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1 Foreword: ACTOptimum+

Powerful functional upgrade for Act! 12.0 (2010) and higher

ACTOptimum+ the sixth edition of the add-on suite from Melville-Schellmann for Act! offers extended functionality and is now available for version 12.0 (2010) and above.

First released in 2002 for Act! 6.0, this “toolbox” has been continually improved and remains fully up to date, compatible with the latest Act! versions.

The standard version of Act! provides a huge amount of functionality, ACTOptimum+ expands on this and adds additional features that enhance the user experience.

Melville-Schellmann have taken onboard extensive customer feedback in order to continually improve ACTOptimum+ and incorporate additional features. The add-on suite is therefore a “living” software which will keep maturing and growing for as long as its customers want it to.

We hope the new features provided by ACTOptimum+ will enhance your user experience in the professional Act! environment.

Ahrensburg, 30.5.2017

Melville–Schellmann

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2 Installation and Registration

To use the ACTOptimum+ software, you will firstly need to download it, then install it and finally register it.

In order to download the software, you will have been provided with a link at the point of purchase.

Once the software has been downloaded and installed, you will then need to register the software. It is possible to trial ACTOptimum+, but you will require a Registration code to continue using it.

2.1 Installation

Once you have downloaded ACTOptimum+ you will have an installation file called **Setup_ACTOptimum+_en.exe**. Make sure that Act! is closed down, as well as any other programs that you might have running before beginning the installation.

To start installing ACTOptimum+, simply double-click the installation file. You will see the below screen:

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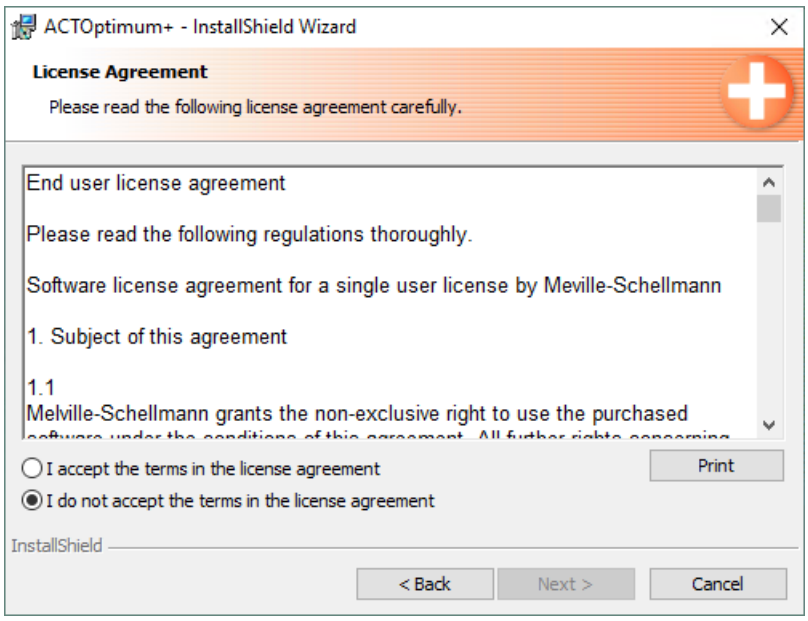
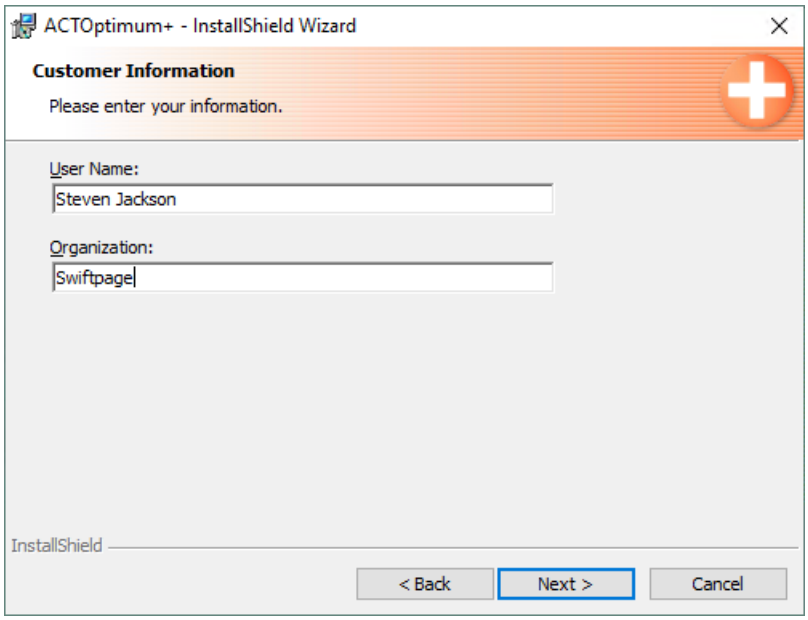
Once you have clicked **Next** you will then be prompted to read through the license agreement.



Please make sure you agree to the terms of the license agreement, then click **Next**.

The following two screens will prompt you to input your **User Name** and **Organization**, then will ask you if you would like to perform a **Typical** or **Custom** installation:



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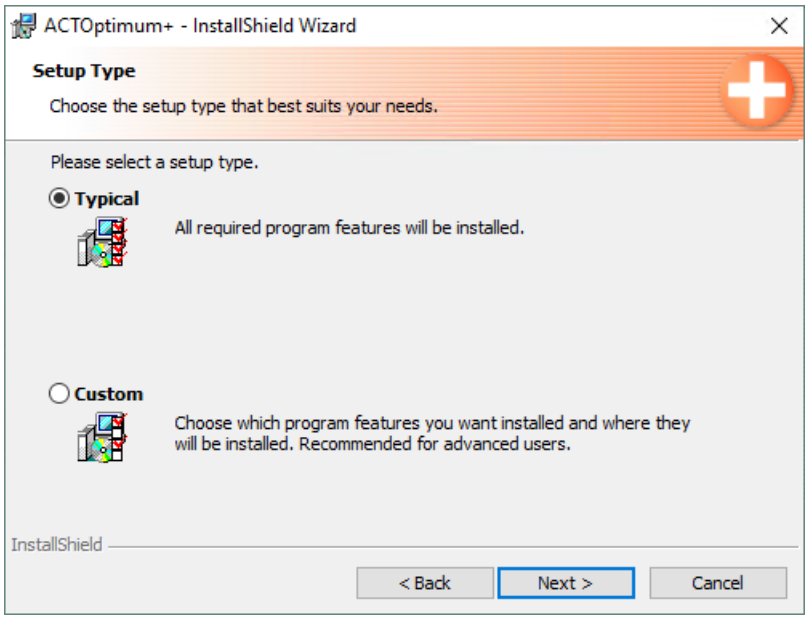
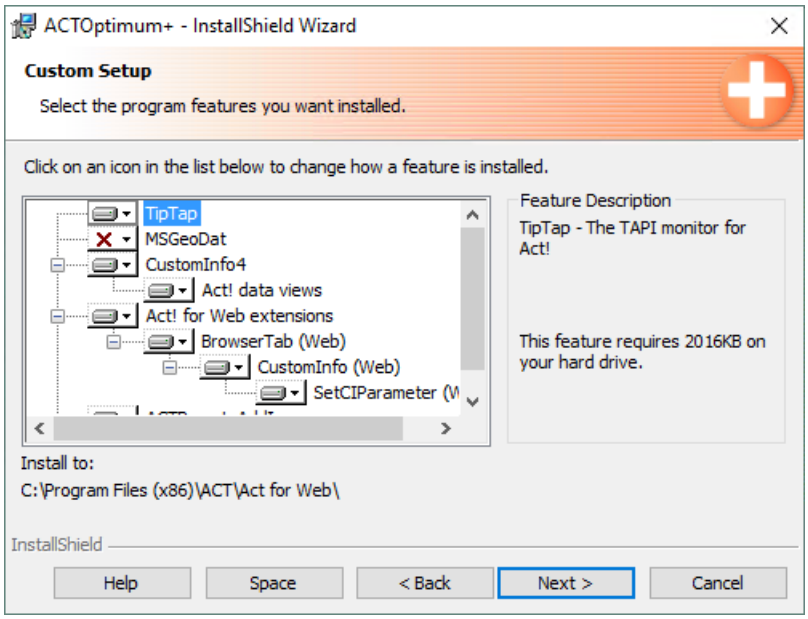


Most users will prefer to use a **Typical** installation which will install all of the features of ACTOptimum+, however if you would prefer to specify which features you want to use, then you can perform a **Custom** installation.

If you choose **Custom**, and then click **Next**, you will see the following options:



Once you have chosen which components to install, you can click **Next** to continue with the installation process.

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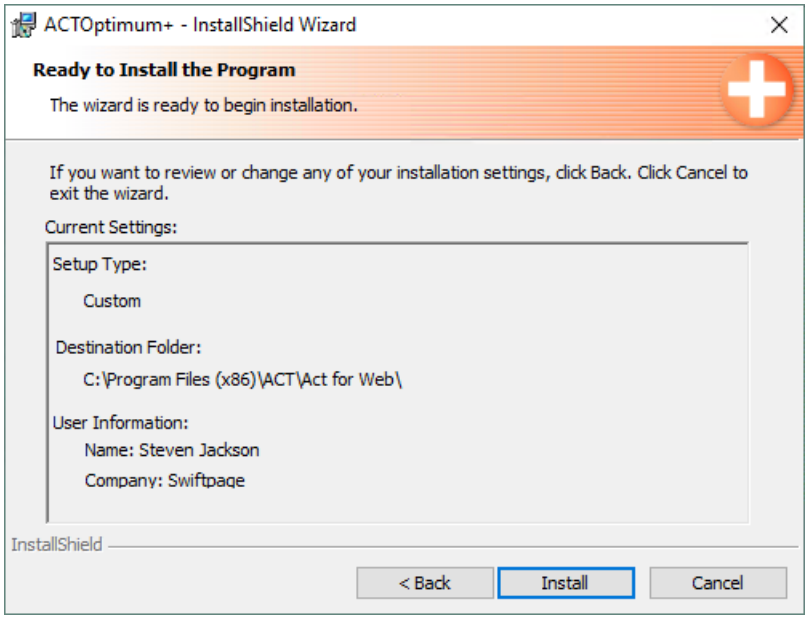
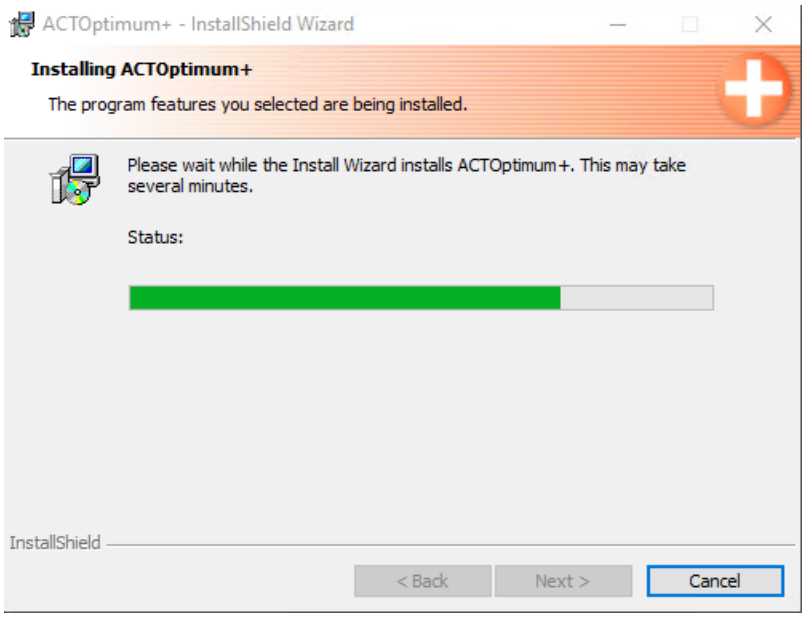
If you have chosen to perform a **Typical** installation, when you click **Next** you will see the following screen instead that confirms the choices you have made:



The final step is to click the **Install** button. This will then install ACTOptimum+ for you.



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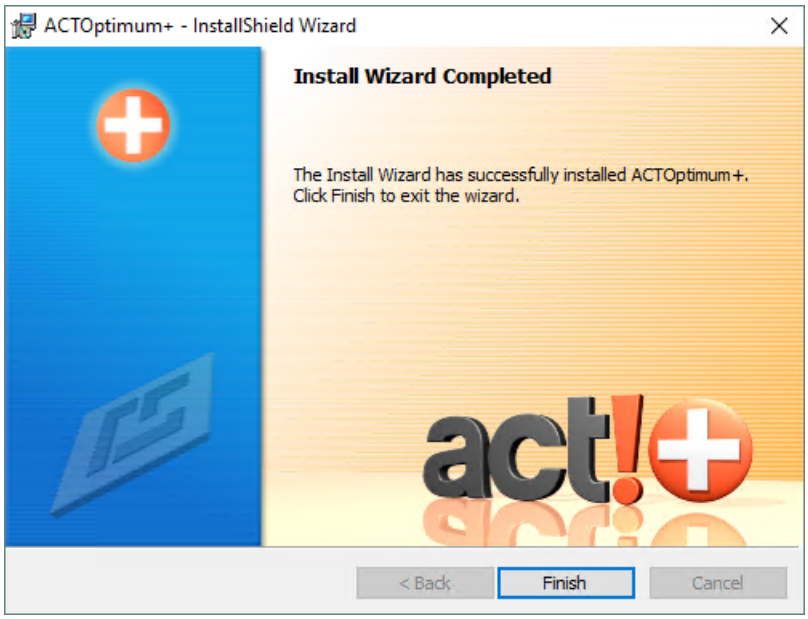

On restarting the Act! application, you will find the program modules of **ACTOptimum+** available. A detailed description of these features follows from section **3** onwards. A new menu item in Act! also allows you to configure the individual modules.

In case you want to uninstall the program, you can do so from **Programs and Features** as normal, or you can go to **Start ➔ All Programs ➔ Melville_Schellmann ➔** ACTOptimum+ **➔** ACTOptimum+ **uninstall**

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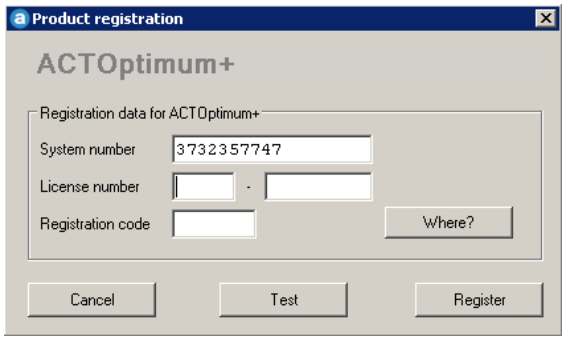
2.2 Registration

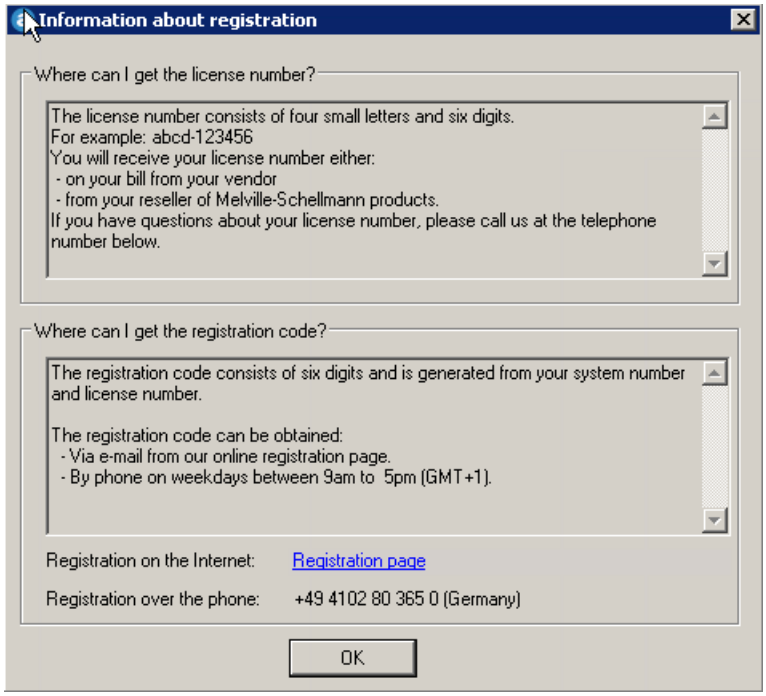
Once you have installed ACTOptimum+ and then restarted the Act! Application, you will be prompted to register your copy of the ACTOptimum+ software.



