

## Mondolessons for ACT! – Supplemental Notes

### Creating & Managing Company Records

#### Objective:

After this lesson, the learner will be able to:

- Define a company record in Act!
- Explain the workflow of how ACT! connects contacts to companies.
- Create a company record in ACT!
- Link multiple contacts to a company record
- Create contact lookups from a company record
- Employ the Lookup Company record feature
- Attach documents, notes and history to a company record
- Demonstrate how company records attach multiple contacts' history, notes, activities and opportunities with a comprehensive view
- Operate the Company List View
- Update linked contacts' data such as addresses, website and ID/Status
- Changing which fields become linked from company records to contact records
- Analyze a company's history using a report
- Deleting Company records

#### Conditions for Success:

ACT! 2008+ has been installed

Learner knows how to enter new contacts into ACT!

Learner knows how to enter notes or history into ACT!

Learner knows how to use the contact list view in ACT!

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### Company Record Definition

A *company* is a record type that lets you track multiple contacts within a company

Supposes your company views its clients 'account-centric' rather than 'contact-centric', the company record feature in ACT! helps you manage multiple relationships within one organization.

For example, you may work with multiple people at IBM. In ACT!, you create a unique contact record for each person you communicate with at IBM. The challenge is the sales manager or account manager wants to know with one click, "What's going on at IBM?". The company record solves this problem by allowing you to link all the contacts at IBM together. We'll show you how ACT! helps you manage this process and allows you to continue to manage the relationships with a minimal number of keystrokes.

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ACT! works along these principles

1. You meet a new contact at a new organization
2. You meet a second contact at the same organization
3. ACT! believes you will start creating company records

### Case #1

You have entered three contacts at the same organization and you want to make a company record and link them together. Here is the first record in figure 1.

The screenshot displays the ACT! by Sage Premium software interface. The title bar reads "ACT! by Sage Premium - act10demo\_lessons". The menu bar includes File, Edit, View, Lookup, Contacts, Groups, Companies, Schedule, Write, Reports, Tools, Accounting Link, and Help. The toolbar shows various icons for navigation and data management. The main window is titled "Contact Detail" and shows the following information:

- Company:** Burpelson Think Tank
- Contact:** Lionel Mandrake
- Salutation:** Lionel
- Title:** VP Operations Europe
- Department:**
- Phone:** 202-569-3400
- Mobile:**
- Fax:** 202-569-3415
- ID/Status:** Prospect
- Referred By:**
- Address:** 17 Q St NW
- City:** Washington
- State:** DC
- ZIP Code:** 2001-1103
- Country:** United States
- Web Site:** [www.burpelson.com](http://www.burpelson.com)
- E-mail:** [mandrake@burpelson.com](mailto:mandrake@burpelson.com)

Below the contact details is a tabbed interface with tabs for Notes, History, Activities, Opportunities, Groups/Companies, Secondary Contacts, Documents, Contact Info, User Fields, Home Address, Accounting Link, and Warranty Card. The "History" tab is selected, showing a list of activities with columns for Date, Time, Result, Regarding & Details, Record Manager, and Group/Company.

Date	Time	Result	Regarding & Details	Record Manager	Group/Company
5/20/2007	3:58 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Presentation 0%	Chris Huffman	
5/20/2007	3:58 PM	Opportunity Lost	New Opportunity \$4,000.00 Closed - Lost Friday, June 20, 2008 12:00:00 AM	Chris Huffman	
5/20/2007	3:55 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Needs Assessment 25%	Chris Huffman	
5/20/2007	3:53 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Commitment to Buy 100%	Chris Huffman	
5/20/2007	3:53 PM	Opportunity Won	New Opportunity \$2,000.00 Closed - Won Friday, November 30, 2007 12:00:00 AM	Chris Huffman	
5/20/2007	3:52 PM	New Opportunity	7/28/2007 - ACT! Sales Cycle Sales Fulfillment 100%	Chris Huffman	
5/20/2007	3:52 PM	Opportunity Won	7/28/2007 \$24,000.00 Closed - Won Sunday, May 20, 2007 12:00:00 AM	Chris Huffman	
6/25/2006	5:11 PM	New Opportunity	New Opportunity - Sales Cycle Initial Communication 10%	Chris Huffman	

