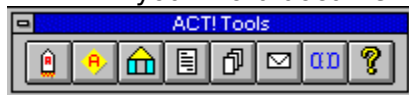
Customization

The *ACT! Tools* macros assume that you have a standard, single-user installation of Word for Windows and ACT!. Based on this assumption, the macros contain variables which point to specific directories. These variables are defined in ACTTOOLS.INI. If your installation is non-standard, you must modify ACTTOOLS.INI to conform to your particular installation. You can use any text editor to change the settings file. Use the table below as a guide.

Directory	Assumed Location	Setting Name
Help file	C:\WINWORD\TEMPLATE	Help Directory
ACT! executable	C:\ACTWIN2	EXE Directory
ACT! Queries	C:\ACTWIN2\QUERIES	Query Directory
Word templates	C:\WINWORD\TEMPLATE	USER-DOT-PATH (defined in WINWORD6.INI)

ACTLETTR.DOT and ACTENV.DOT are generic templates. You may want to modify them to accommodate your organization's correspondence style. Both files can be edited, but be sure that you do NOT delete any of the bookmarks in the templates. The *ACT! Tools* macros uses these bookmarks to locate where the ACT! information should be inserted.

ACT! Tools also assumes the following:

- You have defined one of the longer user fields in ACT! as a "Last Letter" field. The AutoNew macro in ACTLETTR initially uses the USER_9 field, but you could also use USER_7 or USER_8. Do not use any of the shorter fields - you need the extra length to store the letter filename and subject.

- You have checked the "history record" attribute for the above field, using the Edit Field Attributes command in ACT!. This ensures that every time the value in the field changes, a notation is made in your contact history file.

If these two assumptions are not true, you will have to alter variable "History Field" in ACTTOOLS.INI.

Using *ACT! Tools*

You can access the macros that comprise *ACT! Tools* from either the *ACT! Tools* Toolbar or from the Tools menu. In order for either to appear, however, ACT!TOOLS.DOT must be a global template. If this is not the case, see the previous installation instructions.

Related Topics:

Launch ACT!

ACT! in Word

Design ACT! Letter

Standard ACT! Letter

Print ACT! Form Letters

Print ACT! Envelope

Unlink ACT! Fields

ACT! Tools Help

🅰 Launch ACT!

All the *ACT! Tools* macros require that ACT! be running. If you try to use any of the macros and ACT! is not running, you get the message
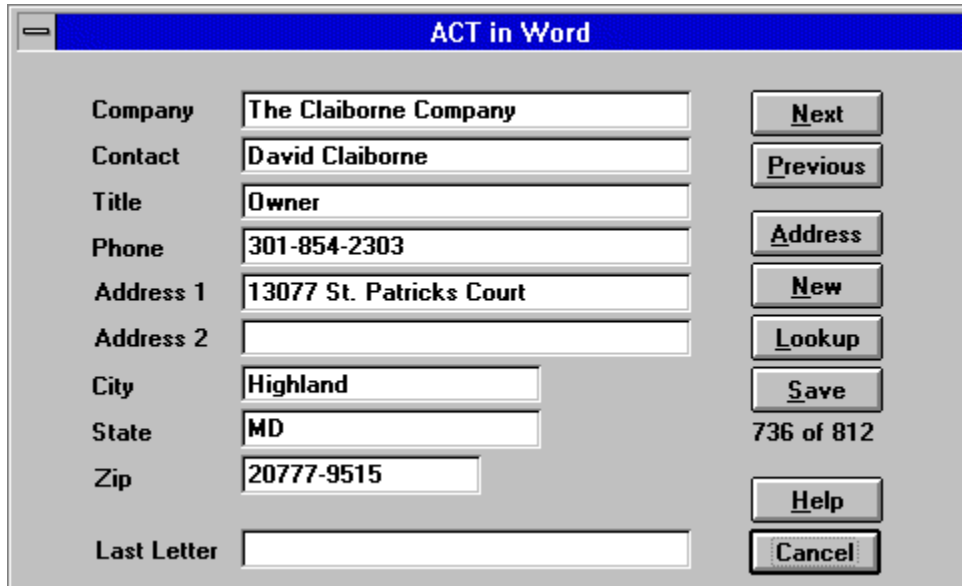

To launch ACT! (in a minimized mode), simply select 🅰 from the *ACT! Tools* toolbar or Launch ACT! from the Tools menu.