If you wish to trial ACTOptimum+ you can click on the **Test** button. Once you have completed all of the infromation correctly, click the **Register** button to actually register the software.

Your **License number** will be provided for you at the point of purchase, and will take the format of 4 lower case letters followed by 6 numbers (eg. abcd-123456).

To get a **Registration code**, you have two options available. Firstly you can choose to fill out an online registration form. You can access this form by clicking the **Where?** Button which will show the following screen:



Next to **Internet registration** you can see a link to click to fill out the online registration form. This will provide you with a **Registration code** that you can use to complete your registration.

Alternatively, you can register over the phone by calling Melville-Schellmann. If you take this option, you will need to provide your **System number** and your **License number** to the technician that you speak to. The technician will take this information and use it to provide you with a **Registration code** which will allow you to complete the registration process.

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3 Overview of available modules

ACTOptimum+ contains the following additional functions.

ActPlus
Adds context menus that provide quick links between different Act! database entities (contacts/companies/groups/opportunities).

ActRemote
Is an interface that enables external applications to access the running Act! Application. Needs to be switched on to allow the additional functions included in ACTOptimum+ to run.

AdvancedReplace
Adds find/replace functionality to Act!, including the ability to replace only part of an Act! field (contacts/companies/groups/opportunities).

AutoNum
Allows you to manage the numbering of fields (contacts/companies/groups/opportunities).

AutoData
Integration of command buttons into layouts (contacts/companies/groups/opportunities) to allow automation/scripting of Act! functions, eg. calculate 2 field values into a target field etc. This is an advanced feature that requires knowledge of scripting.

BrowserTab
Allows the creation of multiple custom tabs in various parts of the Act! program (contacts/companies/groups/opportunities) that display integrated web services (URLs) and shortcuts to folders.

QuickSearch
Powerful custom search tool allowing you to search multiple fields that you have specified at the same time. Possible to set up multiple SchnellSuches, and available in all Act! views (contacts/companies/groups/opportunities).

RadiusSearch
Searches contacts/companies based upon a given distance from a specified Postcode.

TipTap
CTI software recognizing incoming calls and that allows complete call management. Features of this include: Lookup of calling contact, creation of call history in Act!, display of previous call history etc.

ActPatch
Collection of various patches for the Act! application and the Act! database starting with Version 12 (2010).

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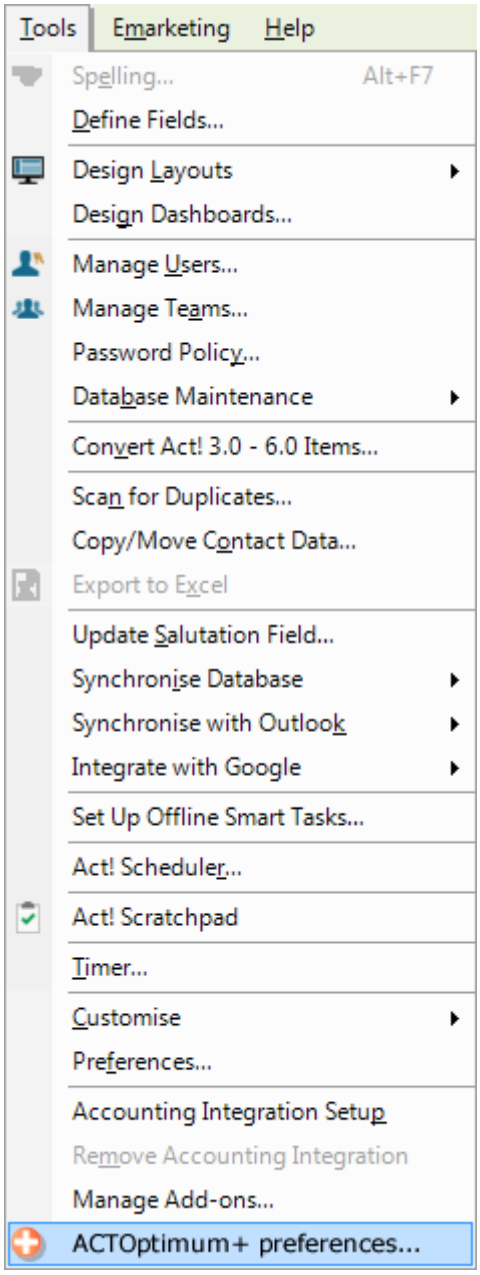
4 Settings and configuration of ACTOptimum+

After installation of ACTOptimum+ you will find a new menu item under **Tools** in the Act! application



Click on the menu item to open the configuration screen of ACTOptimum+.

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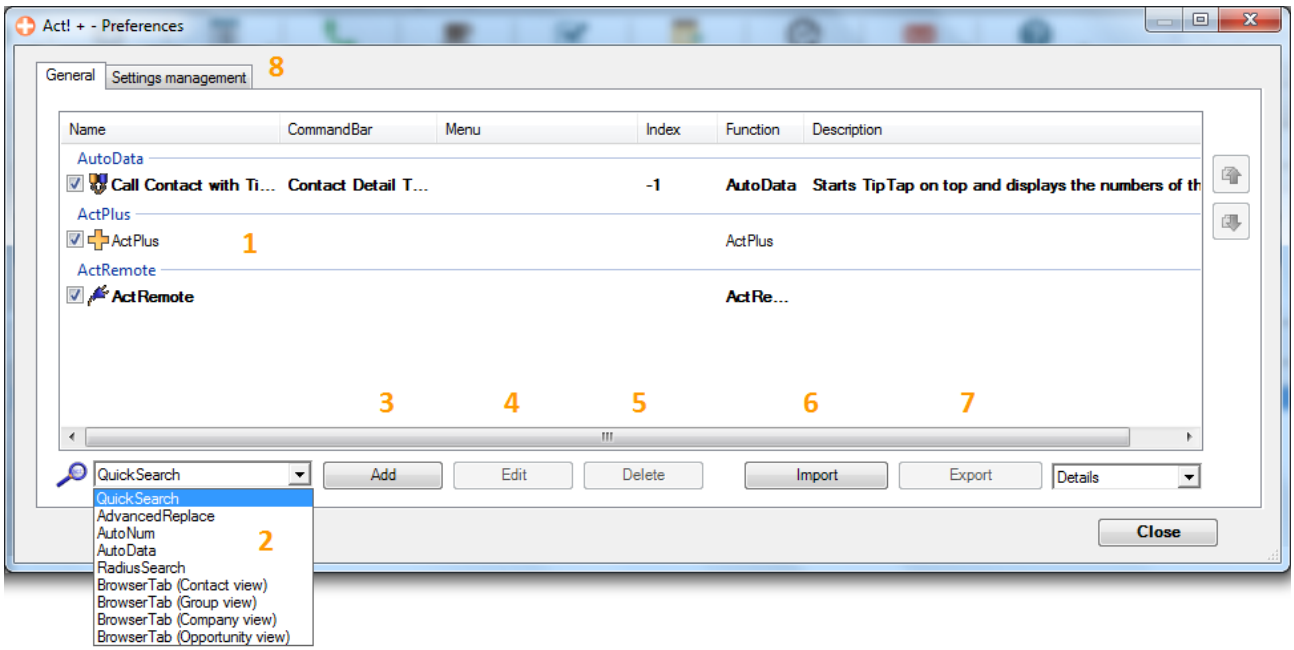
4.1 Configuration screen of ACTOptimum+



1 The configuration list allows you to enable/disable the ACTOptimum+ functions available in the current database. Each configuration list item (1) can be enabled/disabled individually by the logged-in user by checking/unchecking the corresponding checkbox .

2 A dropdown list (2) shows all available functions from ACTOptimum+ that you can add into the Act! program. Some functions can be added multiple times, these will be discussed in their own corresponding sections later.

3 The **Add** button allows you to add a function to the configuration list. Only Act! administrators are allowed to do so.

4 The **Edit** button opens the details of the selected function. This allows you to set individual parameters of the function.

5 **Delete** removes a configuration list item (1). These can then be re-added later.

6 **Import** allows you to import an XML file containing a configuration from elsewhere. You would use this if you bought a new laptop and wanted to transfer youy ACTOptimum+ configuration to it.

7 **Export** allows you to export a configuration list or parts of it (highlighted) to an XML file so that it could be imported later. The configuration of **ACTOptimum+** is saved to the current Act! database. Exporting a configuration is meant to be used in cases where a configuration needs to be transferred to another Act! database.

8 The tab **Settings management** contains some administrative functions like deleting all settings from this database, importing old ACTOptimum+ settings or reloading of current settings.

The detailed settings (ie. what is found behind the **Edit** button) of each function will be described in the corresponding chapter below.

Please note that the various functions can be added to the configuration more than once and into different places in the Act! application using different settings for each function.

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4.2 General settings for all ACTOptimum+ functions

Whenever you add another function into your ACTOptimum+ preferences (as per the previous screenshot), you will be prompted to configure settings for that function.

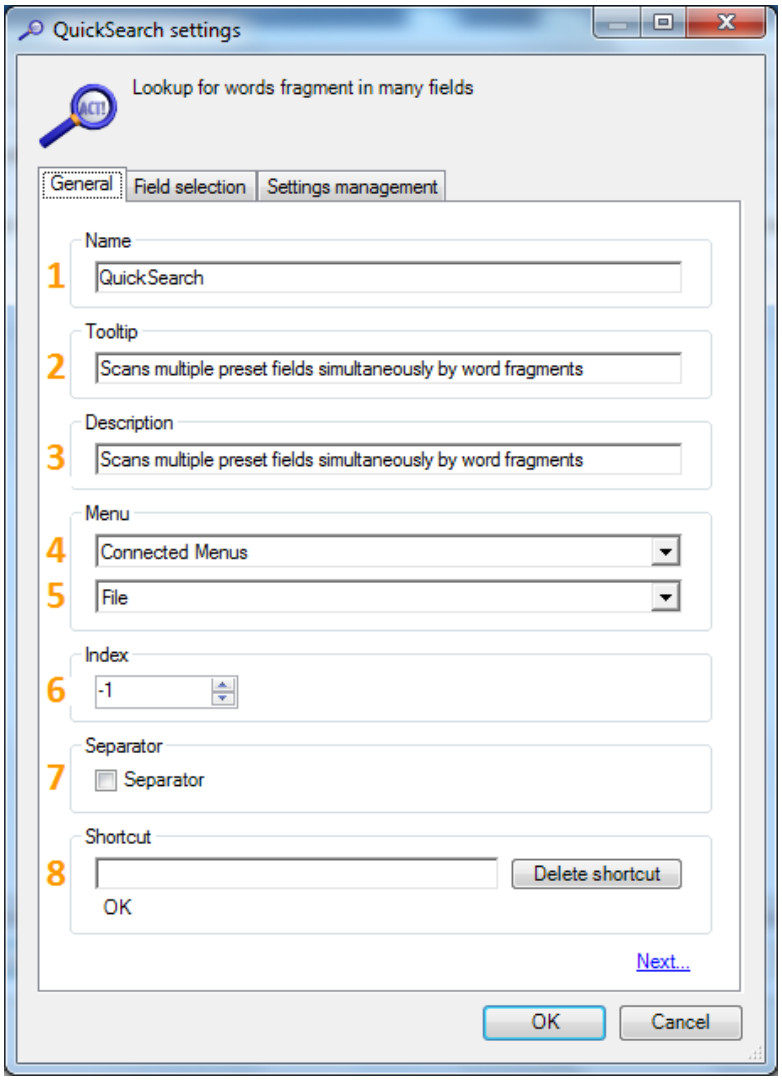
There are some settings that are general for all Act! functions that you add. We will look at these now.

Please Note: As this manual progresses we will be looking at each ACTOptimum+ function in detail, however we will not explain these settings each time as they are identical across all of the functions that you can add.

Using **QuickSearch** as an example, we will now explain these settings.

Select **QuickSearch** from the dropdown list and click the **Add** button to add this function to the configuration list.

This screen will open:



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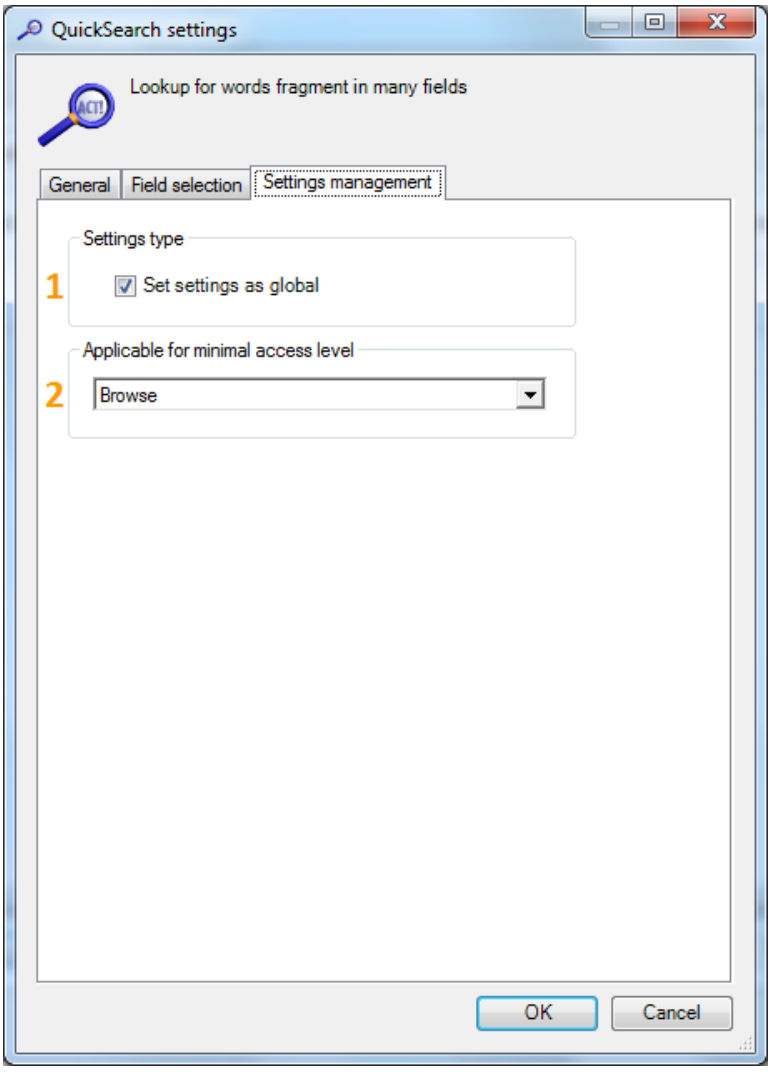
4.2.1 General Tab

This Tab will set the displayed function name and the location of the menu item.

1. Set the function name (especially important if you intend to use the function more than once).
2. Tool tip (visible in case the function appears in a toolbar).
3. Extended text description (optional).
4. Set the location of the function icon (one of the toolbars or a menu item).
5. If "Connected Menus" was selected under 4, the actual menu to be used is set here.
6. If "Connected Menus" was selected under 4, the "Index" specifies the item position.
7. An optional separator can be added above the menu item.
8. "Shortcut" offers the option to use a keyboard function to call up the item.

