

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

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.

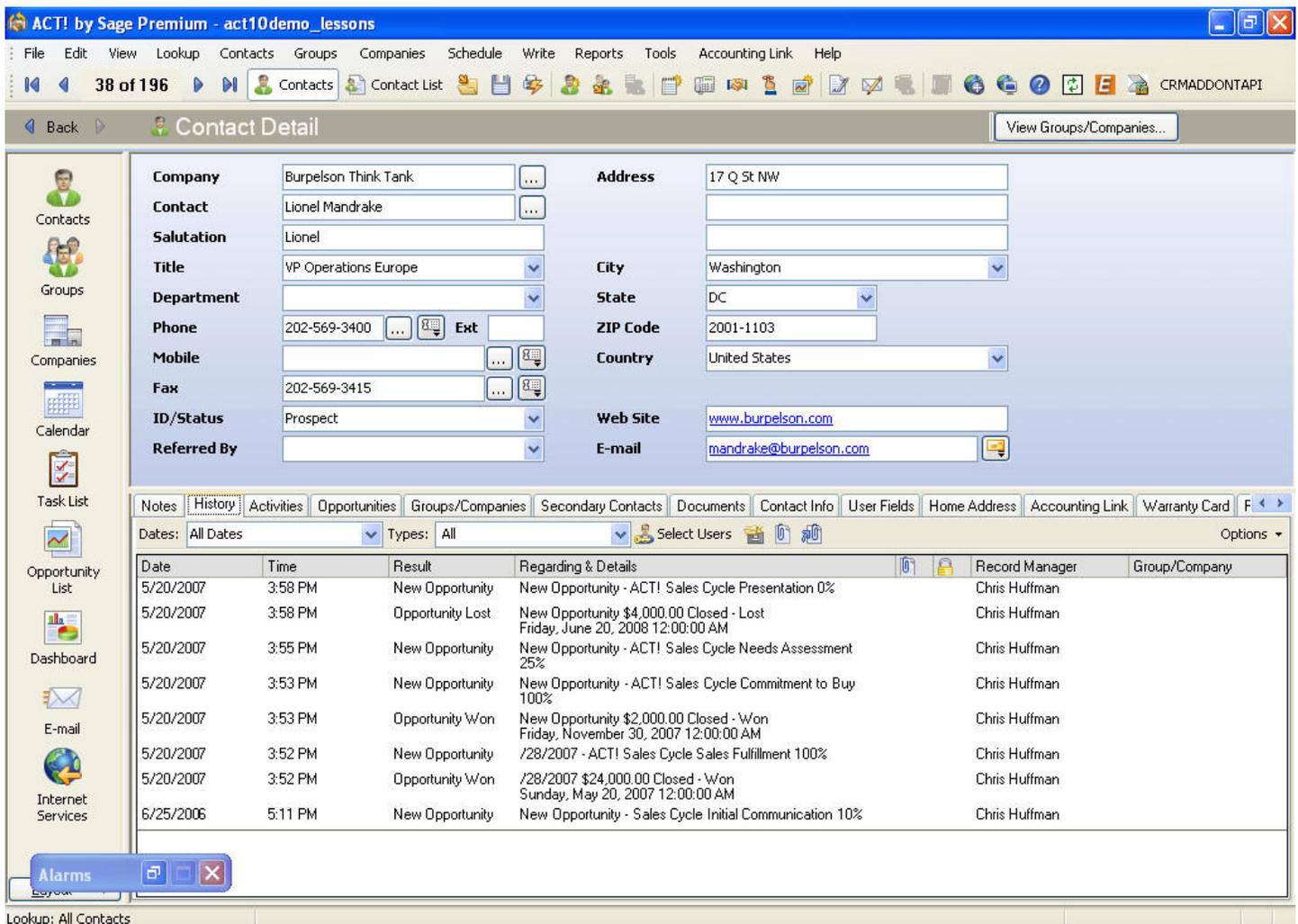
Act! works along these principles

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.



