

## Creating Company Records, Supplemental Guide

### Objective:

After this lesson, the learner will be able to:

- Define a company record in Act!
- Create a company record in Act! from an existing contact in Act!
- Add contacts to existing company records

### Conditions for Success:

- Act! v 2010+ has been installed
- You can lookup contacts in the database
- You know how to enter new contacts into Act!
- You know how to use the contact list view

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### Company Record Definition

A *company* is a record type that lets you track multiple contacts within an actual company and division structure

In an account management environment...

You 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 allow you to continue to manage the relationships.

After the company record is created, we can show you how you can easily see the results of all your interactions at a company.

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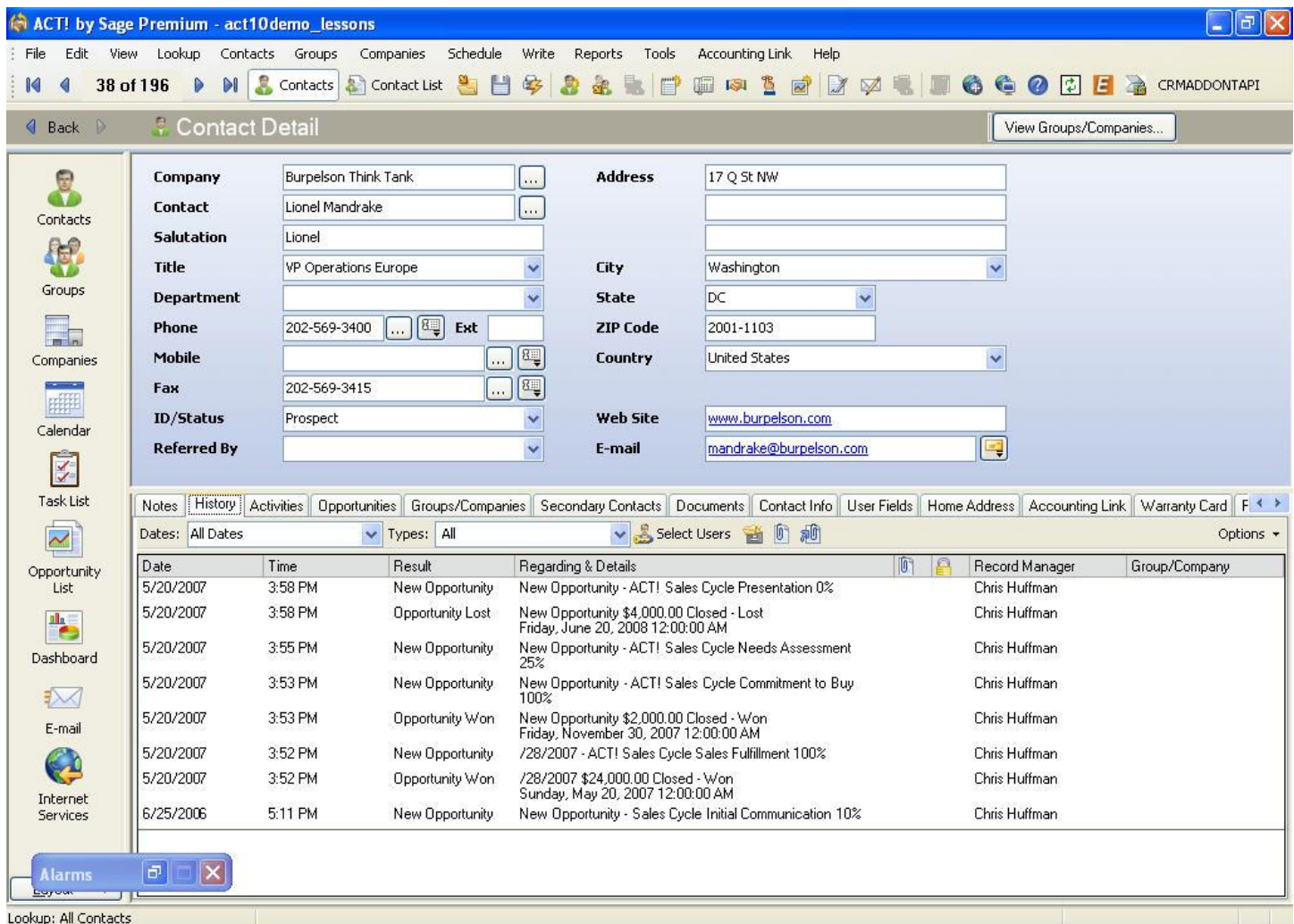
### Act! works along these principles

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 two contacts at the same organization (Burpelson Think Tank) and you want to make a company record and link them together. Here is the first record in figure 1.