4.2.2 Settings Management Tab

The Tab **Settings-Management** contains 2 options:



1. Setting the checkbox will set the configuration of the selected function to "global". Only Act! Administrators can change the settings now.
2. An Act! user security role can be set as the minimum required level to use this function.
   Setting up this configuration is the same procedure as for the other ACTOptimum+ functions and is therefore **not repeatedly shown** in the following descriptions.

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5 QuickSearch

5.1 Introduction

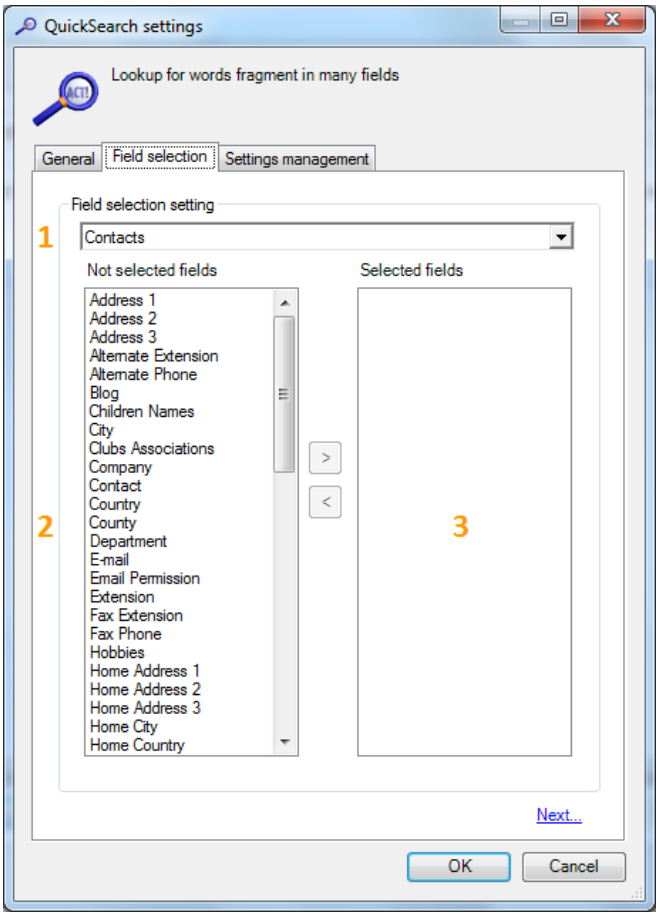
Finding and displaying contacts (as well as companies, groups and opportunities) *quickly* is one of the most basic requirements of any contact management tool. Searching in several fields simultaneously using fragments of the search term is the most convenient way of getting the best results.

The basic version of Act! allows you to perform a wildcard search, but it is limited to the Universal Search function.

QuickSearch is extremely practical and easy to use. It traces contacts, companies, groups and opportunities in a matter of seconds, using fragments of the search term in freely definable fields.

5.2 Configuration of QuickSearch

QuickSearch has only one tab containing specific parameters. The other two are the generic settings tabs that we have already discussed earlier. The tab **Field selection** is used to select the main entity and the Act! fields to be used simultaneously.



1. Choose the main entity (contacts, companies, groups or opportunities). In the area below (2) you will see the corresponding field list.
2. A double click on a field on the left side will move the field into the right area (3). Up to 20 fields can be selected.
3. Shows the selected fields to be searched simultaneously.

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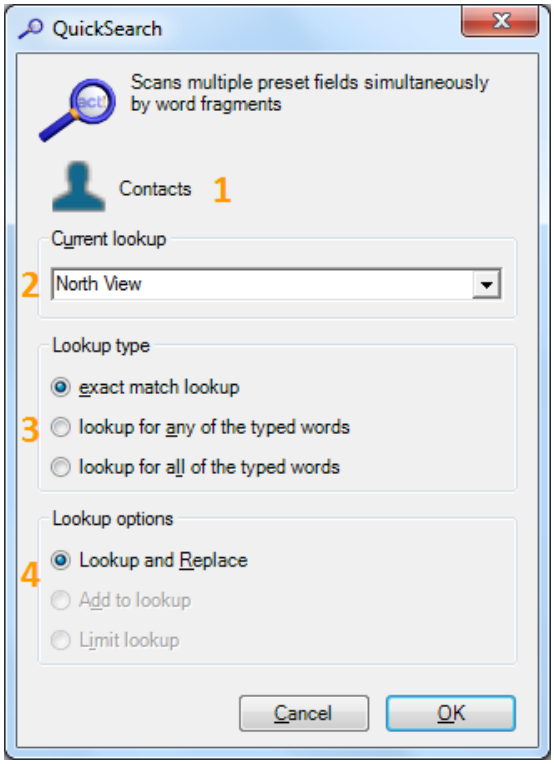
5.3 Using QuickSearch in Act!

Once you initiate the **ACTOptimum+** function **QuickSearch**, a search window appears where you can enter one or more search terms. You only need to type fragments of words to filter all data records containing these search entries.

After confirming with **OK**, the Act! program searches for the fragment you entered in the fields selected.



1. Act! main entity for current lookup
2. Input field (with dropdown list containing last 10 lookups)
3. Lookup options (sticky setting): exact match, any word (OR), all words (AND)
4. Gives the options (sticky setting) "replace current lookup", "add to current lookup", "narrow current lookup".

Note: If one of the search terms in the above dialogue (2) is longer than the length of the shortest field from the list of fields, a message "search string too long" will appear.

The option "all words" allows you to look up things like "mill alan swift" to find somebody whose last name starts with "Mill", first name is "Alan" and he might work for "Swift"page.

Recommendation: Set a keyboard shortcut for the function (e.g. F3) on the General tab.

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6 ActReplace

6.1 Introduction

Act! already includes a function that lets you replace the contents of any field with other data. But only the contents of the entire field can be replaced; replacement of field fragments is not supported.

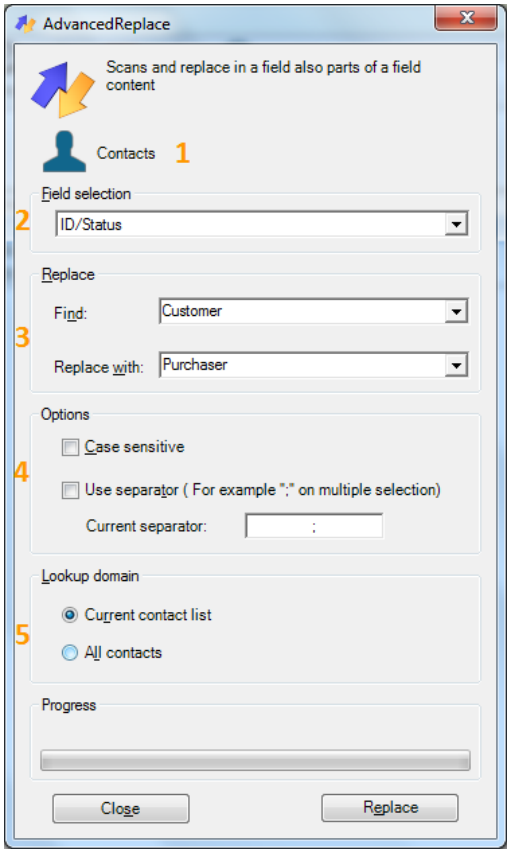
For example, Act! allows you to set up dropdown lists with multiple selections, using a default separator (semicolon) between values. You cannot add or replace individual values en masse with this set-up.

This gap has been bridged with **ActReplace**.

6.2 Configuration of ActReplace

No special options to be set up except the general settings which were covered earlier.

6.3 Using ActReplace in Act!



1. **ActReplace** shows the current main entity (contacts, companies, groups, opportunities).
2. Field list of current entity.
3. Input window for search string and replace string. The special parameter {0} allows you to set the current field content as placeholder. So for example, if I wanted to add +44 to the start of the phone field, I would use {0} in the find field and +44{0} in the Replace with field.
4. Sets case sensitivity on or off and configures the usage of a field separator to be able to add or remove it. This is customizable as customers may have used their own separators when filling out fields (eg. Having a city field completed with a value of **Ealing, London**)
5. Selects the lookup specified for the replace operation (current lookup or all records of the current entity).

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7 AutoNum

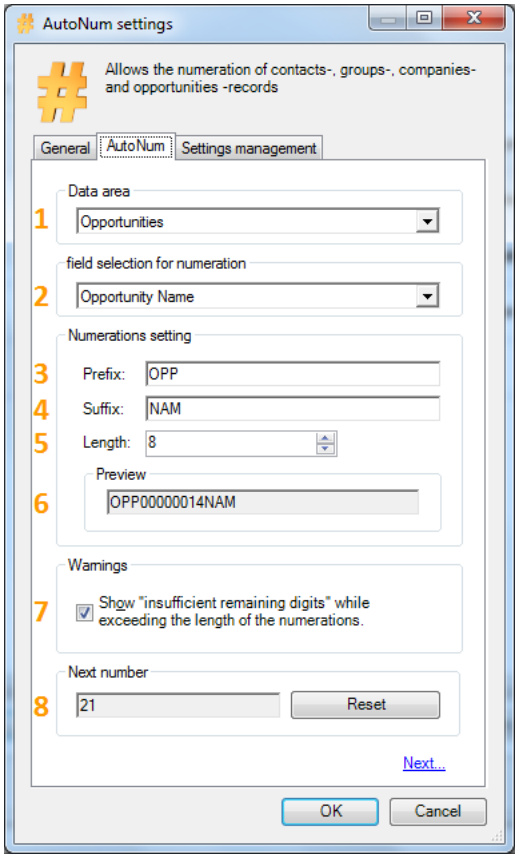
7.1 Introduction

Generating a unique number for Act! record has many advantages:

- You can use the number as a reference key for export /import tasks.
- Give your mailings/documents unique IDs, in order to assign replies more quickly.
- Create customer dossiers with corresponding numbers.
- Create unique project IDs (especially useful for Opportunities).

These thoughts led to the development of **AutoNum** for Act!

7.2 Configuration of AutoNum



1. Set the main entity (contacts, companies, groups, opportunities)
2. Select the field which will contain the number values.
3. Set a prefix (optional).
4. Set a suffix (optional).
5. Set the number of digits for the number value.
6. Preview the selected parameters.
7. This checkbox enables a warning in case the selected number of digits is exceeded.
8. Next number value is displayed. **Reset** sets the original start value. Please note, this feature will only be available if the function has already been run on your database at least once, on the initial setup the field is greyed out.

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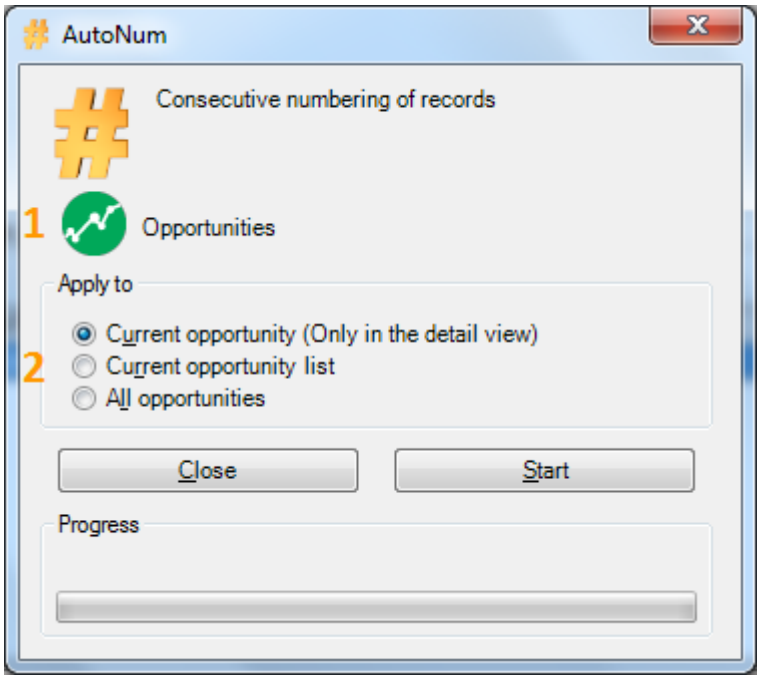
7.3 Using AutoNum in Act!

Running **AutoNum** shows this:



1. Main entity which has the target field.
2. Setting the record selection:
   - Current record
   - Current lookup
   - All records

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8 AutoData command button

8.1 Introduction

Larger CRM solutions often include a separate area which can be customised by changing or adding program code. **AutoData** has been developed to make such facilities available to Act! users.

The possible applications of **AutoData** are many and varied. This VB.NET editor allows you to insert “code-fed” command buttons in the Act! Layout. This provides a degree of flexibility that is limited only by your imagination and programming skills.

Examples include:

- Creating dependencies between Act! fields
  - Enter a Postcode and the correct town will appear
  - Select a value from a dropdown list of a given field; only certain values then appear in the dropdown list of another field, thereby narrowing the possibilities.
- Calculating field contents
  - Perform mathematical operations with the contents of one or more Act! fields and display the result, or write the result to another field.
- Saving the contents of individual fields to the clipboard to allow further processing in other applications.
- Performing a search on all contacts in the same company without having to look up the company record.
- Planning and delegating automated activities.
- Assigning a sequentially numbered name for new sales opportunities.
- Bookmarking contacts so that other Act! users can retrieve the contact.

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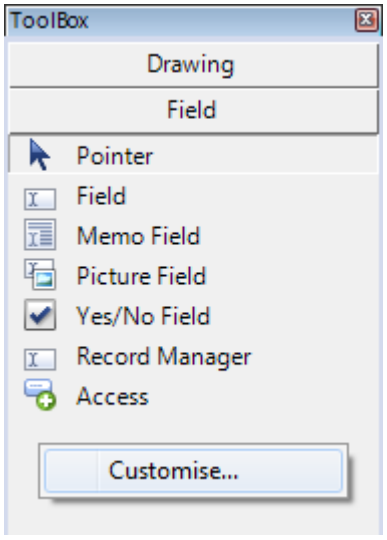
8.2 Integration of AutoData command buttons into your Act! application

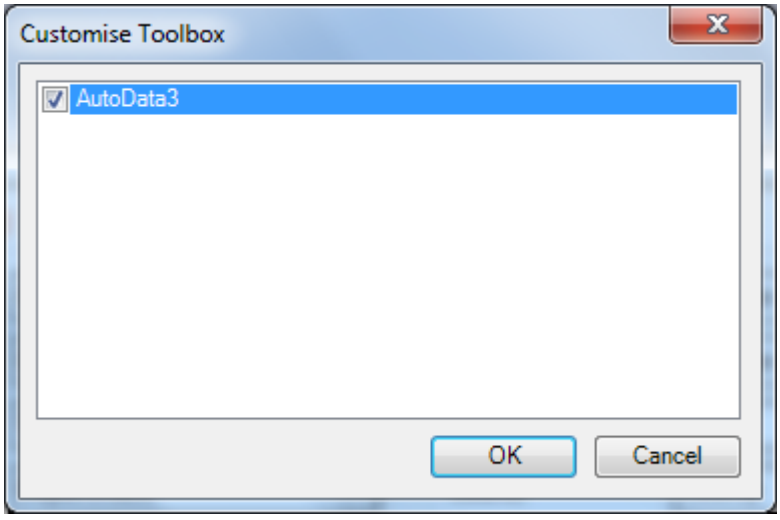
AutoData integrates automatically into Act!.

The activation of the **AutoData** control has to be done once in a database. Open the Act! layout editor via **Tools ➔ Design Layouts ➔ Contact** or **Group** or **Company** or **Opportunity**.

Right-click the grey toolbox and then click **Customize...**:



A window opens in which you just have to confirm the displayed selection **AutoData3** with **OK**.