Figure 1

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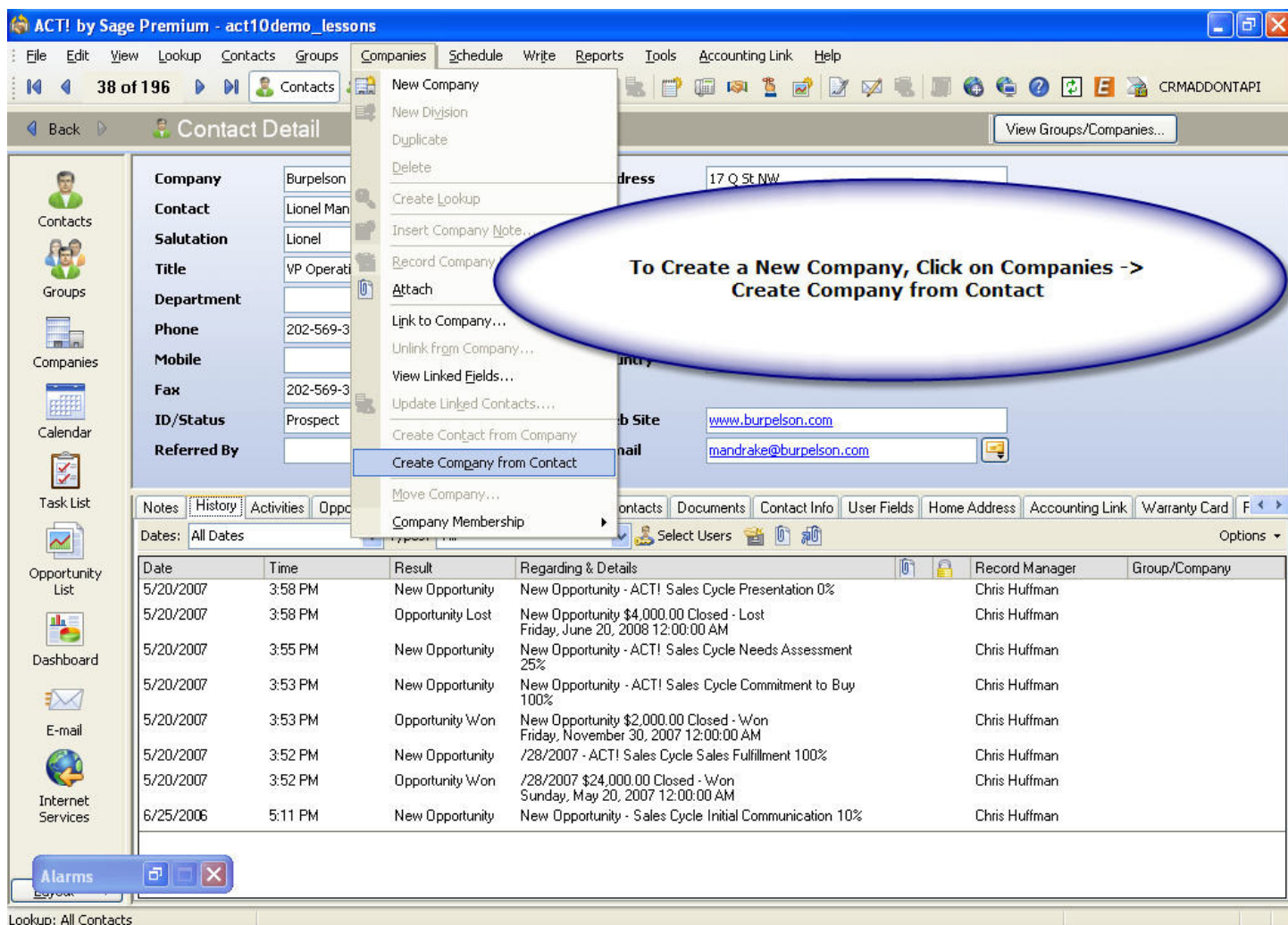


Figure 2

Figure 2 demonstrates you to create a new company record from an existing contact.