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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** **State** DC

**Phone** 202-569-3400 **Ext** **ZIP Code** 2001-1103

**Mobile** **Country** United States

**Fax** 202-569-3415 **Web Site** [www.burpelson.com](http://www.burpelson.com)

**ID/Status** Prospect **E-mail** [mandrake@burpelson.com](mailto:mandrake@burpelson.com)

**Referred By**

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

Dates: All Dates Types: All Select Users Options

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	/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	
6/25/2006	5:11 PM	New Opportunity	New Opportunity - Sales Cycle Initial Communication 10%	Chris Huffman	

Alarms

Lookup: All Contacts

Figure 1

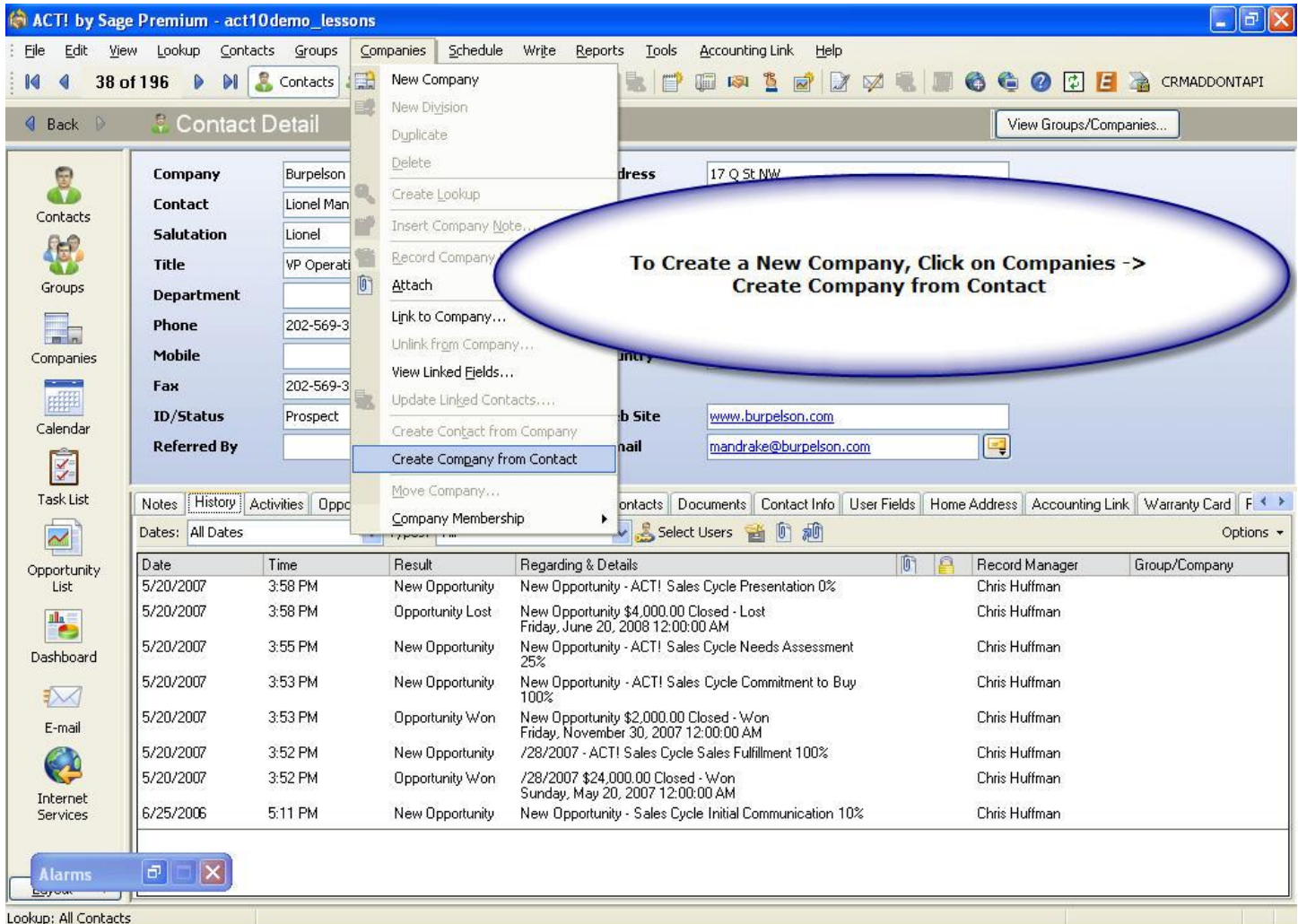


Figure 2

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

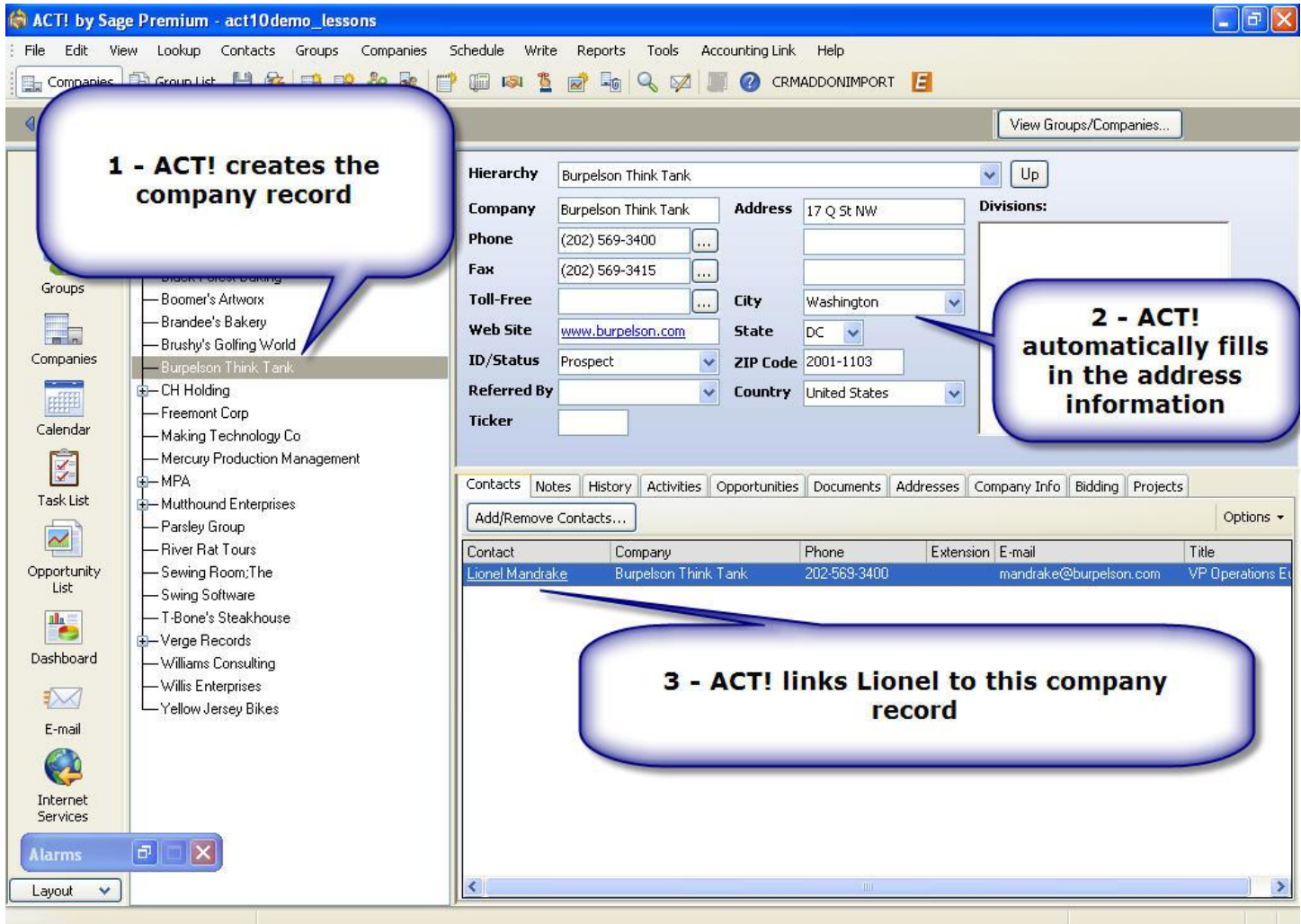


Figure 3

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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Back Contact Detail View Groups/Companies...