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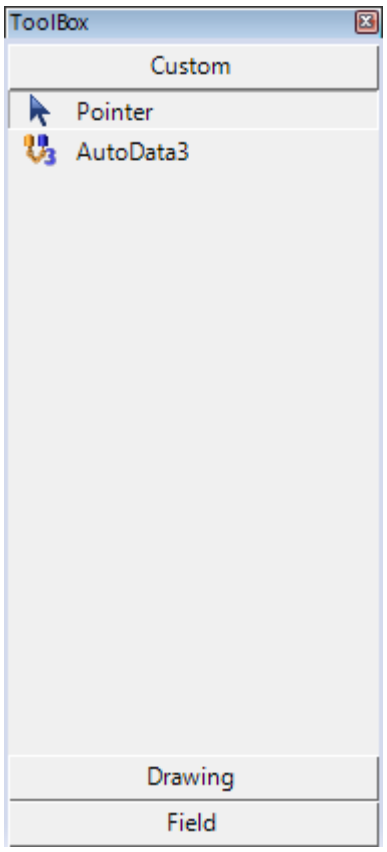
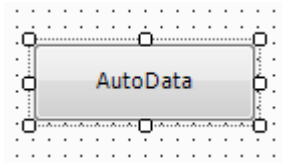
The toolbox will now show the additional button **Custom** .

Click on **AutoData3**.



An **AutoData** command button can now be added to the layout.



The properties (explained below) of the **AutoData** command button can then be viewed in the layout designer by making sure the Properties Window is being viewed (**View ➔ Properties Window** or press **F4** on your keyboard) and then clicking on the **AutoData** button.

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8.3 Configuration of AutoData

The configuration of **AutoData** basically involves two steps which you only need to perform once and are described in more detail below.

8.3.1 Specify input and output values

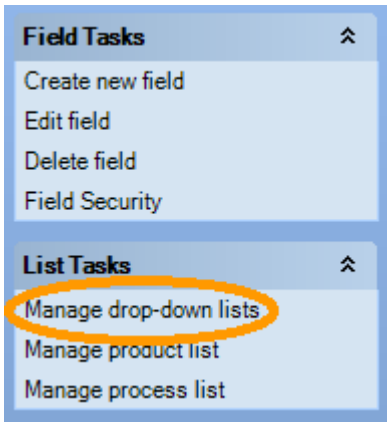
The **AutoData** command button which we will set up will do the following:

We will have a field called "Contact Status" which will have a dropdown list with 3 values: Customer, Supplier, Partner.

A Customer has either A-status, B-status or C-status. A Supplier supplies either Services, Software or Marketing. A Partner is either Business, Corporate or Reseller.

Using the command button after having set the field "Contact Status" to one of the 3 values will open ONLY the matching list, dependent on the first value chosen. The field "Detail" will be filled with a matching value.

8.3.1.1 Step 1



A specially "formatted" dropdown list is required to make this workable. It has to be created first. Go to **Tools ➔ Define Fields** and select "Manage Dropdown lists". Create a new list, preferably starting the name with "Autodata…" PLEASE NOTE – This dropdown will not be assigned to a field, it will be used later on as we will see below.

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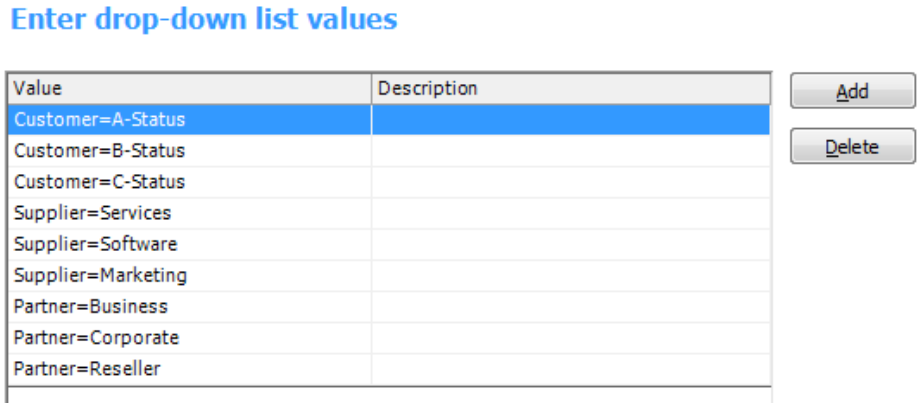
8.3.1.2 Step 2

Create List values



Both input AND output values are included in the list of values linked by the fixed, predefined character "="

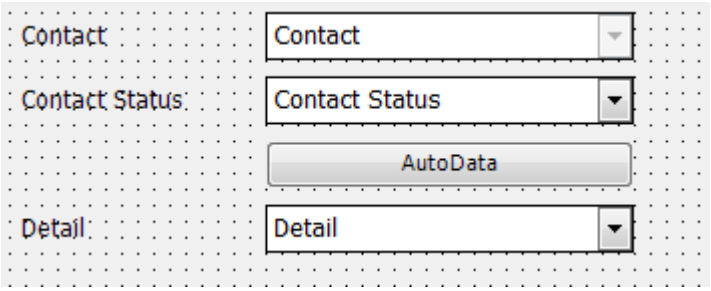
8.3.1.3 Step 3

Create Fields and Add to Layout

You now need to create a field called “Contact Status”. As advised earlier, this will be a standard field with a dropdown listing the following three values: Customer, Supplier and Partner.

You also need to create a standard field called “Detail”, which we will use to populate with the Output.

Finally, an AutoData button needs to be added. Once these fields have been created and added to your layout, you should have something similar to the below screenshot:



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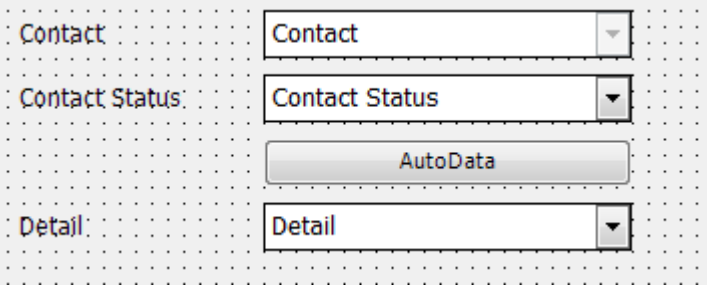
8.3.2 Specifying the behavior of the command button

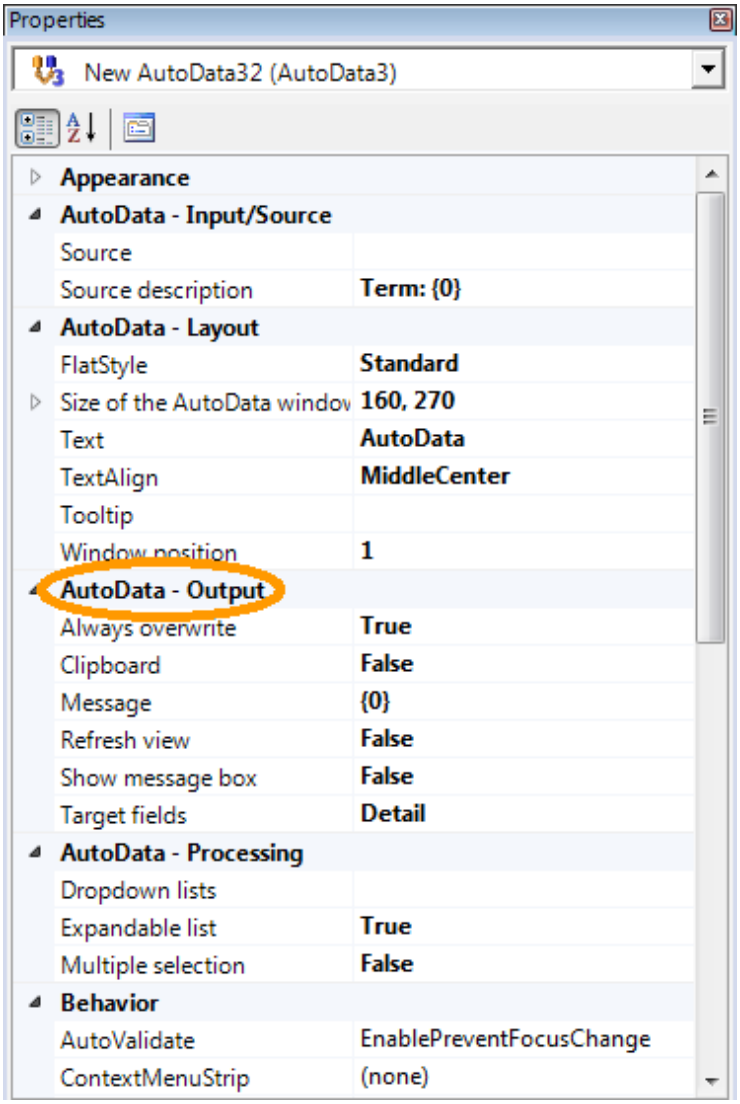
In addition to the input and output values, the AutoData command button has other properties to control the actual "action" provided by the button.



The "action" will be this: If an input value has been set for "Contact Status", pressing the button will display ONLY output values of the matching type in the **Detail** field.

8.3.2.1 Properties: AutoData – Output

Using the **F4** key opens the **Properties Window**. Click on the **AutoData** button to see its properties.



➔ **MESSAGE:** Shows this text message if the parameter "Show message box" is "T**rue**". The optional parameter **{0}** shows a result from the **AutoData** property area "S**ource**".

➔ **ALWAYS OVERWRITE:** if set to "**True**", an existing value in the target field will be overwritten.

➔ **SHOW MESSAGEBOX:** if set to "**True**" the text from "**MESSAGE**" will be displayed.

➔ **TARGET FIELDS** Enter the name(s) of the target field(s). In our example this is the field "Detail".

➔ **CLIPBOARD:** The output value provided by **AutoData** is copied to the clipboard. As it is possible to use formats and formulas in the source field, this can be used to fill the clipboard with information to be processed further (outside of Act!).

This function replaced the previous Act! addon "**ContactCopy**".

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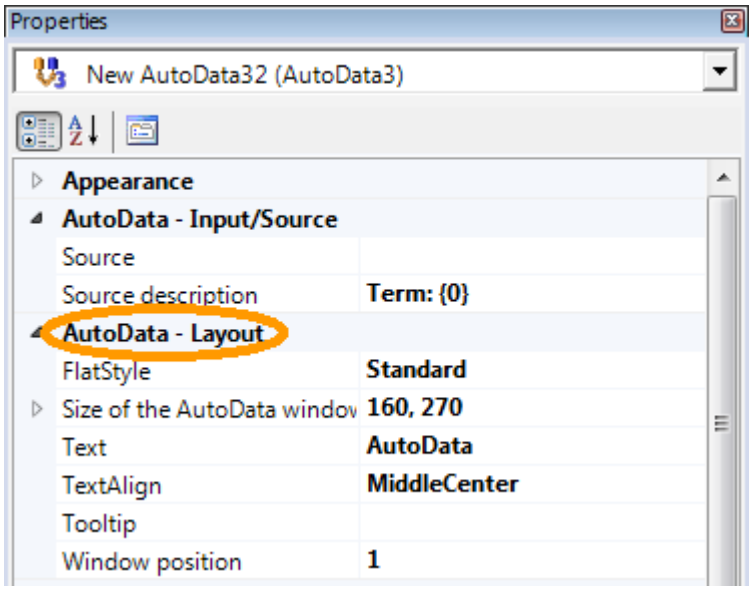
8.3.2.2 Properties: AutoData - Layout



➔ **WINDOW POSITION**: changes the position of the corresponding dropdown list in relation to the command button

➔ **FLATSTYLE**: different styles of the button itself.

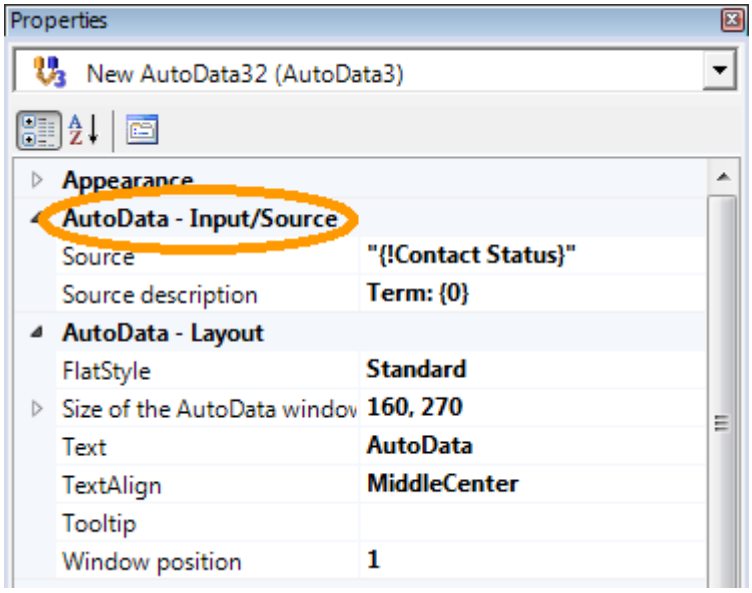
➔ Size of the **AUTODATA WINDOW**: width and height of the button.

➔ **TEXT**: The label that appears on the button itself

➔ **TEXTALIGN**: text position of the button text.

➔ **TOOLTIP**: text entered is shown on a yellow background as you move the mouse over it.

8.3.2.3 Properties: AutoData - Input



➔ **SOURCE DESCRIPTION**: headline of the source field dropdown list.

➔**SOURCE**: source field name, in our example this is the “Contact Status” field.

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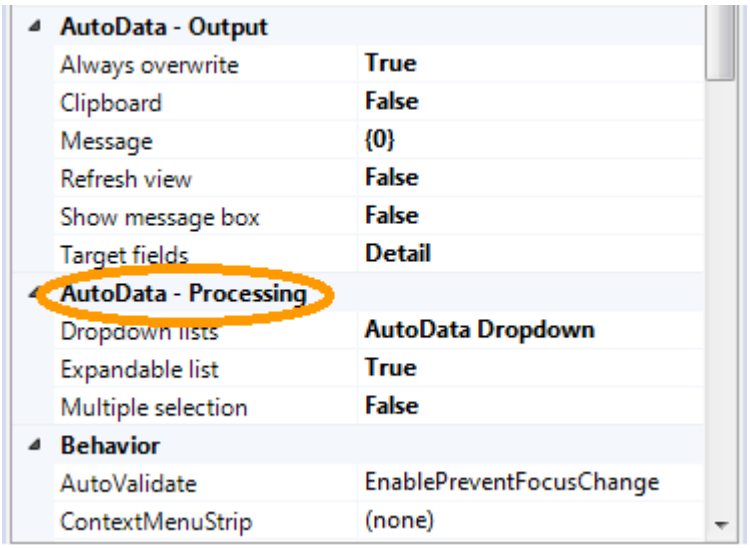
8.3.2.4 Properties: AutoData – Processing



➔ **DROPDOWN LIST**: name of the dropdown list created initially for our example. **TIP**: If more than one name is set here, a list of all available dropdown lists will be shown first.

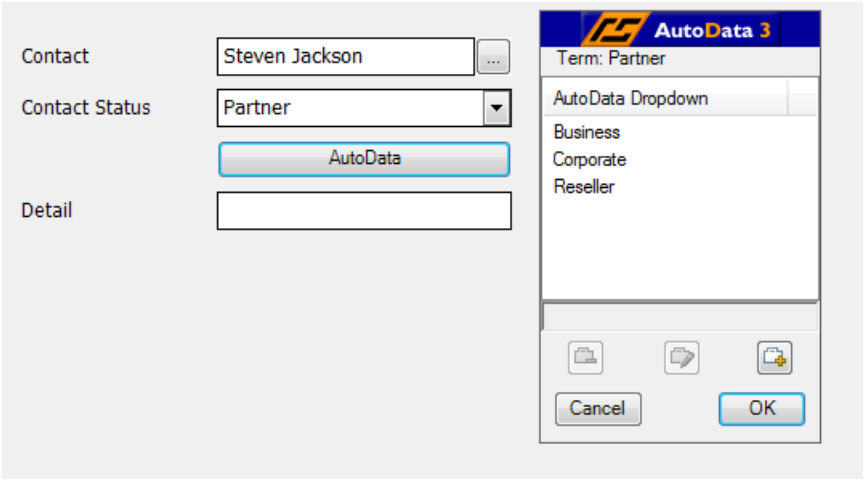
➔ **EXPANDABLE LIST:** dropdown list becomes editable if "True".