⬛ ACT! in Word

ACT! in Word is a abbreviated version of ACT! constructed in WordBasic. In a simple dialog box, you can:

- View and edit any contact in ACT!.
- Look up a specific contact or a group of contacts.
- Add a new contact.
- Paste address information into your current document.

To start ACT! in Word, click on ⬛ in the *ACT! Tools* toolbar or select ACT! in Word from the Tools menus. This displays the ACT in Word dialog box for your current ACT! contact, as shown below.

ACT in Word	
Company	The Claiborne Company
Contact	David Claiborne
Title	Owner
Phone	301-854-2303
Address 1	13077 St. Patricks Court
Address 2	
City	Highland
State	MD
Zip	20777-9515
Last Letter	

Buttons: Next, Previous, Address, New, Lookup, Save, Help, Cancel

736 of 812

Related Topics:

Next and Previous

Address

New

Lookup

Save

Cancel

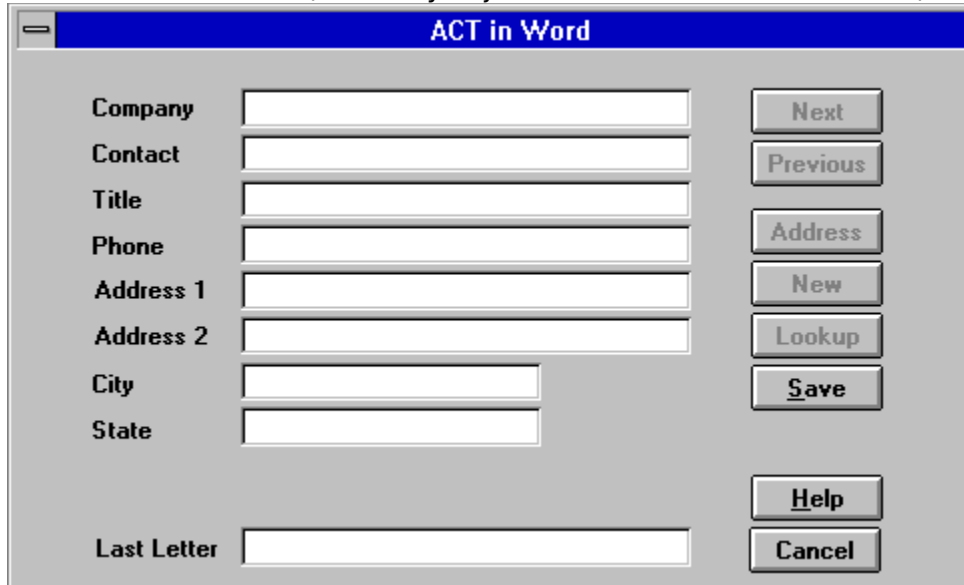# ACT in Word - Next and Previous

To move through the current ACT! group of contacts one contact at a time, select <u>N</u>ext or <u>P</u>revious.

ACT in Word - Address

To paste the address for the current contact into your current document (at the current cursor location), select Address. The paste operation automatically eliminates any blank fields in the contact information.