**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  
**Web Site** [www.burpelson.com](http://www.burpelson.com)  
**E-mail** [mandrake@burpelson.com](mailto:mandrake@burpelson.com)

Now, there is a hyperlink to company record

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

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	

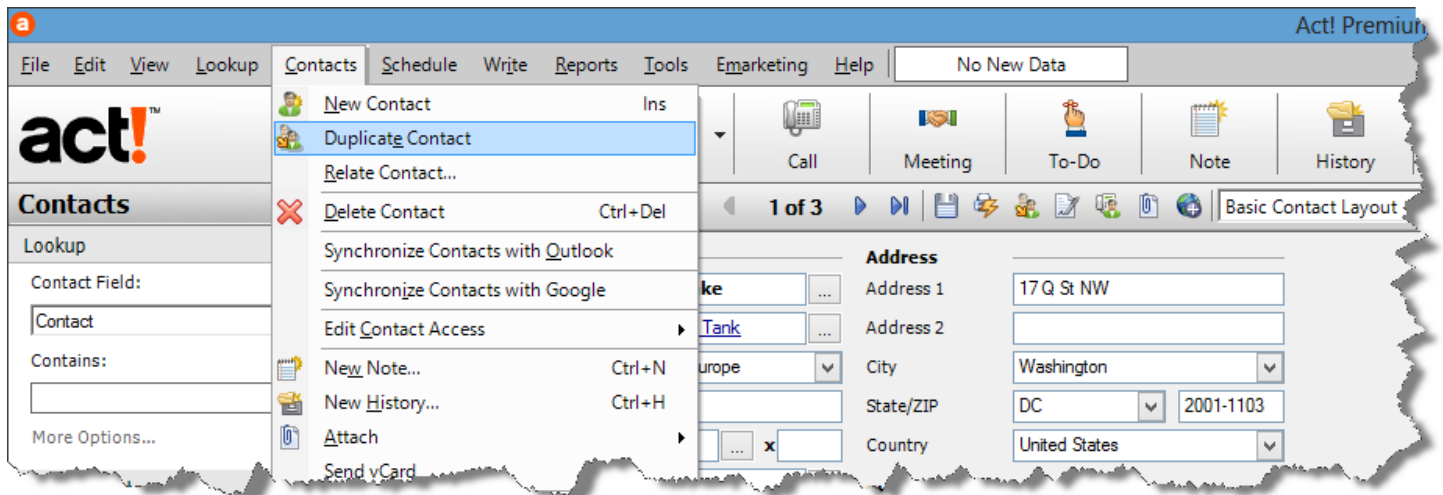
Alarms Layout

Lookup: All Contacts

Figure 4

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

Going forward when you meet additional contacts @ Burpelson Think Tank, lookup Lionel @ Burpelson Think Tank. Then press Contact -> Duplicate Contact. This ensures the next contact you meet there is linked properly.