➔ **MULTIPLE SELECTION**: dropdown list allows selection of more than one value from the list if set to "True".

The values are separated by a semicolon.

8.3.3 Using the AutoData command button in Act!

After having selected the value "Customer" for the field "Status", using the command button will show the following picture:



The **AutoData3** button opens the dropdown list now showing ONLY the matching values based upon the first selection "Partner" and will only allow you to use those values.

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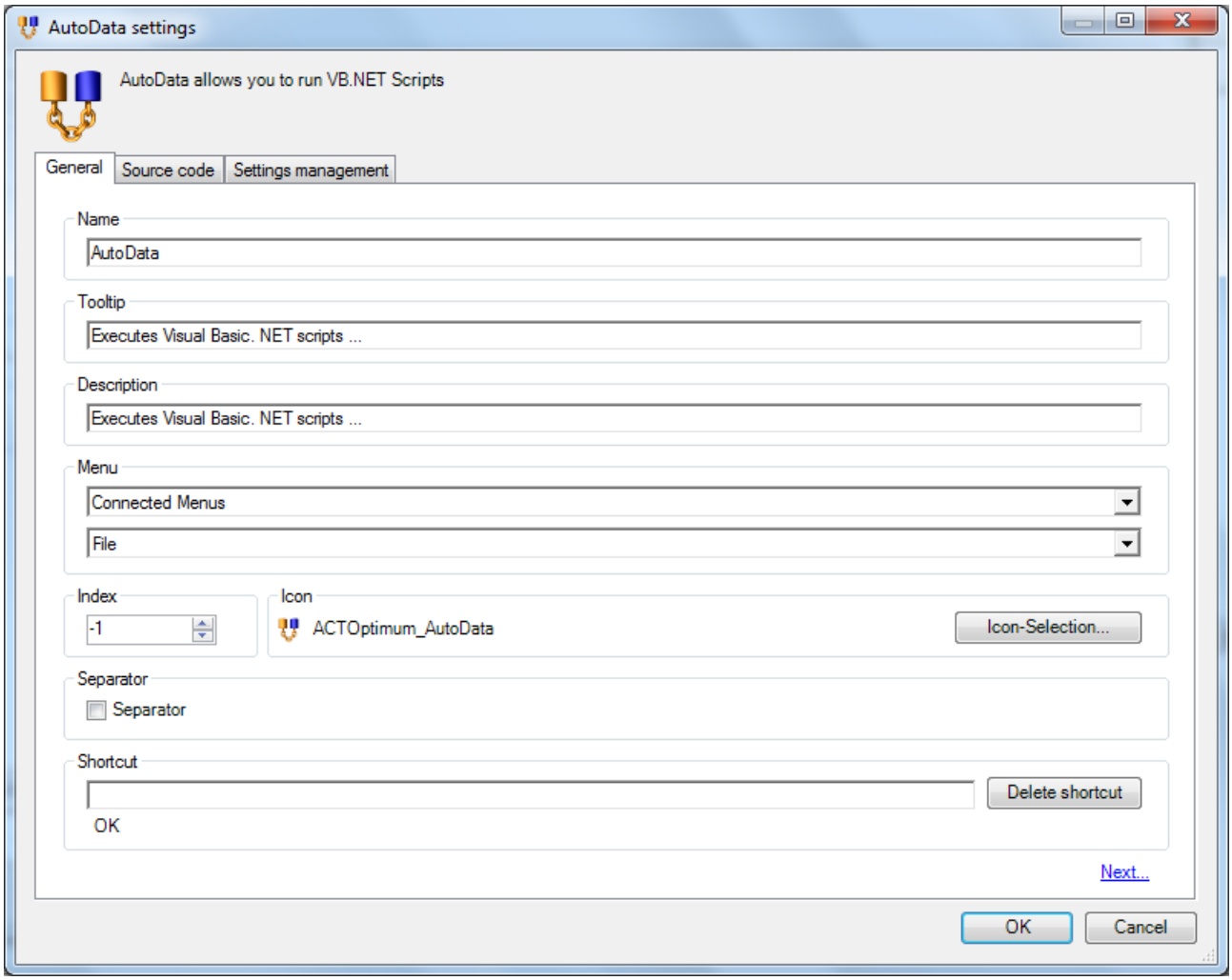
9 AutoData in menus and toolbars

9.1 Introduction

The first way of using **AutoData** via command buttons has certain limitations, as VB.NET scripts can only be executed via a layout. To be able to use scripting independently, a second way of using **AutoData** is available. As an example, the ACTOptimum+ standard setup will insert a command button icon for the external application **TipTap** (see 14.2.1) into the contact detail toolbar.

9.2 Configuration of AutoData in menus and toolbars

Create an **AutoData** tool bar icon using ACTOptimum+ settings as described in 4.1.
On the **General** tab an additional parameter "Icon" becomes available.



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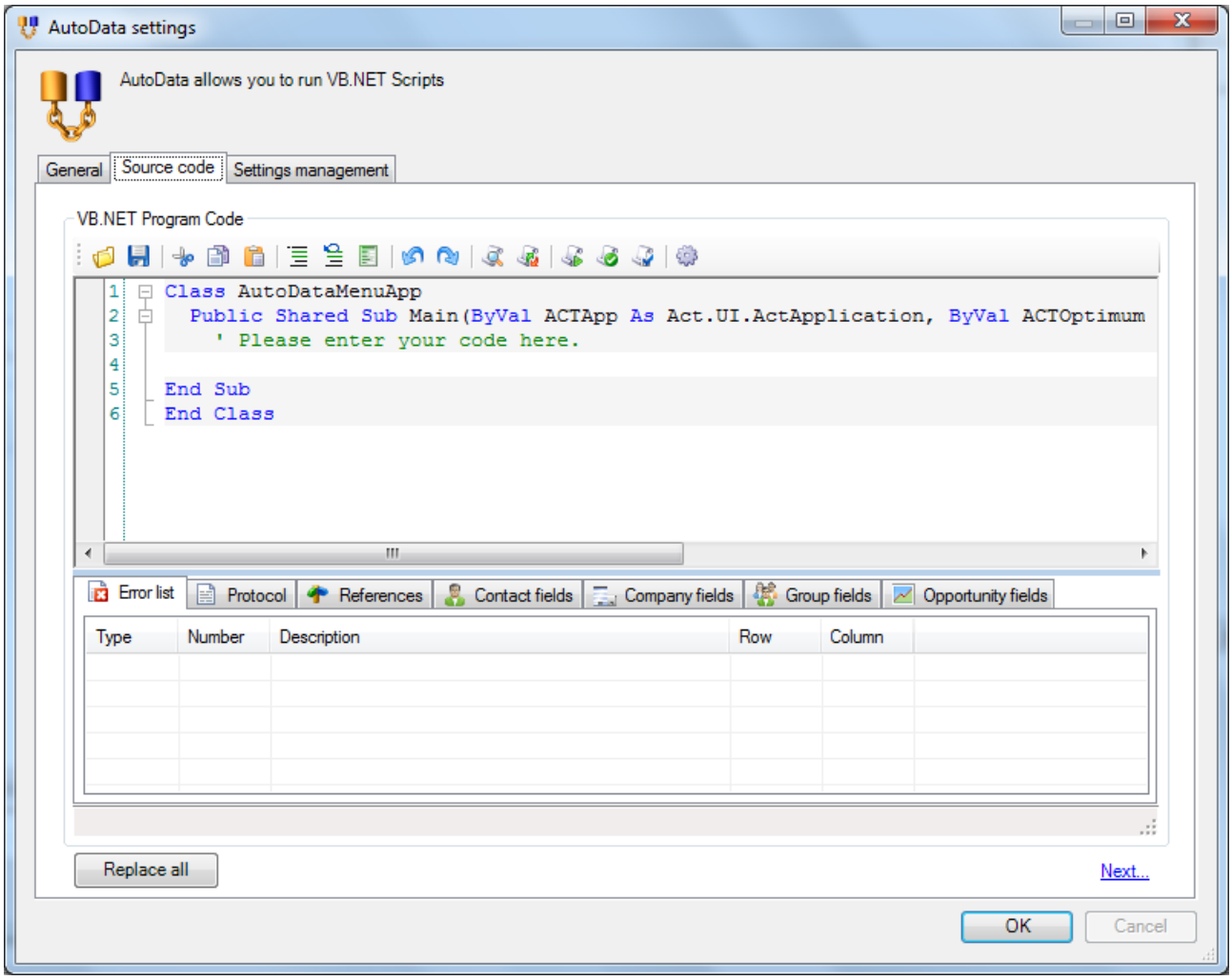
The **Source code** tab is the place to enter your VB.NET code.



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10 RadiusSearch

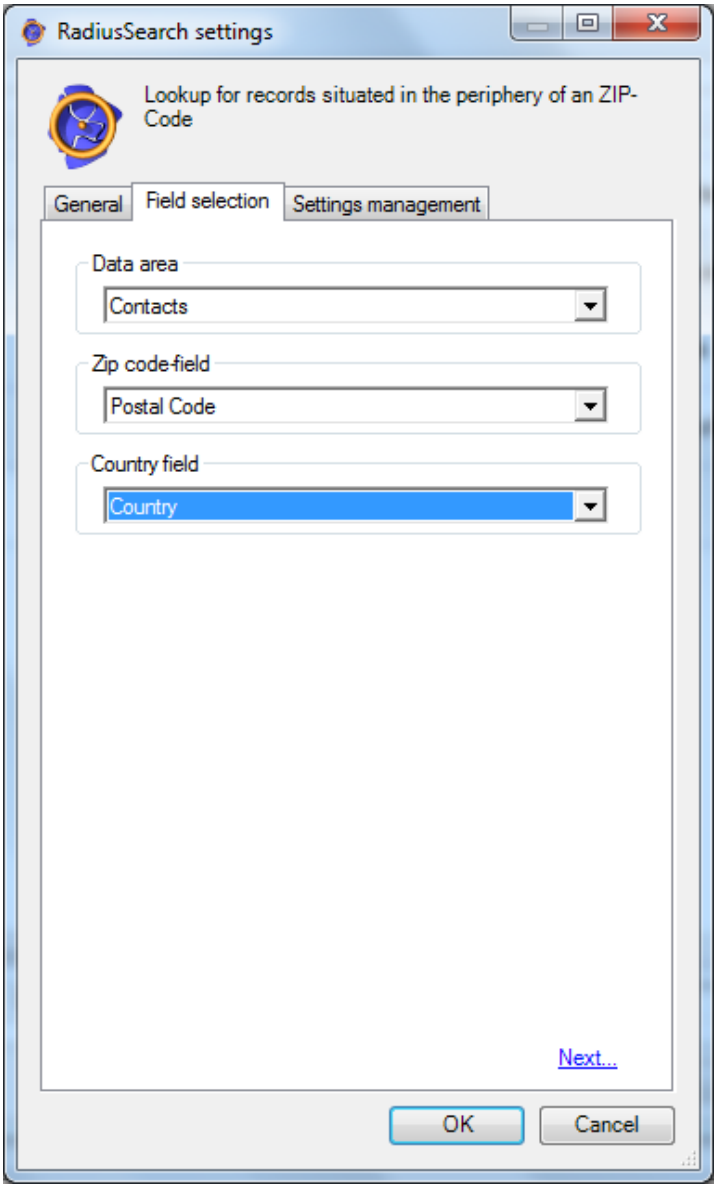
10.1 Introduction

Now that GPS data is used everywhere – in navigation systems, Internet services, route optimisation, etc. – it was a logical step to include this technology in Act!.

When planning visits, it makes sense to show all the other customers located near where you're going, or to select a target group of contacts located within a reACTasonable journey of a planned event.

These thoughts led to the development of the ACTOptimum+ function "**RadiusSearch**".

10.2 Configuration of RadiusSearch



The following parameters can be set for **RadiusSearch**:

Data area
Define the Act! main entity to be searched in.

ZIP code-field
Name of the database field containing the ZIP code.

Country field
Name of the database field containing the country name.

Note: More than one **RadiusSearch** can be set up per database, having different parameters.

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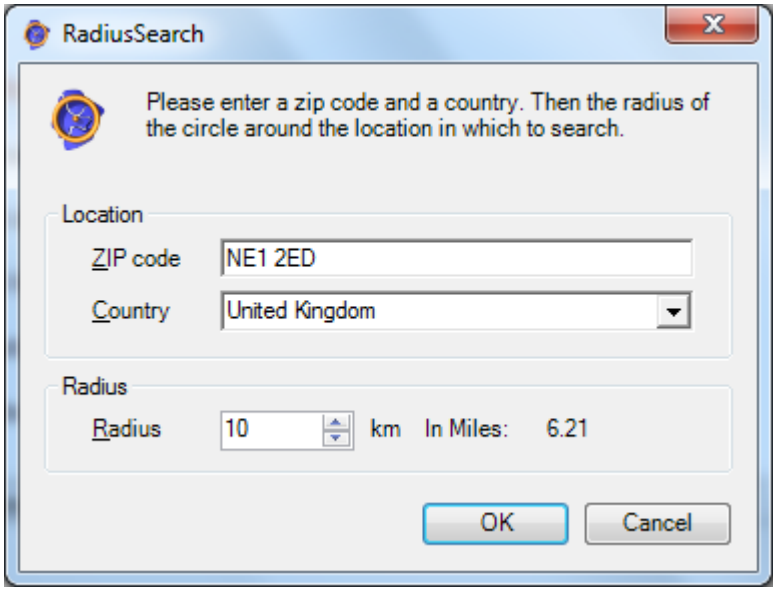
10.3 Using RadiusSearch in Act!

Using the function displays the following dialogue:

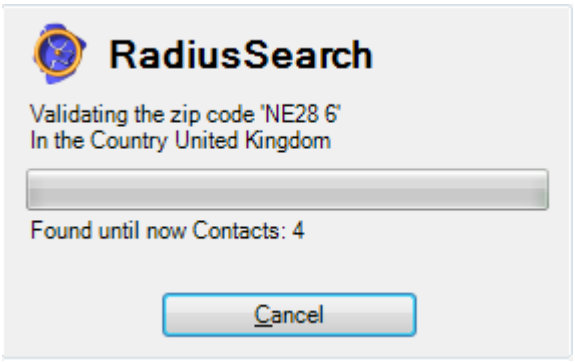


The defaults for the Zip code and country will be taken from the current contact/company. Note: The quality of the lookup results is dependent on correct values for the Country field.

The geodata database delivered with ACTOptimum+ currently includes German and English names for following countries : Germany (Deutschland), Austria (Österreich), Switzerland (Schweiz), Liechtenstein (Liechtenstein), Belgium (Belgien) and the USA (Vereinigte Staaten).

The radius around a given ZIP code can be any value between 3 and 1000 kilometers.

Clicking **OK** opens the progress window:



After a few seconds **RadiusSearch** will display a lookup. Please watch the status bar!

You can then apply any additional lookups to narrow or add to your search as normal.

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11 ActPlus

11.1 Introduction

From Act! 12.0 upwards, there are four separate main data areas: **Contacts – Companies – Groups – Opportunities.** At the next level down, the following sub-data areas are provided as standard: **Notes – History – Activities**.

Quick and user-friendly navigation and linking of individual information units (Notes, History, Activities) to the higher-level main data areas (Contacts, Companies, Groups, Opportunities) has been regarded as a key priority.

With its special jumping and linking capabilities, **ActPlus** greatly enhances speed and ease of use in the day-to-day running of your Act! application.