The screenshot shows the ACT! by Sage Premium software interface. The main window is titled "Contact Detail" for the contact "Lionel Mandrake" at the company "Burpelson Think Tank". The contact information includes a phone number (202-569-3400), a mobile number, a fax number (202-569-3415), and an email address (mandrake@burpelson.com). The contact's title is "VP Operations Europe" and their status is "Prospect".

Below the contact details is a table showing the activity history for this contact. The table has 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	/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	

Figure 1

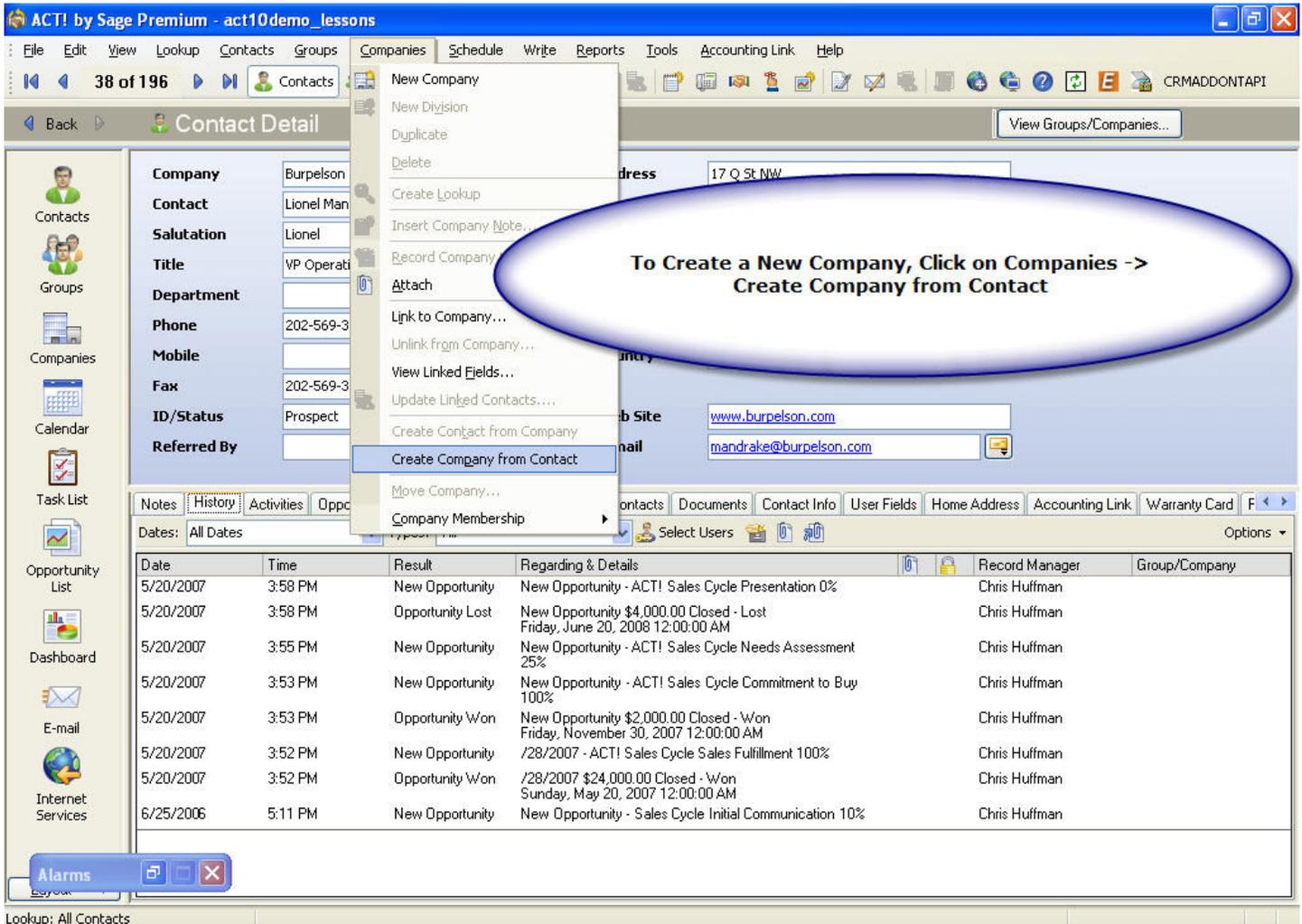


Figure 2

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

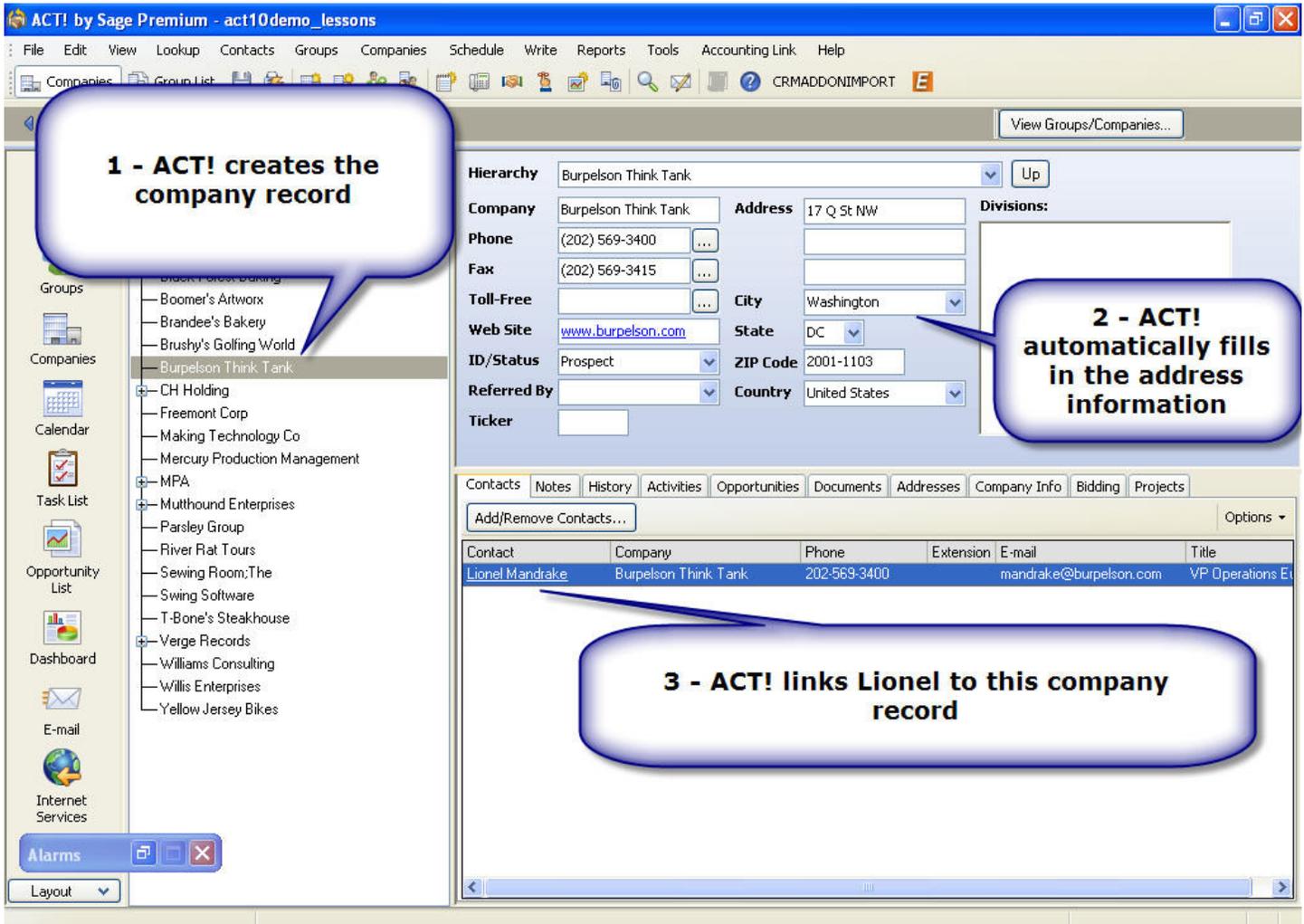


Figure 3

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

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 CRMADDONTAPI

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
Referred By: **E-mail:** 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	
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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)