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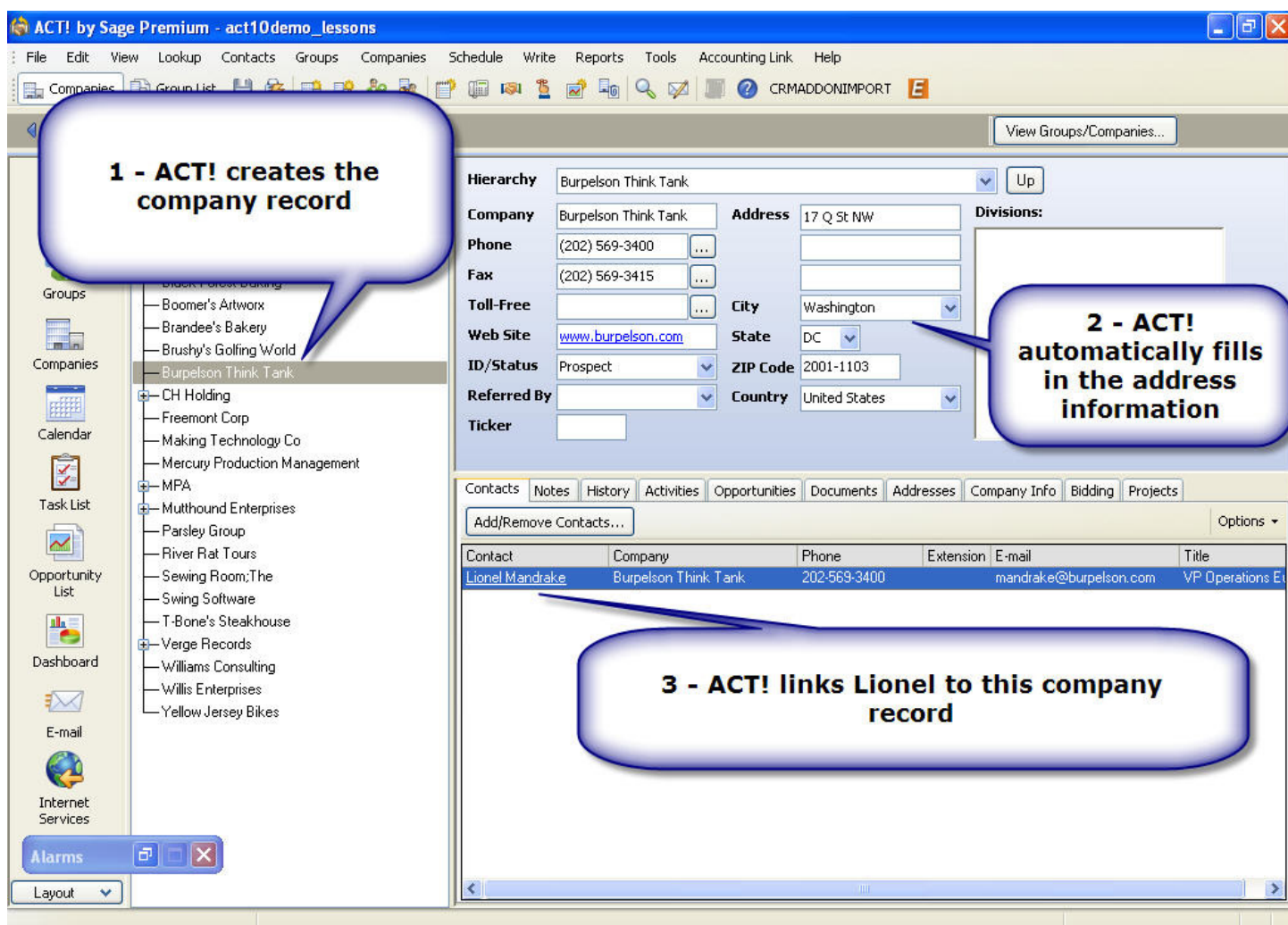


Figure 3

Figure 3 demonstrates the results. Three things occur:

1. ACT! creates a company record
2. ACT! brings up the company name and address information
3. ACT! links the first contact to this record

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**ACT! by Sage Premium - act10demo\_lessons**

File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Accounting Link Help

38 of 196 Contacts Contact List

Back Contact Detail View Groups/Companies...

**Company** Burpelson Think Tank **Address** 17 Q St NW

**Contact** Lionel Mandrake

**Salutation** Lionel

**Title** VP Operations Europe **City** Washington

**Department**

**Phone** 202-569-3400

**Mobile**

**Fax** 202-569-3415

**ID/Status** Prospect **Web Site** [www.burpelson.com](http://www.burpelson.com)

**Referred By**

**E-mail** [mandrake@burpelson.com](mailto:mandrake@burpelson.com)

Notes History Activities Opportunities Groups/Companies Secondary Contacts Documents Contact Info User Fields Home Address Accounting Link Warranty Card

Dates: All Dates Types: All Select Users Options

Date	Time	Result	Regarding & Details	Record Manager	Group/Company
10/20/2008	11:44 AM	Contact Linked	Linked to company Burpelson Think Tank	Chris Huffman	
5/20/2007	3:58 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Presentation 0%	Chris Huffman	
5/20/2007	3:58 PM	Opportunity Lost	New Opportunity \$4,000.00 Closed - Lost Friday, June 20, 2008 12:00:00 AM	Chris Huffman	
5/20/2007	3:55 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Needs Assessment 25%	Chris Huffman	
5/20/2007	3:53 PM	Opportunity Won	New Opportunity \$2,000.00 Closed - Won Friday, November 30, 2007 12:00:00 AM	Chris Huffman	
5/20/2007	3:53 PM	New Opportunity	New Opportunity - ACT! Sales Cycle Commitment to Buy 100%	Chris Huffman	
5/20/2007	3:52 PM	New Opportunity	/28/2007 - ACT! Sales Cycle Sales Fulfillment 100%	Chris Huffman	
5/20/2007	3:52 PM	Opportunity Won	/28/2007 \$24,000.00 Closed - Won Sunday, May 20, 2007 12:00:00 AM	Chris Huffman	
	5:11 PM	New Opportunity	New Opportunity - Sales Cycle Initial Communication 10%	Chris Huffman	