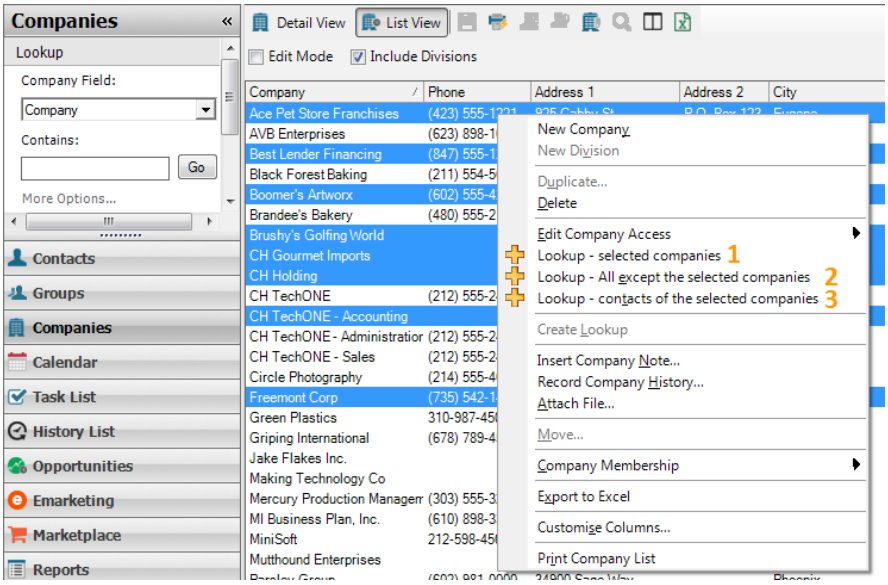
11.2 Configuration of ActPlus

No options for **ActPlus**.

11.3 Using ActPlus in Act!

11.3.1 Extended lookup menu for companies and groups

ACTPlus - lookup enhancements are provided for company list and group list views.



1 **Lookup – selected companies** Lookup highlighted company list entries.

2 **Lookup – omit selected** Lookup all companies except highlighted ones.

3 **Lookup – contacts of selected companies** Creates a lookup of all contacts linked to the selected companies as a contact list.

The status bar (bottom line of the application window) shows the number of matching company records.

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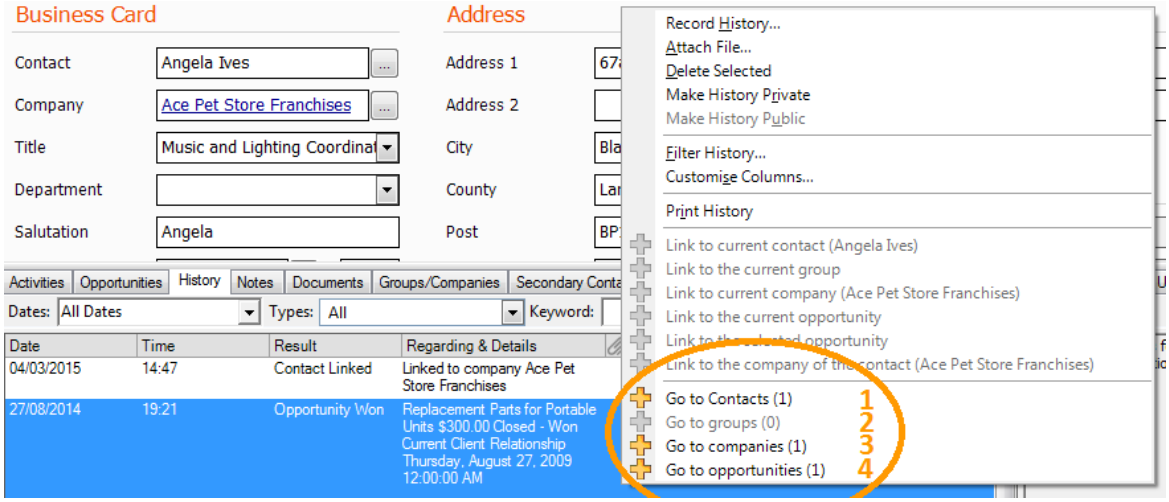
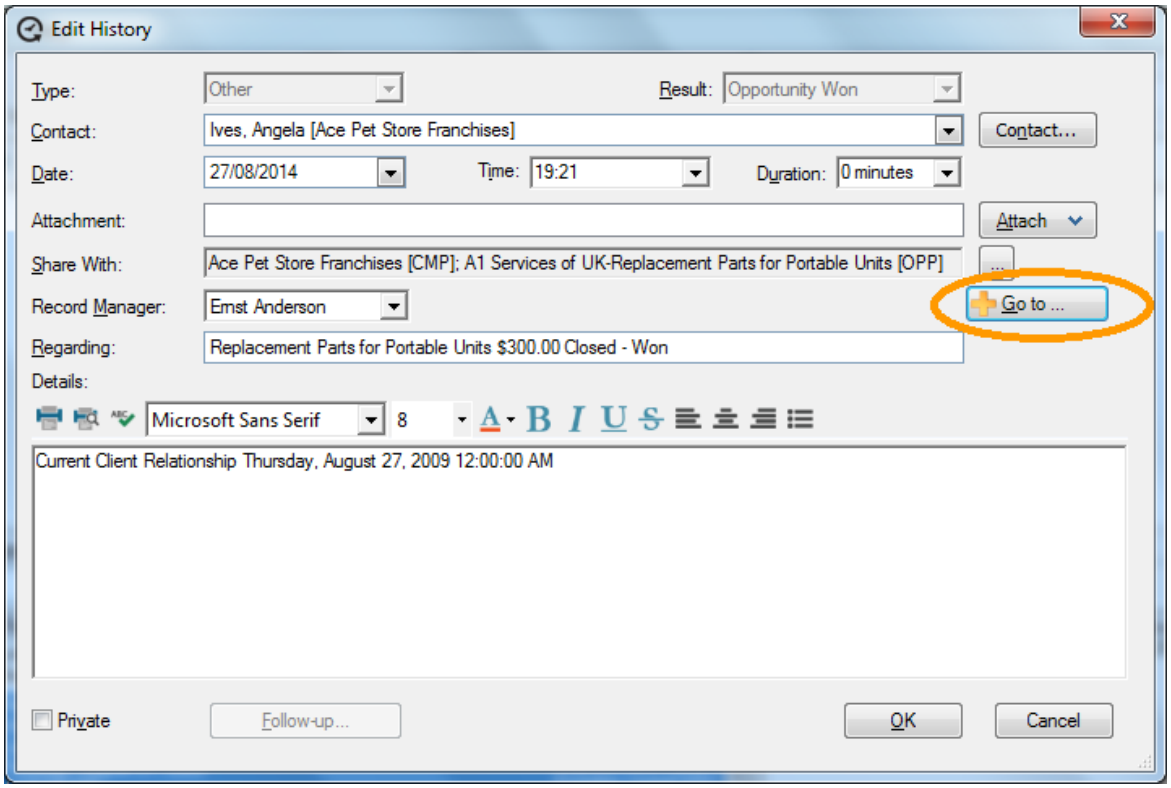
11.3.2 Additonal navigation shortcuts in notes and histories

The context menu of a selected note or history contains 4 additional **ActPlus – Go to** items.



1. **Go to contacts** – creates a lookup of all related contacts of this history
2. **Go to groups -** creates a lookup of all related groups of this history
3. **Go to companies** - creates a lookup of all related companies of this history
4. **Go to opportunities** - creates a lookup of all related opportunities of this history

The two dialog boxes for **Edit History** and **Edit Note** will show a new button named **Go to...**.



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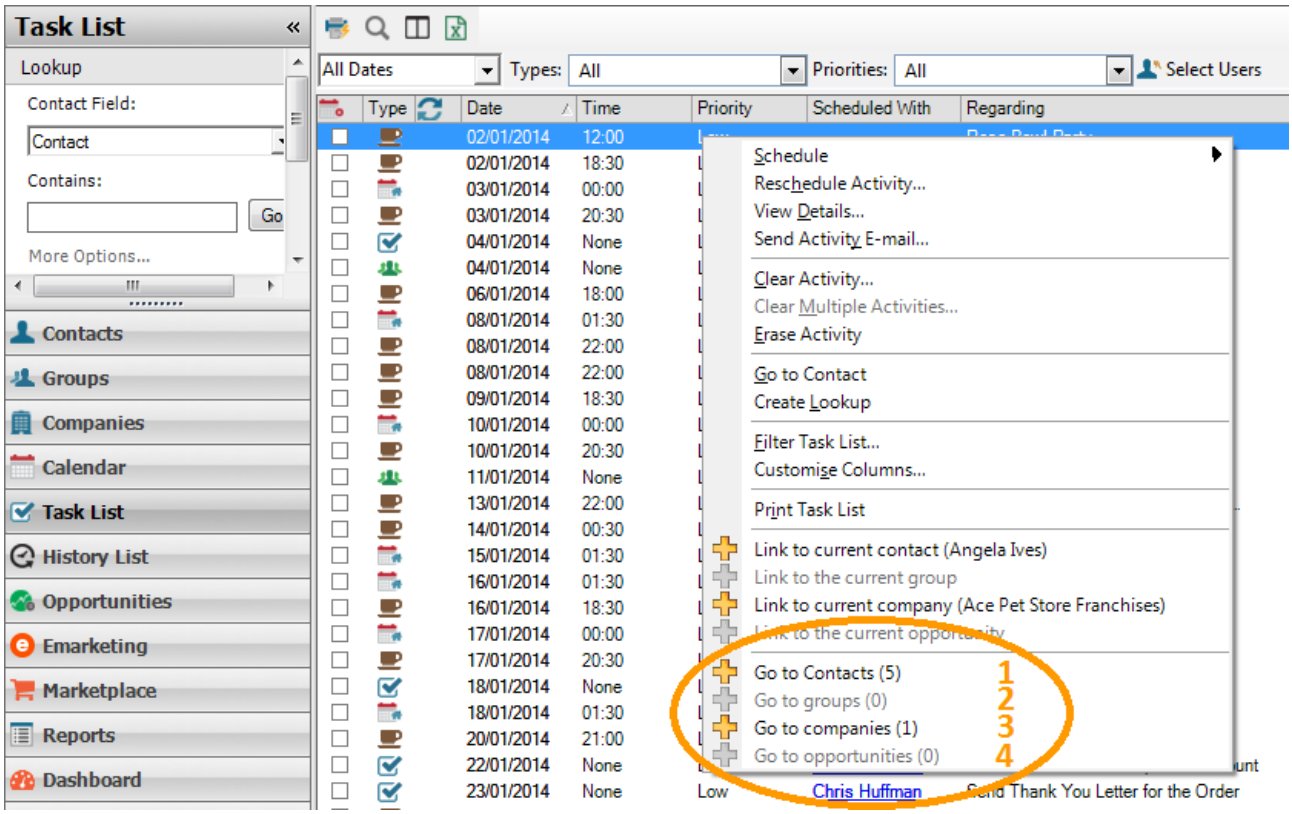
Clicking the button wil open a new context menu allowing you to go directly to a linked contact, company, group or opportunity.

11.3.3 Additonal navigation shortcuts in activities

The context menu of an activity will show additional menu items allowing you to perform direct lookups of linked contacts, companies, groups or opportunities.



1. **Go to contacts** – creates a lookup of all contacts linked to this activity.
2. **Go to groups** – creates a lookup of all groups linked to this activity.
3. **Go to companies** – creates a lookup of all companies linked to this activity.
4. **Go to opportunities** – creates a lookup of all opportunities linked to this activity.

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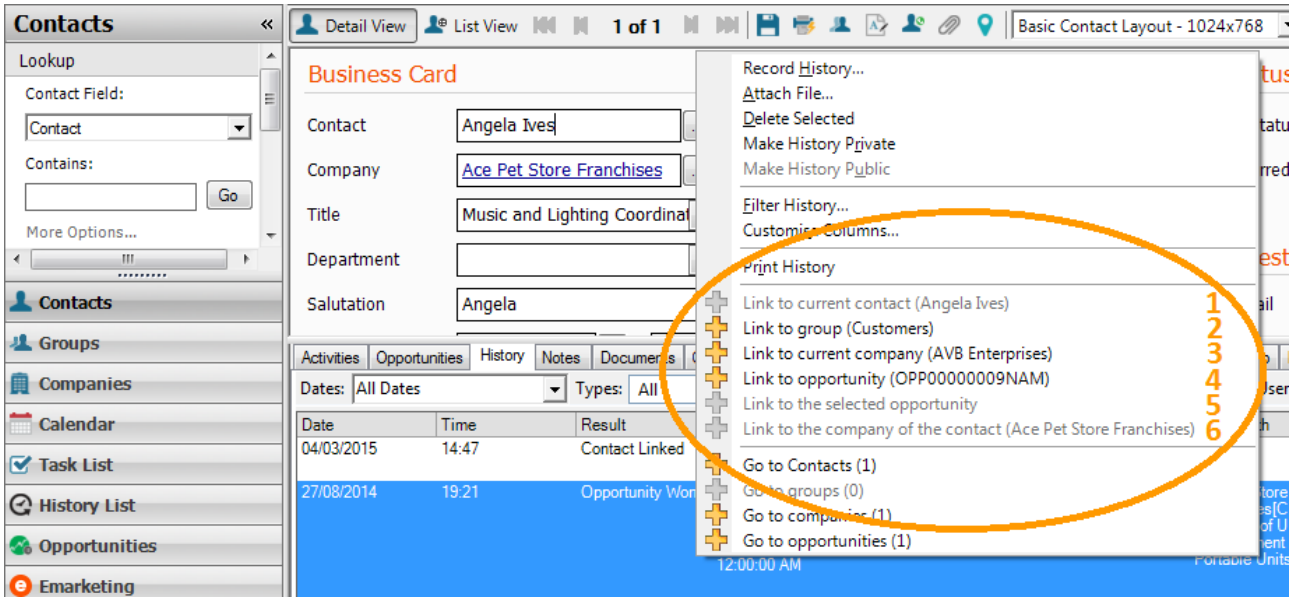
11.3.4 Extended linking options for notes, histories or activities

Some more additions to the context menu will appear if **ActPlus** is enabled.

ActPlus – link to allows you to link a note, history or activity to current contacts, groups, companies or opportunities. The selected item will show "missing links" in black, existing links are grayed out.



1. Link to current contact
2. Link to current group
3. Link to current company
4. Link to current opportunity
5. Link to selected opportunity. Selected opportunity means an opportunity that was previously selected from the list of opportunities on the opportunities Tab of a contact or company by doing one left click (the item is then highlighted in blue).
6. Link to company of the current contact

N.B.: "current" means a contact, group, company or opportunity that is a result of the corresponding previous lookup.

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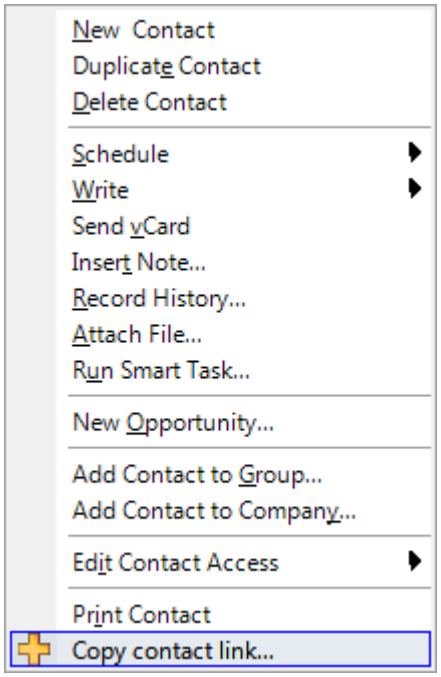
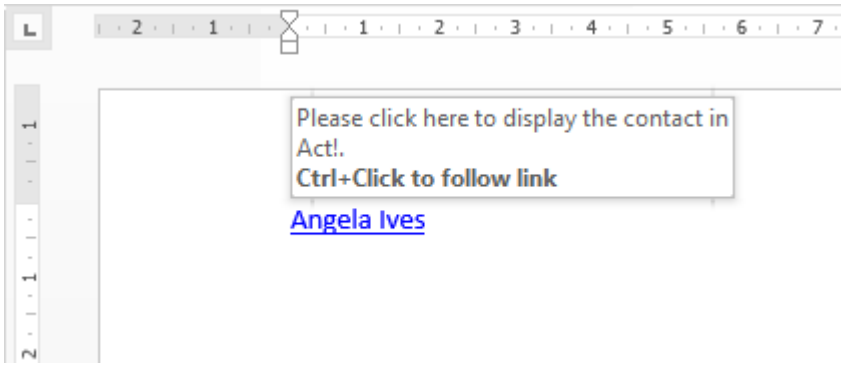
11.3.5 ActRemote-Link

The general context menus of contacts, companies, groups and opportunities contain another addition provided by **ActPlus** and this is called **Copy Link**.