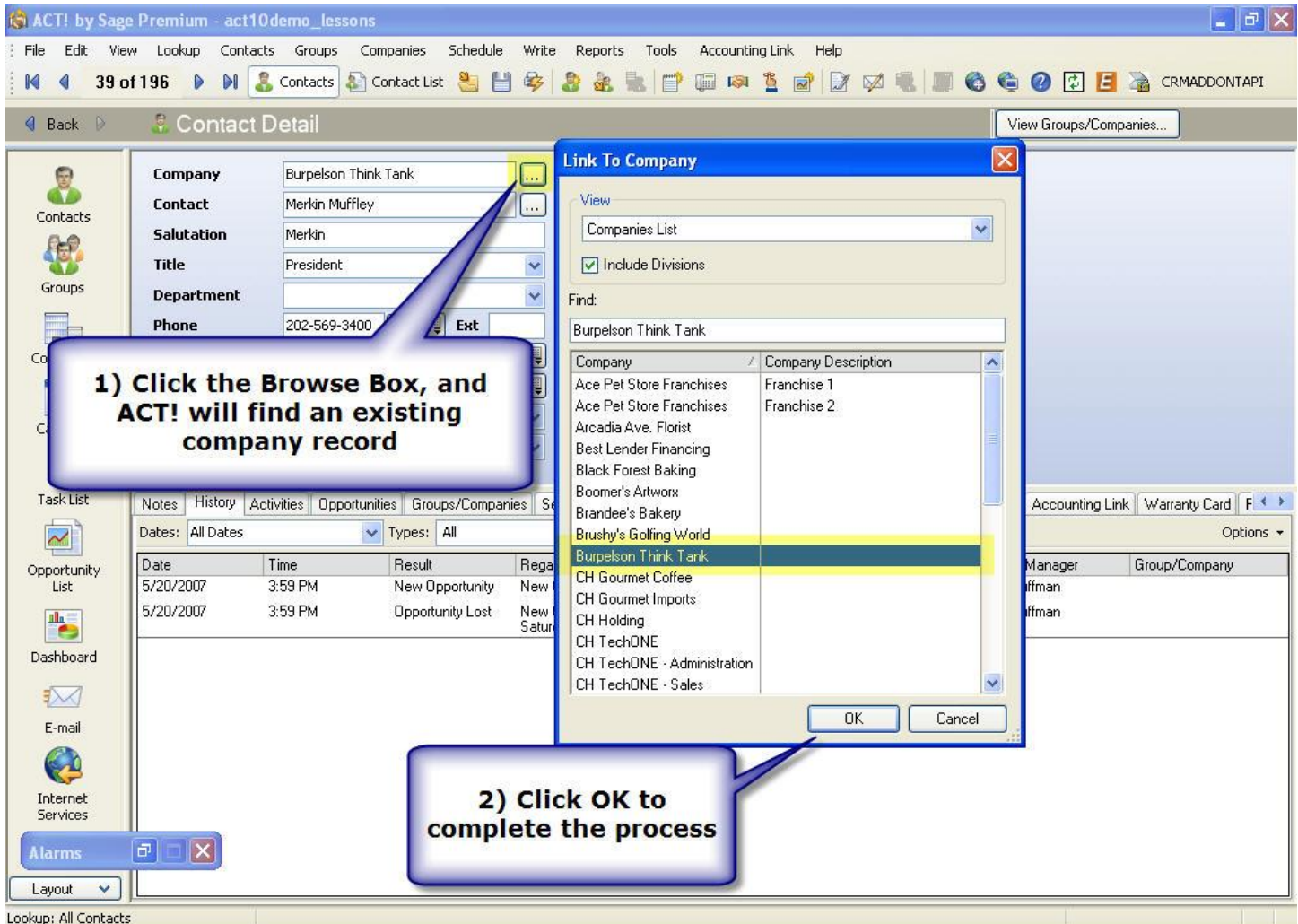


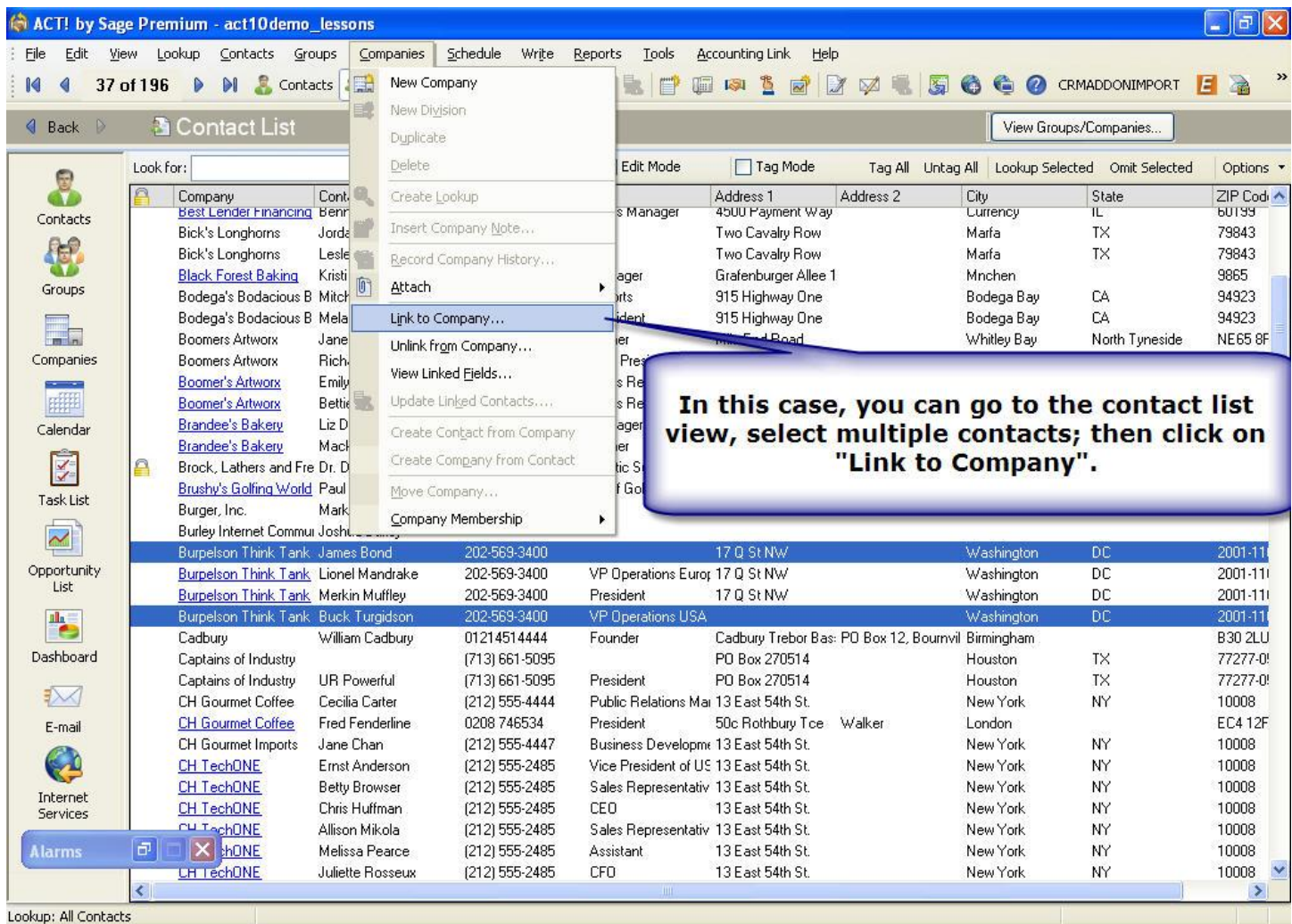
Figure 5

When other records at the same company exist, you can click the browse box and link Merkin to Burpelson Think Tank as shown in Figure 5.

## Case #2

You have many contacts you want to link together to a single contact record at once. Rather than doing this one record at a time, Act! can help you link existing contacts to existing company records. Press F11 to see the contact list view.

From the Contact List, you can highlight multiple people at once as shown in Figure 6.



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Back Contact List

Look for:

Company Contact

Best Lender Financing Benji

Bick's Longhorns Jorde

Bick's Longhorns Leslie

Black Forest Baking Kristi

Bodega's Bodacious B Mitch

Bodega's Bodacious B Mela

Boomers Artworx Jane

Boomers Artworx Rich

Boomer's Artworx Emily

Boomer's Artworx Bettie

Brandee's Bakery Liz D

Brandee's Bakery Mack

Brock, Lathers and Fire Dr. D

Brushy's Golfing World Paul

Burger, Inc. Mark

Burley Internet Commu Josh

Burpelson Think Tank James Bond 202-569-3400 17 Q St NW Washington DC 2001-11

Burpelson Think Tank Lionel Mandrake 202-569-3400 VP Operations Euro 17 Q St NW Washington DC 2001-11

Burpelson Think Tank Merkin Muffley 202-569-3400 President 17 Q St NW Washington DC 2001-11

Burpelson Think Tank Buck Turgidson 202-569-3400 VP Operations USA Washington DC 2001-11

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CH Gourmet Coffee Fred Fenderline 0208 746534 President 50c Rothbury Tce Walker London EC4 12F

CH Gourmet Imports Jane Chan (212) 555-4447 Business Developm 13 East 54th St. New York NY 10008

CH TechONE Ernst Anderson (212) 555-2485 Vice President of US 13 East 54th St. New York NY 10008

CH TechONE Betty Brower (212) 555-2485 Sales Representativ 13 East 54th St. New York NY 10008

