ACT!™

Custom Curriculum Option from MIS:

Designed for:
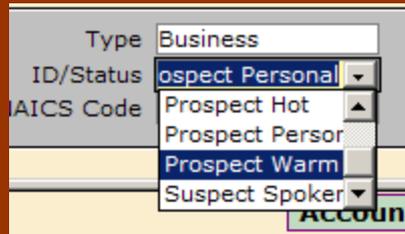
Sample Company

Data Entry

- The quickest and easiest way to get data into Act is to tap the [Insert] Key. This will create a

  blank record. (Fill out at least the required fields as Act will not let you out till you do)
  - POINTER: The benefits of using the <INSERT> are speed and convenience. You don't have to take your hand off of the keyboard to use it (unlike the mouse)

- Once you have filled out a field, you should use the [Tab] key to move forward to the next field.

(Look at the <TAB> key and noticed that it has bi-directional arrows. To go backwards, **hold** down the [SHIFT] key while tapping the <TAB> key and it will go in the reverse direction. Learn this and you will be faster at data entry then your mouse only colleagues)

- **Drop Downs**: You will encounter these throughout the Act Screen. They look like this (See the small diagram at the bottom of this slide for a graphic of a dropdown) and can work in one of 2 ways. If you just type into the field that has a drop down, it will autofill (meaning – if you type in the letters 'pre', it would complete the word as 'President')
  1. You can also click the on the dropdown with your mouse to open it (See next page for data entry screen)

2

This is the data entry screen. The following slides will clarify how to use these according to the Regent method for Act usage.

Bottom Half of the Screen

The rest of the fields, you can fill out gradually as you get the information.

Calling Officer: determines who the record belongs to. Very important to update this right away.

Account Information

Office
Boca Raton

Calling Officer(s)
Advisory Board Member,Carolyn Cruz and Giselle

Previous Banking Relationsl

Date Acct Opened
Account Number
Type of Account
Opening Balance
Additional Balance
Loan Balance
Source of Funds
Account Opened By

Layout Edit Date 6/13/2006

Notes/History | Activities | Sales/Opportunities | Groups | Acct Info | Alt Contacts | Events | Status

Groups : Defined

1. Definition:
    1. A group is similar to a lookup in that will display a set of records limited by some type of criteria.
    2. Groups are different then lookups in that they have a unique name that allows us to conveniently bring up a specific record set, even if it is complex.
    3. Groups are more permanent then lookups in that lookups disappear as soon as we do another lookup (Groups must be deliberately deleted to get rid of them)
    4. Static Groups: can hold records that have no lookup to relate them (such as Favorite Customers)
    5. Dynamic Groups: These are rule based groups that have complex rules to fill them (Such as All customers in WPB who are either Business or Community) These will be done for you.