



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.

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





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





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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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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:

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