This function copies a link to the selected contact, company, group or opportunity to the clipboard. Inserting this link into Word or Excel will allow you to click the link to open the corresponding Act! record similar to a hyperlink.



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12 ActRemote

12.1 Introduction

ActRemote is an interface technology that enables external COM applications (such as Visual Basic, VBA, VB Script) to communicate with the .NET-based program Act!

In the Act! environment, examples of COM applications include **CustomInfo** and **TipTap**

12.2 Configuration of ActRemote

The basic configuration of ACTOptimum+ has the corresponding item **ActRemote** set to "enabled".
No other settings are necessary.

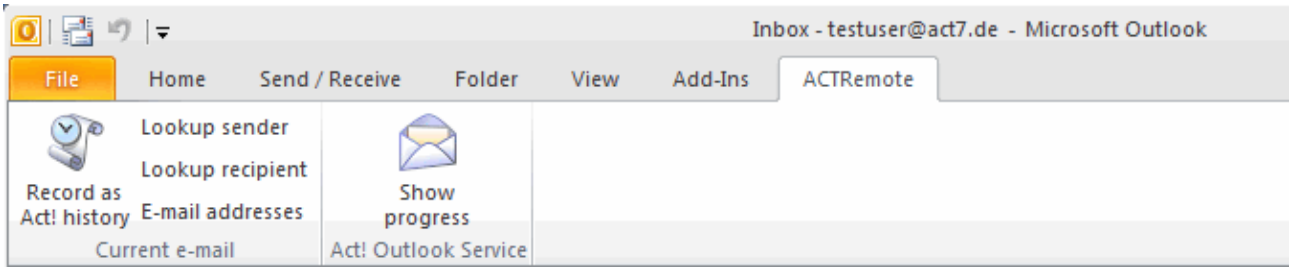
12.3 Using ActRemote in Act!

ActRemote has no "visible" functional items.

12.4 ACTRemote Add-In for Outlook

This Add-In for Microsoft Outlook adds the tab „ACTRemote“ to Outlook. Depending on which window of Outlook you’re currently in, the ACTRemote connector will provide different, new functionality to interact with the Act! software.

12.4.1 The „ACTRemote“ tab in the main Outlook window



12.4.1.1 Icon group „Current e-Mail“

Using these icons you can start a lookup in Act! to search for a contact based on the currently marked email or attach an email to the contact currently active in Act!.

12.4.1.2 Icon „Lookup sender“

Starts a lookup in the Contact area for the email address and, where applicable, the alias of the sender of the currently marked e-Mail.

12.4.1.3 Icon „Lookup recipient“

Allows you to select one of the recipients of the currently marked e-Mail and start a lookup in the Contact area of Act! for that e-Mail address.

12.4.1.4 Icon „E-mail addresses“

Starts a search for all e-Mail addresses in the currently marked e-Mail’s body. You can select one e-Mail from the resulting list. A lookup for the selected e-Mail address will then be started in the Act! Contact area.

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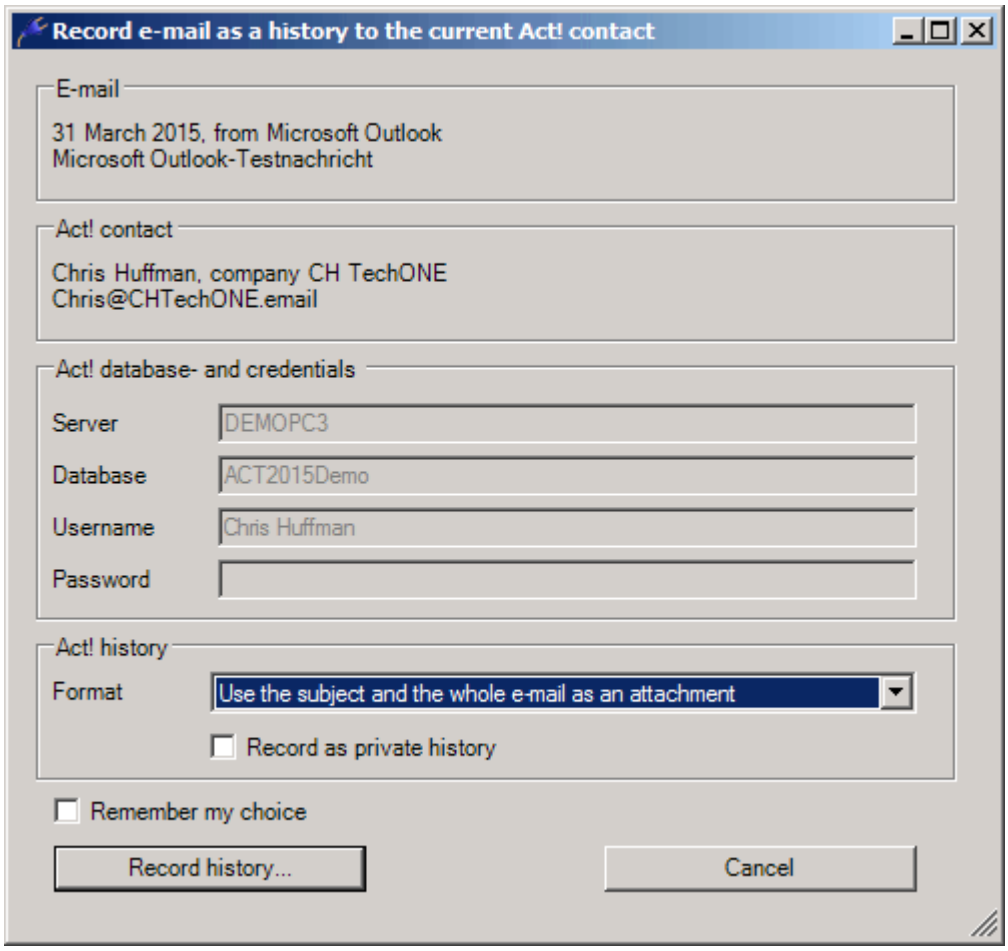
12.4.1.5 Icon „Record as Act! history“

The currently selected e-Mail will be recorded as a history in the currently active contact in Act!. The following dialog will be shown:



This dialog gives you all the relevant information and options to record an e-Mail as a history in Act!. You can select the format in which to record and make the history “private”. By selecting “Remember my choice” the options you selected will be stored as your preferred default and used for the next time you’re recording an e-Mail.

12.4.1.6 Icon group „Act! Outlook Service“

The „Act! Outlook-Service“ is a piece of software running in the background, which is responsible for creating the history items in Act!. Every time an e-Mail gets recorded as an e-Mail in Act!, this program is the one doing the task in the background. It’s part of the Act! software itself and is implemented by the process „Act.Outlook.Service.exe”.

The icon “Show progress” opens the status window of the program. Technically this can be done through the icon in the task bar, but that’s easy to overlook and it’s sometimes hidden by the system. This function will no longer be displayed as of Act! version 20.1.

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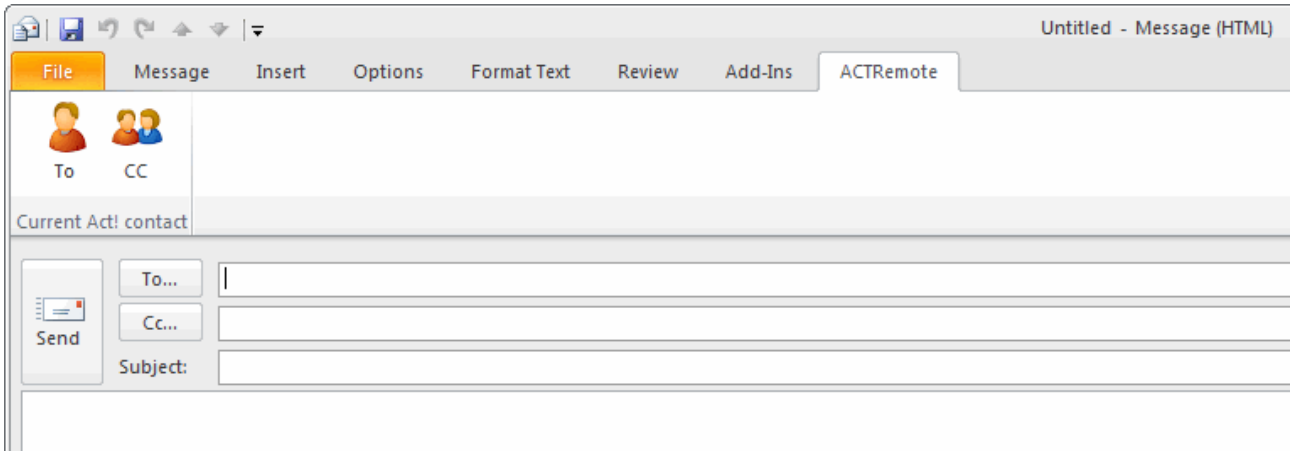
12.4.2 The tab „ACTRemote“ in Outlook’s the E-mail creation window



12.4.2.1 Icon „To“

The e-Mail address of the current contact in Act! will be added to the “To” field of the e-Mail.

12.4.2.2 Icon „CC“

The e-Mail address of the current contact in Act! will be added to the “CC” field of the e-Mail.

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13 BrowserTab

13.1 Introduction

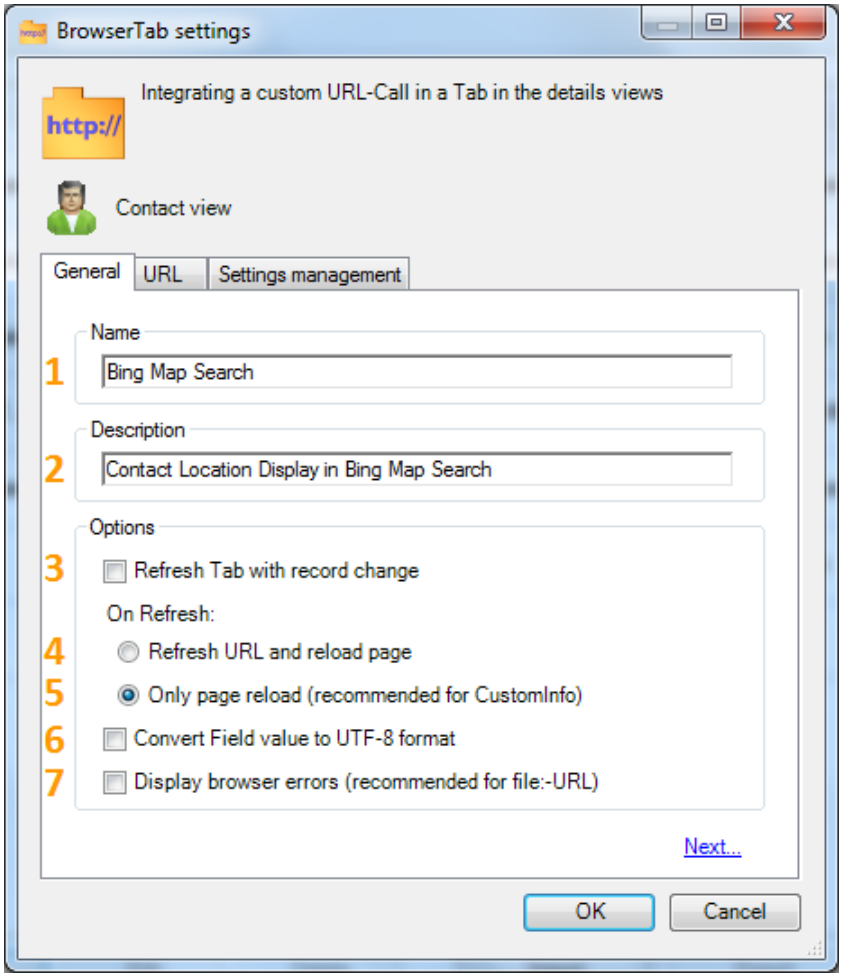
The initial idea of **BrowserTab** was to add custom tabs showing information coming from web services. During the development of this, it became clear that it would also be possible to show any kind of external data as long as the data comes "through" a web browser (Example 2 will show this).

Besides that, **BrowserTab** is also the "display interface" for **CustomInfo.**

BrowserTab can be confgured to "read" Act! field contents, paste them into a URL and display the contents of a web page based upon the pasted criteria. Example 1 will show how to do this.

13.2 Configuration of BrowserTab

13.2.1 General Tab



1 Tab name for the new Internet service.

2 Tab description

3 Enabling this option will refresh the Tab contents when changing the record in Act! This can have a negative impact on the Act! performance, so should be tested if it is to be used.

4 If the above refresh option is set, the URL will be refreshed and the browser Tab will reload.

5 If the above refresh option is set, this option will only reload the page.

6 Enabling the UTF-8 format ensures that special characters in the copied field contents (such as Ä, Ö, Ü etc.) are transferred correctly.

7 Will show browser errors.

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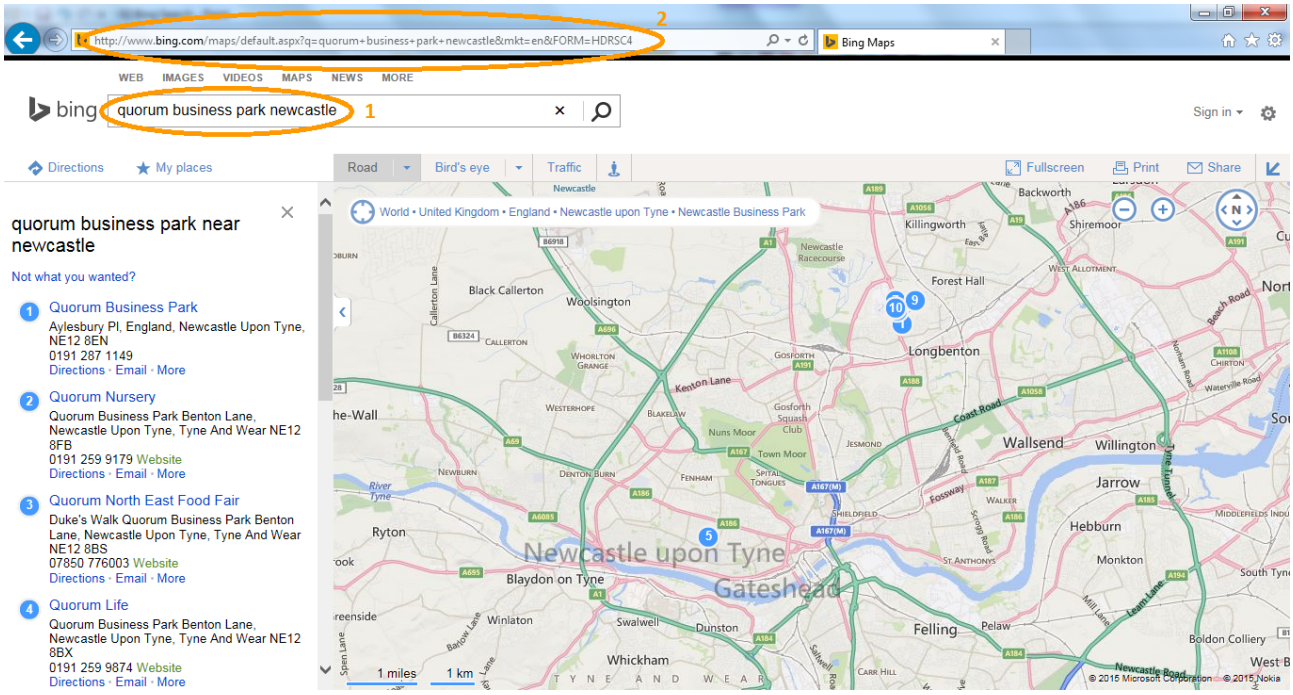
13.2.2 Tab - URL

Before linking a new URL with an Act! tab, first call up the URL in your web browser.