Alarms Layout

Lookup: All Contacts

Figure 4

Click on Lionel's name, it will bring you back to the contact record (Figure 4)



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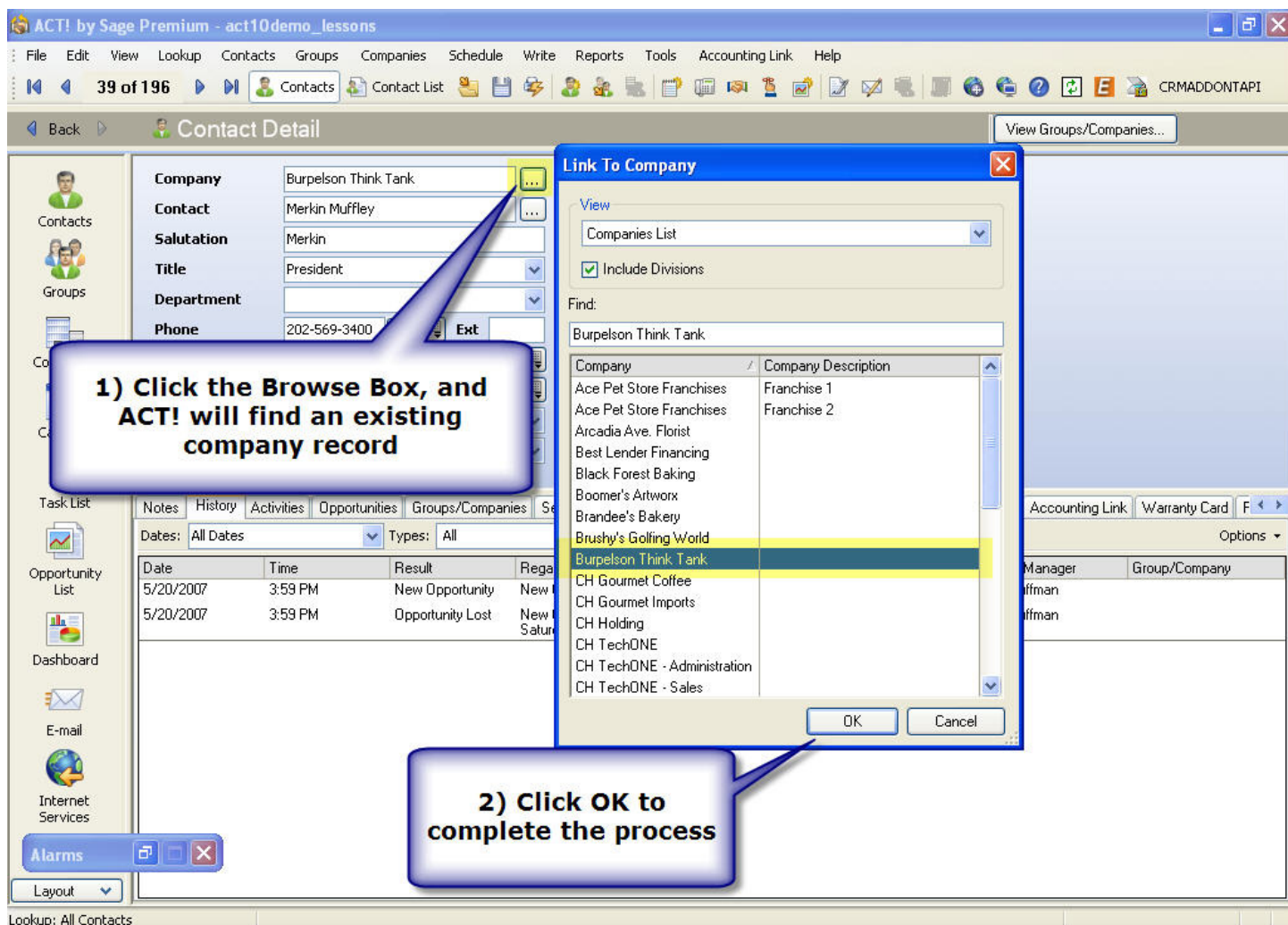


Figure 5

With the next record you can click the browse box and link Merkin to Burpelson Think Tank as shown in Figure 5.