ACT in Word - New

To add a new contact (while still in Word), select <u>N</u>ew. This produces a blank contact screen as shown below. When all the information is correct, select <u>S</u>ave. To abandon the new information, select Cancel or press the <Esc> key. In both cases, you are returned to listing of the current contact (the one you just entered if decided to save it).
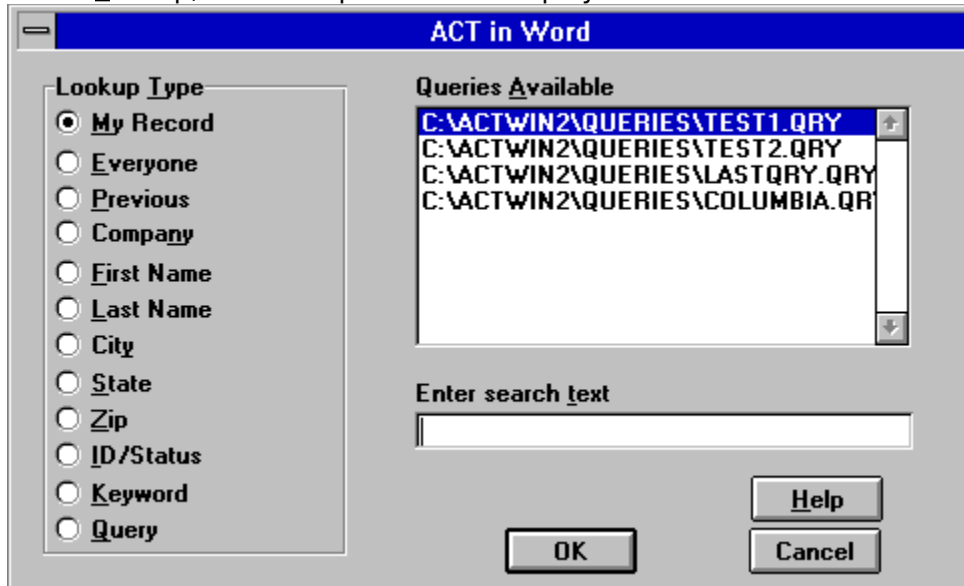
ACT in Word - Lookup

The lookup function allows you to quickly find any of your contacts by searching on any of the primary ACT! data fields. Alternately you can select a predefined ACT! query. When you select Lookup, the Lookup window is displayed as shown below.

The lookup type buttons correspond to the normal ACT! lookups. The first three, My Record, Everyone, and Previous, require no search text. The remaining buttons (with the exception of Query), require you to enter at least one character of text in the search text field before starting the lookup. To initiate the lookup, select OK. The results of the search becomes your current ACT! group of contacts. To abandon the lookup, select Cancel.

The Query search is somewhat different. When selected, it initiates a predefined (in ACT!) query that may combine one or more ACT! fields. ACT! normally stores queries you create in the subdirectory C:\ACTWIN2\QUERIES. To use one of these queries, highlight the query is the displayed list box, select the Query button, and then select OK. Be aware that these types of queries can take a significant amount of time to process if you have a large ACT! database.

ACT in Word - Save

When a contact is displayed, you can edit any of the displayed information. To save the changes, select Save.

ACT in Word - Cancel

To end the ACT! in Word dialog, select Cancel or press the <Esc> key. Even though the display is erased, the current contact and current group in ACT! will remain the same for further use in Word.

⬆ Design ACT! Letter

To link a Word document to the current ACT! contact, you must insert DDEAuto fields into your Word document using the proper field name for the ACT! information. To simplify this process, *ACT! Tools* contains the Design ACT! Letter macro. It lets you insert any of the primary ACT! fields anywhere in your current document with three clicks. The steps are as follows:

1. Position your cursor in your document where you want the ACT! information to appear.

2. Select ⬆ in the *ACT! Tools* toolbar (Click One) or Design ACT! Letter from the Tools menu. This displays a list of ACT! fields as shown below.

Insert an ACT! field

Act! Fields

- ⦿ Company
- ○ Contact
- ○ First Name Only
- ○ Last Name Only
- ○ Dear
- ○ Title
- ○ Address1

- ○ Address2
- ○ Address3
- ○ City
- ○ State
- ○ ZIP Code
- ○ City, State ZIP
- ○ Date

[OK]   [Help]   [Cancel]

3. Select the field you want inserted (Click Two).

4. Select OK (Click Three). The DDEAuto field with a link to the designated ACT! field is automatically inserted in your document. The information for the current ACT! contact is displayed.

5. Repeat the steps to insert as many fields as you want.

🗐 Standard ACT! Letter

The standard ACT! letter is based on the template ACTLETTR.DOT. This template file contains an AUTONEW macro that constructs the letter, inserting the information from the current ACT! contact. In addition, the macro uses an automatic naming convention for letters based on the name of the contact to construct a suggested file name for the new document. Finally, when the new letter is saved, you have the option of recording information on the letter in your ACT! contact history.