CH TechONE Chris Huffman (212) 555-2485 CEO 13 East 54th St. New York NY 10008

CH TechONE Allison Mikola (212) 555-2485 Sales Representativ 13 East 54th St. New York NY 10008

CH TechONE Melissa Pearce (212) 555-2485 Assistant 13 East 54th St. New York NY 10008

CH TechONE Juliette Rosseux (212) 555-2485 CFO 13 East 54th St. New York NY 10008

Alarms

Lookup: All Contacts

**In this case, you can go to the contact list view, select multiple contacts; then click on "Link to Company".**

Figure 6

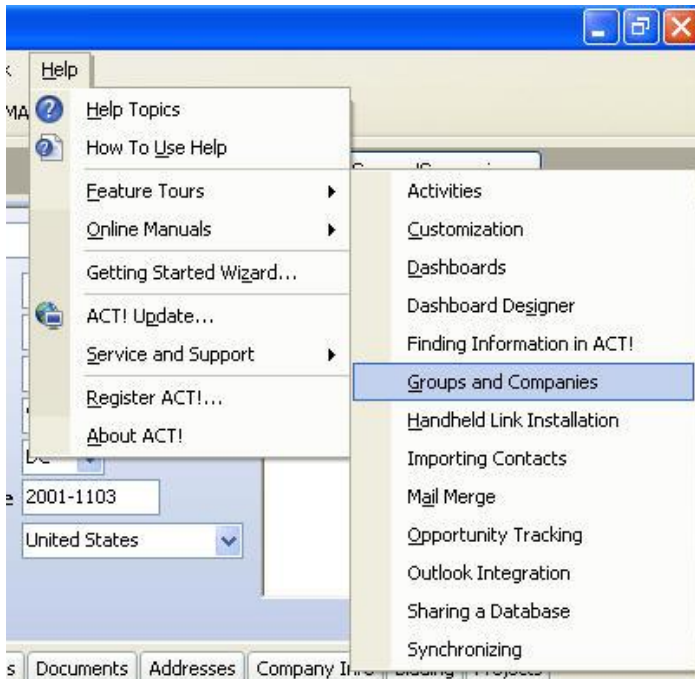




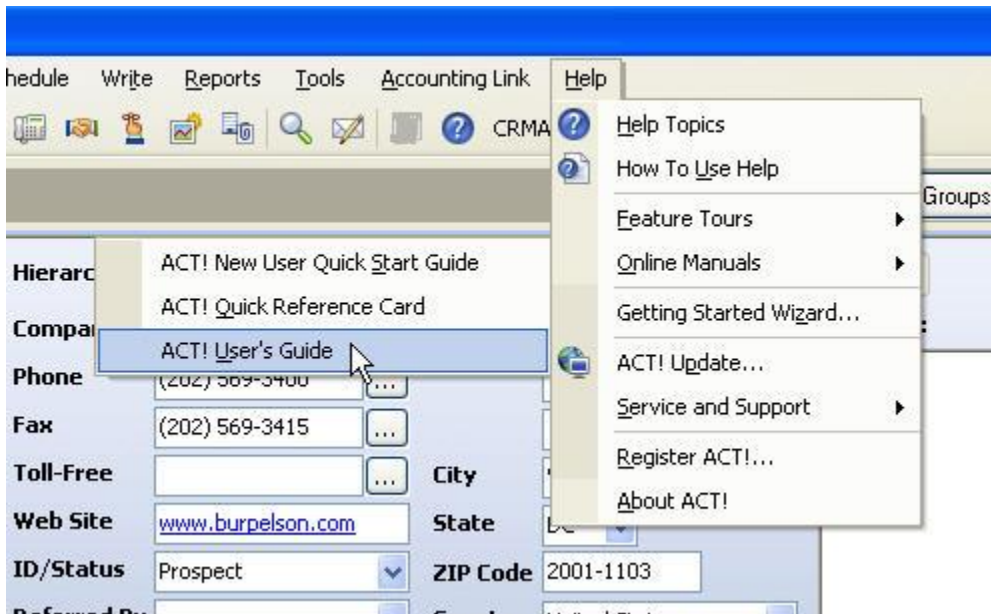
Figure 7

Once you press OK, Act! will show you contacts with a hyperlink symbol on the company name (Burpelson Think Tank) as shown in figure 8.

## Additional References:



## The Act! User's Guide



<http://support.act.com> – Answer ID 13884