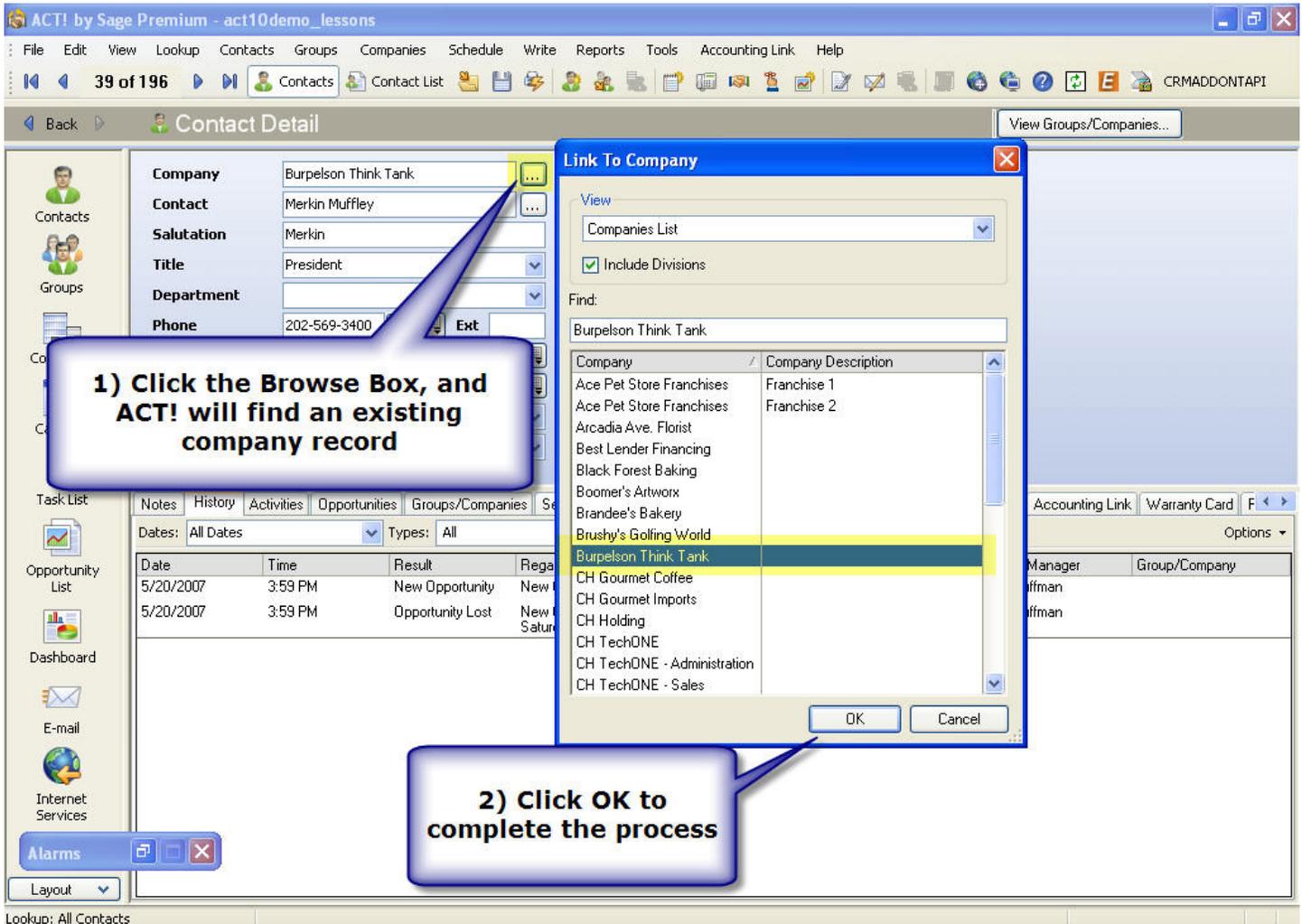


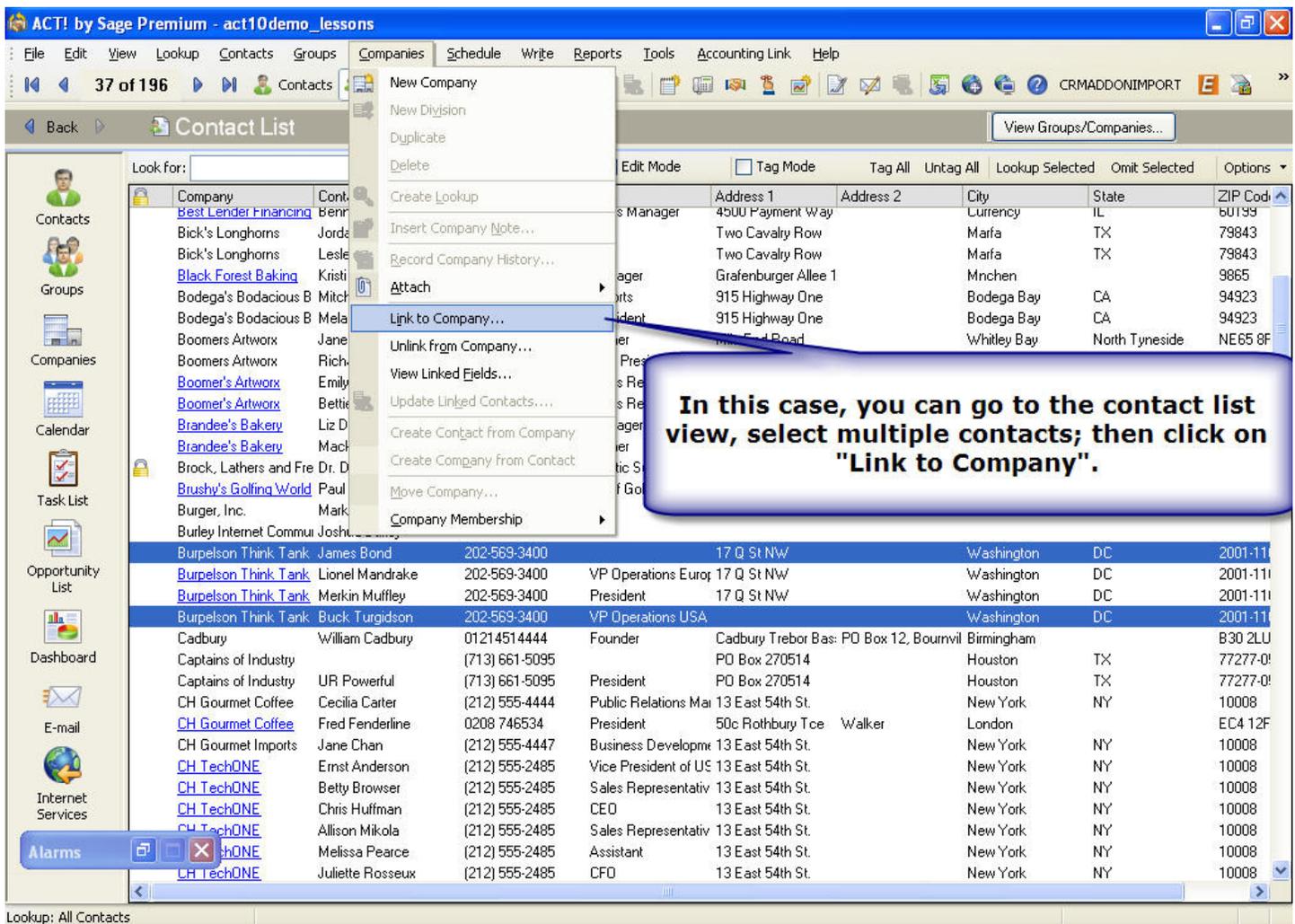
Figure 5

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.