The steps in creating the letter are as follows:

1. To start the process, select 🗐 from the *ACT! Tools* toolbar or Standard ACT! Letter from the Tools menu. After the initial information is completed, the macro prompts you for a subject of the letter as shown below.
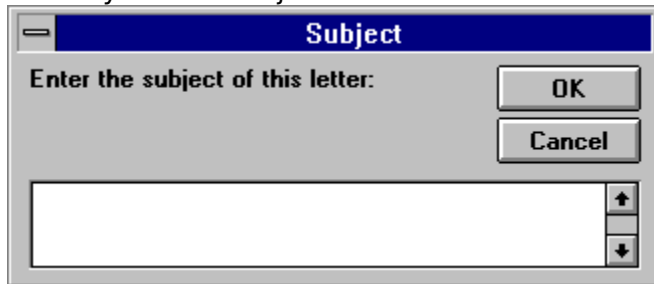
2. Enter a subject and select OK. If you select Cancel, the macro is halted. You will have a letter created, but with no automatic file name generation or entry in the ACT! contact history.

3. After you provide the subject, the macro creates a suggested file name and prompts you to approve, as shown below. Select Yes or No. If you select No, you must save the file yourself.
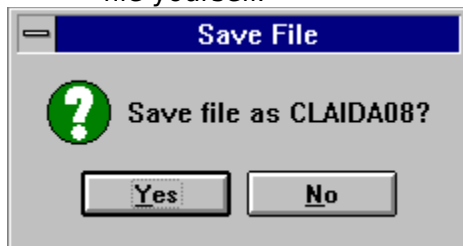
4. Finally, you are asked if you want to record the letter information in ACT!'s contact history. Select Yes or No. If you select Yes, the file name and subject of the letter are placed in the designated ACT! field.

5. At this point in time, all links to the current ACT! contact are removed. You can edit the letter and add to the body as needed.

🗗 Print ACT! Form Letters

ACT! Tools gives you the ability to print a form letter for the current group in ACT!. The steps are as follows:

1. Create the form letter (or actually any type of document), inserting ACT! fields where appropriate. Use 🏠 to quickly insert ACT! fields. Save the letter before proceeding.

2. Select a group in ACT!. If you have a predefined query, you can select your group through 🔶 (ACT! in Word). Otherwise, you have to create the group in ACT! directly.

3. Select 🗗 from the *ACT! Tools* toolbar or Print ACT! Form Letters from the Tools menu. A prompt first asks if you want to record the form letter information in each contact's history. Select <u>Y</u>es or <u>N</u>o.

4. Each contact's information is loaded in turn, and the document is printed. A progress report is shown at the bottom of the Word window. You can press the <Esc> key to cancel at any time during the printing.

✉ Print ACT! Envelope

To quickly print an envelope for the current contact, select ✉ from the *ACT! Tools* toolbar or Print ACT! Envelope from the Tools menu. An envelope is immediately printed using the envelope definition in ACTENV.DOT.

✉ Unlink ACT! Fields

When you create a document with links to ACT!, every time the contact changes in ACT!, the document will change. Also, ACT! must be running in order to load the document. Often, once the document is created, you no longer need the ACT! links. The UnlinkACT macro first updates all ACT! links in the current document, and then removes them all in one easy step.

To use this macro, select ⊞ from the *ACT! Tools* toolbar or Unlink ACT! Fields from the Tools menu. The operation is fully automatic with no options.

✉ ACT! Tools Help

To access *ACT! Tools* Help, select ❓ from the ACT! Tools toolbar or ACT! Tools from the Help menu.

Acknowledgements

ACT! is a registered trademark of Symantec Corporation.

Word for Windows is a registered trademark of Microsoft Corporation.

The ACTLETTR.DOT template is based on a template originally created by Michael S. Hyatt.

The idea for a WordBasic version of ACT! originated with Greg Harrelson of Symantec Corporation.

Registration

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Registered users will be provided with the latest copy of *ACT! Tools* and a telephone support number.

Questions

If you have questions about *ACT! Tools*, please send them to:

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or via the Internet (70373.334@compuserve.com).