

**Volume 4**  
**Issue 1**  
**Mar 2007**

# i n f o Newsletter

**For ACT! by Sage**

## Headline News

### New Industry Solution

On December 4, 2006, Sage Software announced the acquisition of intellectual property from VerticalFalls Software, Inc. The software will be used to build a compliance and document management solution for the financial services industry based on ACT! by Sage.



## The Power Of ACT! by Sage Groups

**M**ost companies initially purchase ACT! by Sage as a feature-rich, affordable, and easy-to-use contact management system. It's a great tool for sales teams to use to manage their prospects and set follow-up reminders.

Are you using all the power that ACT! has to offer? In this article, we'll show you how you can maximize efficiency and leverage your contact data through the creative use of ACT! Groups. It can help with a range of activities, from targeted marketing to tracking support call status.

### How Groups Work

Simply stated, Groups allow you to organize your contacts according to data that they share, such as a ZIP code range or assigned salesperson. For example, you can set up a group for each of your salespeople. Using Groups, each salesperson's searches are faster and easier because they're searching from a list containing only the customers they manage.

Groups gives you a way to quickly find the information you need to effectively manage your contacts—even with a very large database.

In addition to Groups, you also can create Subgroups from Groups. For example, a group

might consist of all the customers or prospects in a particular state, and a subgroup the cities or counties within the state.

Groups can be even more powerful if you base them on user-defined fields (UDFs) you have added to your database. You may want to add a field to record a prospect's industry. If you are a service-based organization you may want

to track the services a Contact has purchased. If you have annual contracts or subscriptions with your contacts, you may want to add a UDF for Expiration Date so you can follow-up when a contract is due for renewal. Once these user-defined fields have been created and populated, you can build



The Groups function can help your team be more efficient in their sales, marketing, and customer service and support activities.

Groups based on them. Let's learn how.

### Creating Groups

The groups you create may be either Static or Dynamic. A Static Group will not change unless you manually add or subtract members. With a Dynamic Group, ACT! will read the criteria for the group and populate the list according to the contacts that currently match the criteria for that Group. So, the results may be different each time you access it. Once a Group has been created, it becomes available for use from the navigation

4555 Mansell Road  
Suite 300  
Alpharetta, GA 30022

(866) 460-6927 toll free  
(770) 521-4450 fax

Email: [sales@contactactivation.com](mailto:sales@contactactivation.com)  
Web site: [www.ACTorbit.com](http://www.ACTorbit.com)



**A Service of Contactivation**

# The Power Of ACT! Groups CONTINUED

bar. There are three ways to create Groups, let's learn more.

## Create A Group From A Lookup

The simplest way to create a Group, one that you might want to make available to everyone who uses the system, is to create it from a Lookup. Put your selection values into your lookup, and when it returns the list of contacts, turn it into a Group. From the Lookup menu, point to Groups, and then click *Save Lookup as Group*. A Group Detail view appears. Simply type in a unique Name and Description for the group. Make the name and description one you can remember the next time you want to use it.

## Manually Add Contacts To A Group

To manually add contacts to a static Group you access the Create Group function, give the Group a name, and choose Contacts to be added to the Group, one by one. This is useful if you do not have any one field that can be used to automatically generate the Group, or for use by staff not familiar with lookups or creating queries.

## Create A Group With A Query

You can automatically add members to a Group or Subgroup by creating a query. Members added this way are dynamic; they must continue to meet the criteria in the query to remain members. You can have multiple *and/or* criteria in the query. For example, you might want to create a group containing everyone who purchased *both* product A and product B, or for everyone who purchased either product A or product B. The power of a dynamic Group like this is that as new customers purchase these services, they will be automatically added to the Group, and be included the next time you use the Group.

## Working With Groups

How can you use the Groups you've created? Let's take a look at the potential for Groups within three functional areas: sales, marketing, and customer service or support.

### For Sales Activities

Do you periodically run sales promotions? Chances are you're often brainstorming to find

a way to make promotions more effective. By creating user-defined fields for each promotion, and flagging the contact record if they purchased during the promotion, you can use a Group to determine the success of that campaign and what works best for your company.

Customers who will provide recommendations of your products are like gold. If you place a Reference field in your database to track these customers, the sales team can flag the customer during their standard follow-up activities. Then in the future, if you need a reference to close a new deal, you simply use your Group function to find customers recommending the product.

### For Marketing Activities

Marketing is an area with great potential for the use of Groups. Here are just a few ideas.

If you purchase mailing lists and import them into ACT!, you'll have basic information but of course none of your user-defined fields will be populated. To remedy this you may assign a staff member the project of researching the company to add the additional data you track, such as Industry. By creating a Group specifying all records in which the Industry field is blank, you have a dynamic list to work from. Once the required information has been populated, the contact disappears from the Group.

Perhaps you have an e-mail marketing tool that generates a hot list of people who have clicked through the e-mail to your information page. You can flag these customers with a user-defined field and create a group for sales follow up.

Some companies have customer hierarchies. Here's an example using magazine publishing. Ad space is purchased for individual customers, but the purchaser is the advertising agency. A group could consist of all customers using a particular ad agency. Thus, with one call to the ad agency, multiple ads could be sold.

### For Support Or Service Activities

If ACT! is used to track support or service calls, you might choose to build a user-defined field showing the status. The values might be *O* for

Open, *E* for Escalated, or *C* for closed. Then you can simply create Groups showing all your open and escalated support issues. Another useful application might be to track and analyze Customer Issues. Your user-defined field could have values ranging from Damaged in Shipping to Manufacturing Defect. Groups could then show you how many customers experienced each issue, allowing you to take action to prevent future occurrences.

The creative use of Groups, especially when combined with user-defined fields, can make ACT! an extremely powerful tool for managing and growing your business. By now the ideas should be flowing for ways to use Groups in your company.

Creating more sophisticated Groups requires an understanding of the structure of the ACT! database and standard Boolean Logic, and isn't for everybody. However, it only takes one person to be able to write queries and then they can be used by everyone in the organization. Give us a call to help you build the user-defined fields and Groups you need. ★

## Tips & Tricks

### Setting the Size of User-Defined Fields

When new fields are added to ACT!, the default size is 50 characters. Adding lots of user-defined fields at this size enlarges your database unnecessarily and can adversely affect performance. When creating a field, determine how big it really needs to be. To change the field size, choose the Edit menu from the contact screen in ACT!, then click the Define Fields option to open the dialog box. Select the field in the left column and the attributes for that field will show in the appropriate boxes. Revise the value in the Number of Characters field to the maximum you will need.

Note: This activity should only be performed by a system administrator when the database is locked. Be sure to do this when all users are logged off. ★