The screenshot shows the ACT! by Sage Premium software interface. The 'Contact List' window is open, displaying a list of contacts. A context menu is open over the list, with the 'Link to Company...' option highlighted. A callout box with a blue border and white background contains the text: "In this case, you can go to the contact list view, select multiple contacts; then click on 'Link to Company'".

Company	Contact	Phone	Title	Address 1	Address 2	City	State	ZIP Code
Best Lender Financing	Benn			4500 Payment Way		Currency	IL	60199
Bick's Longhorns	Jorde			Two Cavalry Row		Marfa	TX	79843
Bick's Longhorns	Lesle			Two Cavalry Row		Marfa	TX	79843
Black Forest Baking	Kristi			Grafenburger Allee 1		Mnchen		9865
Bodega's Bodacious B	Mitch			915 Highway One		Bodega Bay	CA	94923
Bodega's Bodacious B	Mela			915 Highway One		Bodega Bay	CA	94923
Boomers Artworx	Jane			Two Cavalry Row		Whitley Bay	North Tyneside	NE65 8F
Boomers Artworx	Rich							
Boomer's Artworx	Emily							
Boomer's Artworx	Bettie							
Brandee's Bakery	Liz D							
Brandee's Bakery	Mach							
Brock, Lathers and Frie	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 Mulfley	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
Cadbury	William Cadbury	01214514444	Founder	Cadbury Trebor Bas	PO Box 12, Bourvil	Birmingham		B30 2LU
Captains of Industry		(713) 661-5095		PO Box 270514		Houston	TX	77277-0
Captains of Industry	UR Powerful	(713) 661-5095	President	PO Box 270514		Houston	TX	77277-0
CH Gourmet Coffee	Cecilia Carter	(212) 555-4444	Public Relations Ma	13 East 54th St.		New York	NY	10008
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	CFD	13 East 54th St.		New York	NY	10008

