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Spring Clean Your Database

Looking to get more out of Act! this spring? Here are four easy steps to clean out your database by setting some data entry standards.

1) Toss the empties
Empty fields just tempt users to stow away data that doesn't seem to have a home. Then the data, sitting in a mislabeled field, is report resistant. It isn't organized, so it won't come up in a field search and can't be pulled into a report for analysis.

2) House the homeless
Look around your database. Just sift through some entries. Do you see a pattern in the data that is being tossed into "catch-all" fields? Create new fields to accommodate data you want to collect regularly, and move the data into the properly labeled fields where it belongs.

3) Consult the staff
You may think you know what needs to go and what should stay, but maybe your staff thinks differently. Have a quick meeting about your current Act! usage - what people are using, what they aren't, and what they wish they could do differently. You should decide who is responsible for filling out which fields, and set up a standard by which people assign tasks to each other to facilitate smooth workflow.

4) Idiot-proof it
Where possible, consider setting up activity series to encourage the steps in a workflow plan. Every time someone adds a new prospect, does that mean your salesperson should make a call? Or every time a support contract has an expiration date, should a renewal request call be made 8 months later? Set it up so Act! asks you to schedule these things.

Need help customizing your database or setting up an activity series? **Contact us!**

Act! Feature of the Month: Act! Mobile

Did you know that Act! Mobile is included with your purchase of Act! Premium at no additional charge? With Act! Mobile you can stay connected to your business by accessing key Act! details from your favorite supported device. Enjoy the convenience of using familiar Act! functionality to instantly view and capture important customer details in real time. All the robust functionality you're accustomed to, now with easier access and immediate updates.

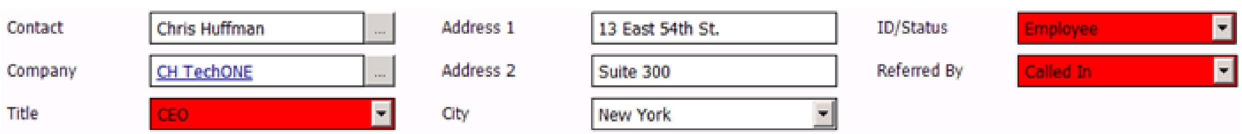
- Travel light and stay connected with real-time, mobile access to your Act! Premium contact,

calendar, and opportunity details from your iPhone®, iPad® or Android™ device.
• Easily view, add, and edit Act! contact details, notes, history, activities, as well as groups and companies for a powerful sales advantage.
• Focus your energy on high priority opportunities by filtering your list view based on date, status, process, and stage—like commitment to buy.
• Conduct a global search on any text field, even attachments, to find and open precisely what you need, when you need it—fast.
• Boost your effectiveness with a sleek interface that features Quick Actions and follows familiar Act! functionality. Personalize your layouts and enjoy a split screen tablet view for easy scrolling and viewing.
• Keep everyone up-to-date and on the same page since workgroups have secured, shared access to the most recent Act! details.

Contact us for more details or to purchase Act!.
*Already have Act! Premium? **Click here** for the Act! Mobile Quick Reference Card.*

Quick Tip: Color Code Your Database Fields

Are there certain fields in your database that should always be filled out? *Try changing the field background color to remind users that these fields are mandatory.*



1. In Act!, go to the Tools menu and choose Design Layouts. Select the type of layout to change. (If you aren't familiar with how to use the Layout Designer, back up your database first!)

2. Select the fields you would like to change. Holding down the Ctrl key will let you select multiple fields.

3. Once you have the fields selected, click on the Background Color button and select the color you prefer.

4. Save the layout and it will automatically be reflected the next time a contact record is opened.

Deal of the Month

Have an older version of Act!? *A multitude of product innovations, feature enhancements, and business-critical services have been introduced since your version.* Check out the Release Enhancements Guide to see what you could be doing with Act! v17 to propel your sales and marketing success.

Upgrade to Act! v17 this month, and receive one year of software updates and phone support from Act! included in your upgrade price.

Contact us for more details or to upgrade.