Figure 6

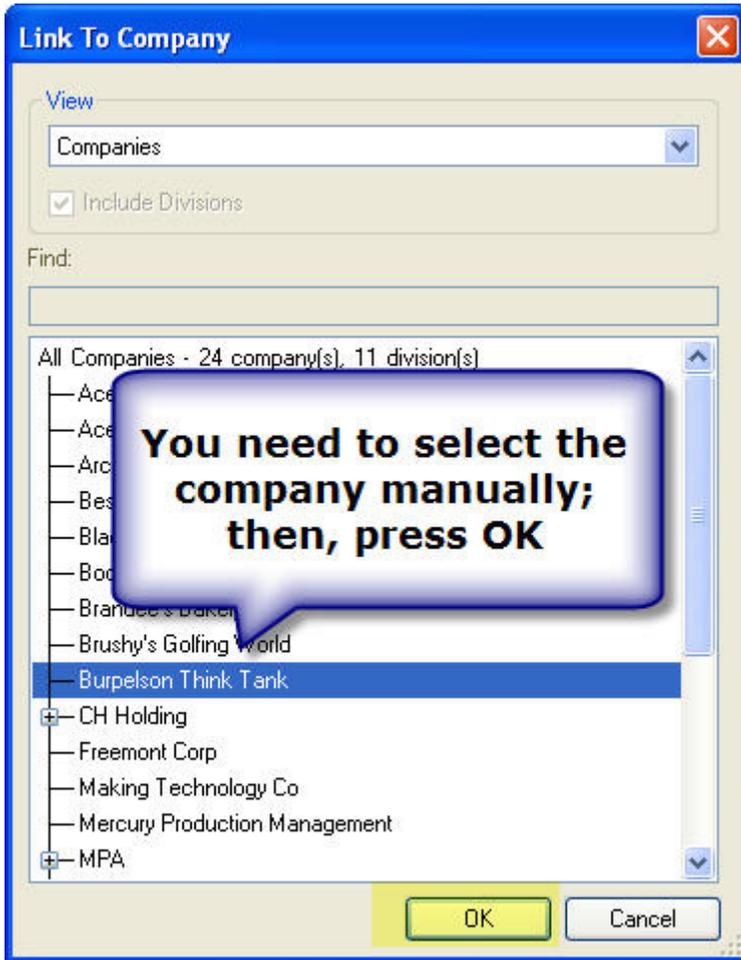
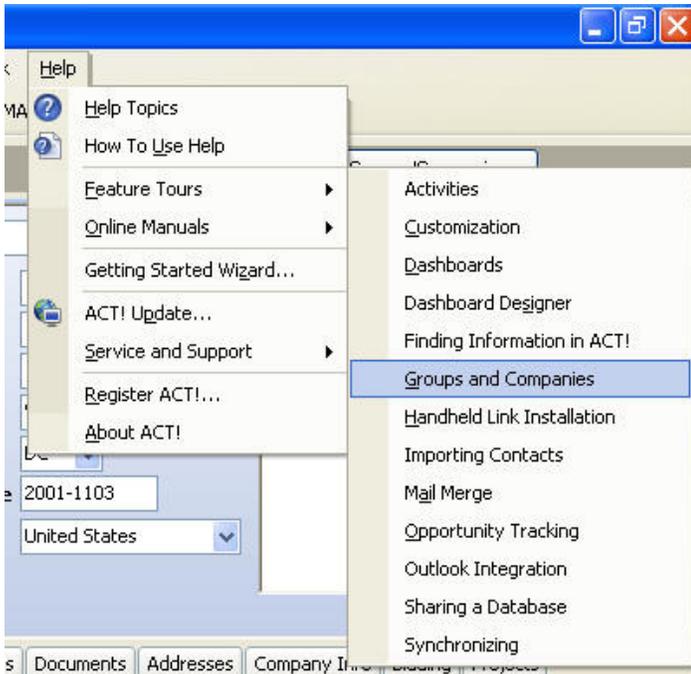


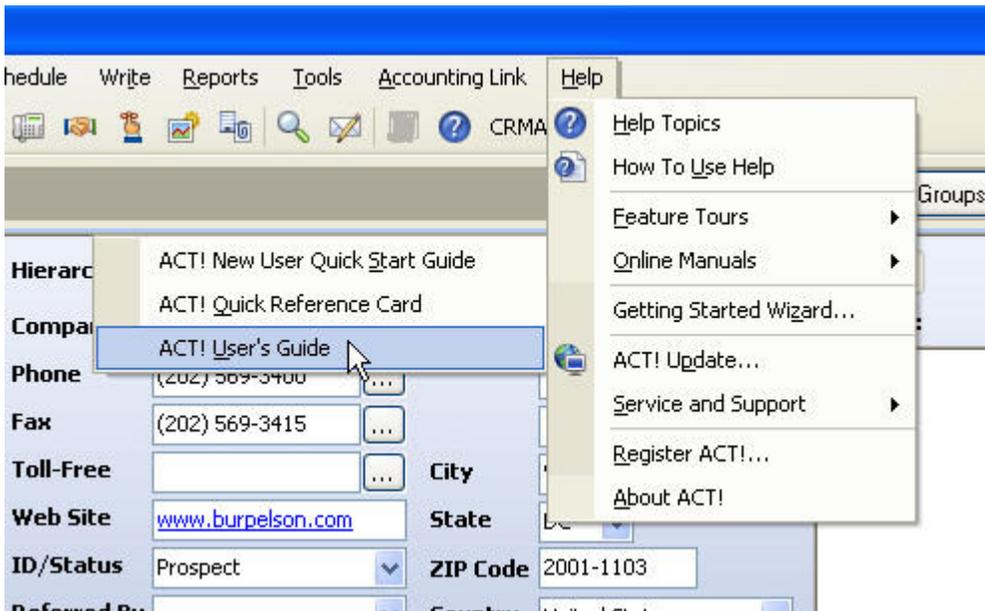
Figure 7

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