In the following example we use Bing Maps as an illustration.

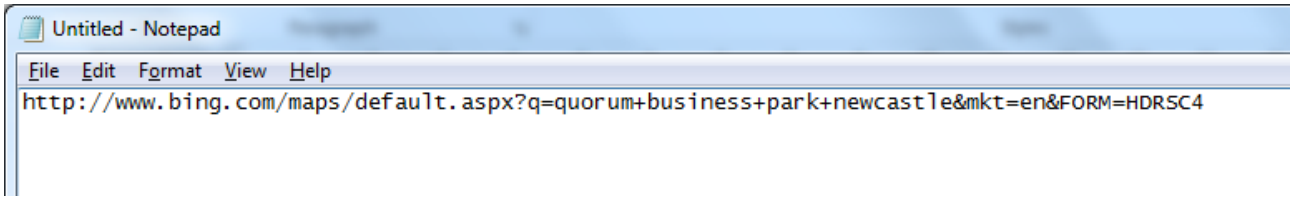
13.2.2.1 Step 1 (preparatory step in web browser)

Enter the URL: **www.bing.com/maps** in your web browser to go to Bing Maps, then perform any standard search (in the example below, we have searched for the location of the Swiftpage Office in the UK)



1. The Internet service searches for the two entries. The entries for these two search fields can be found in the URL for the Internet page.
2. The URL can then be copied elsewhere. Note that it contains the two search terms we have used ("Quorum Business Park" and "Newcastle").

The displayed address with the relevant information is now copied to the clipboard. It might be useful to copy it into Microsoft Notepad:



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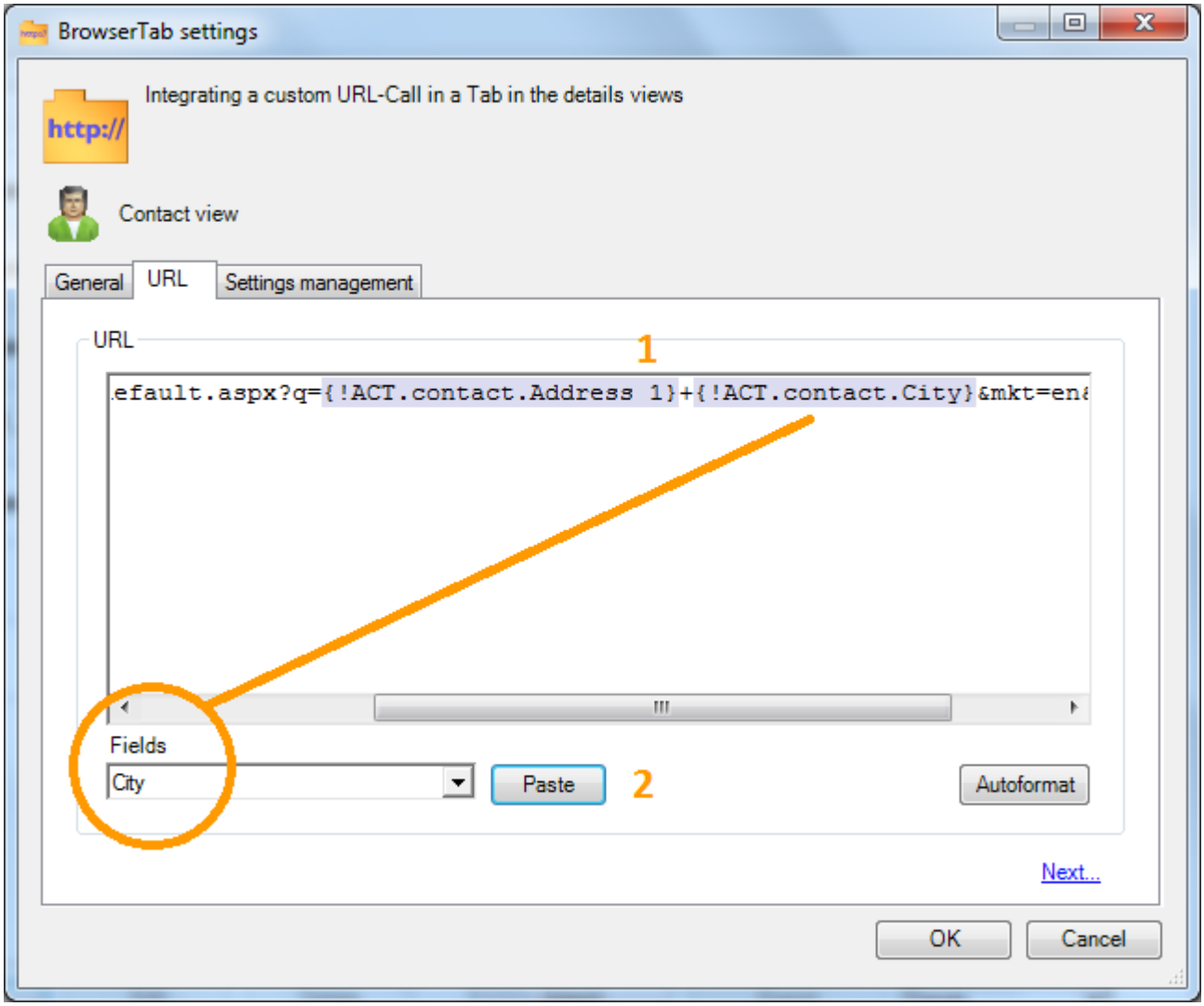
13.2.2.2 Step 2 (configure the URL in BrowserTab)



You now take the URL content you copied to the clipboard and paste it into the URL area of the configuration window.

1 Here is the URL that has been pasted in. Note that the Search terms we used before have now been replaced with Act! fields.

2 This dropdown allows you to access any of your Act! fields and use these to replace your search terms. So now, instead of specifically searching for “Newcastle”, the BrowserTab will search for the city in the Contact record you are looking at. We will see this demonstrated below.

The fixed search terms of your URL in the clipboard

- Quorum Business Park
- Newcastle

are now replaced with a special syntax that is automatically generated when you Copy in the appropriate Act! fields (in this case, “Address 1” and “City”)

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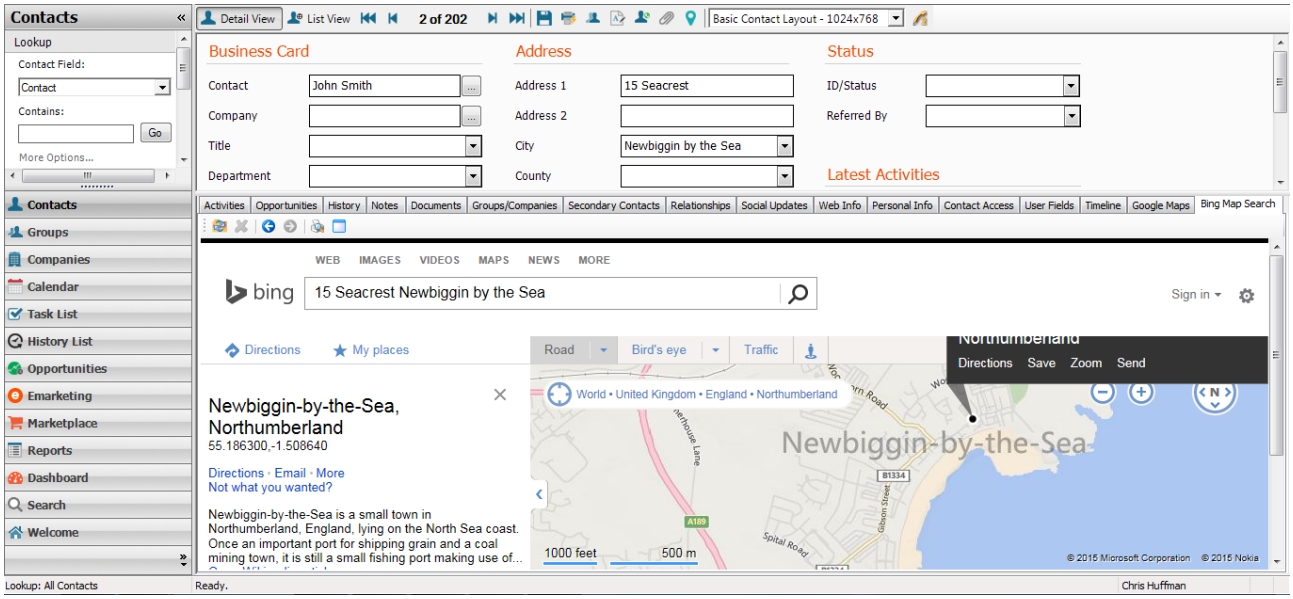
13.3 Using the BrowserTab

13.3.1 Example 1 (dynamically updated Internet service)

After your new syntax has been stored, the new tab appears in your Act! application, offering you instant access to the newly embedded URL.



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13.3.2 Example 2 (display Windows Explorer folders)

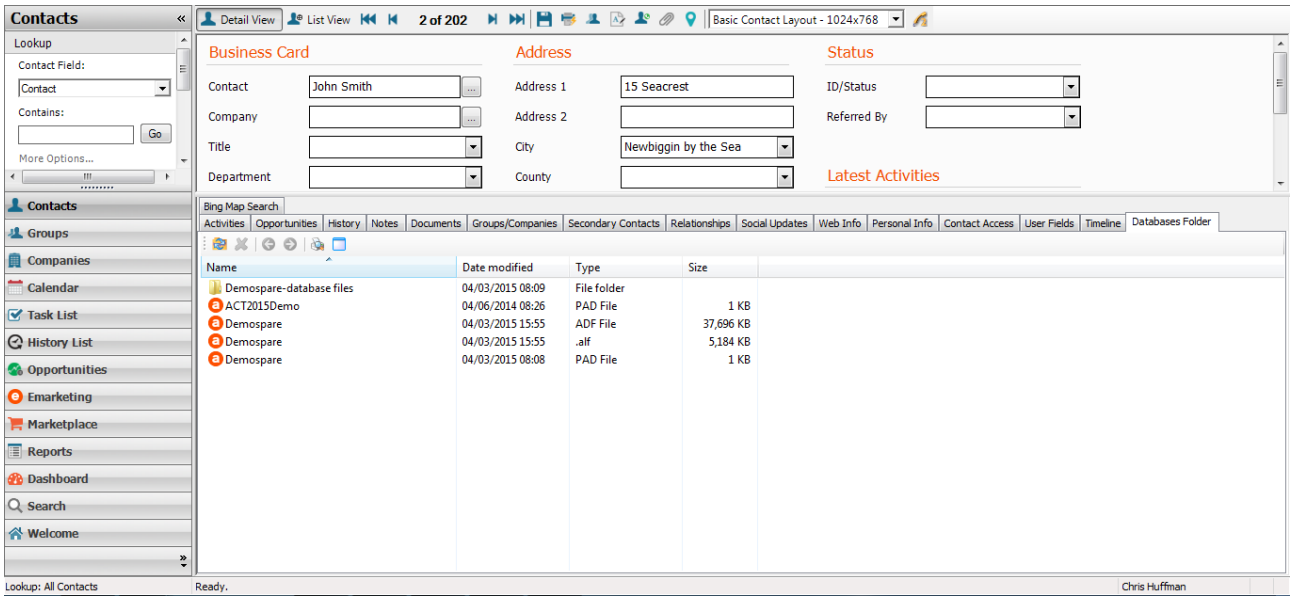
It is also possible to use **BrowserTab** to display the contents of a shared folder.

To do this you will require the UNC path of your shaered folder (so this will be displayed in the format \\COMPUTER NAME\FOLDER NAME). You can then set up a BrowserTab as per the above instructions, but when pasting in your URL, you will instead paste in the UNC path.

In the example below, I have used the UNC path of my shared databases folder (On my PC, this is \\NCL-10000071\Databases).

You can also use the Windows environment variables like %userprofile% in the URL.

URL example: file://%userprofile%\MyProjects\



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14 TipTap

14.1 Introduction

Whilst a telephone link does already exist within the Act! System, TipTap expands on the existing functionality and provides additional useful features, such as call recognition and call history recording.

These were the main priorities during the development of TipTap:

- Caller identification via all telephone fields stored in Act!, also based on probability (when caller calls from extension) and displays in a separate window (Call Monitor).
- Ability to pinpoint the calling contact in Act!.
- Logging of callers in a caller list, to be able to search for the contact at a later time.
- Logging of additional information relating to each call (e.g. date, time, duration, country, city, call status) and saving in an Access database for later analysis.
- Logging of call in the Act! history directly from within TipTap.

14.2 Configuring TipTap

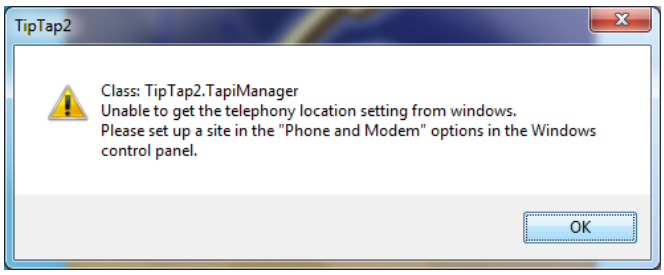
TipTap is an external application and has a separate configuration process.

14.2.1 Step 1 - Integration of TipTap into Act!

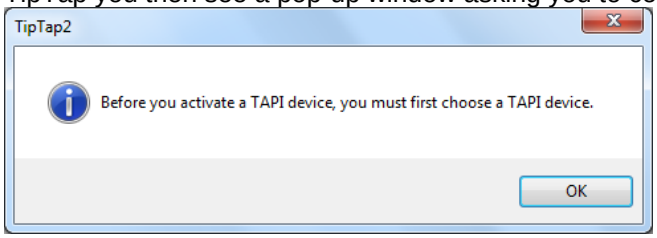
After **ACTOptimum+** has been installed, launch the application via

All Apps ➔ Melville_Schellmann ➔ ACTOptimum+ ➔ TipTap

PLEASE NOTE: You must set up your “Phone and Modem” settings within the Windows Control Panel before setting up TipTap. If you do not, when you attempt to launch the program, you will receive the following error:



If you click OK, or if you have already completed the Phone and Modem details correctly before you launch TipTap you then see a pop-up window asking you to confirm the choice of installed TAPI driver.



Confirm by clicking **OK**

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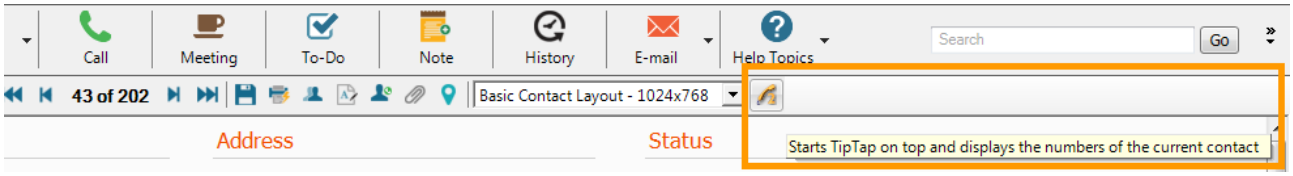
Note: Another way of starting TipTap is through the Act! application. The contact detail view has a new button for calling up TipTap.



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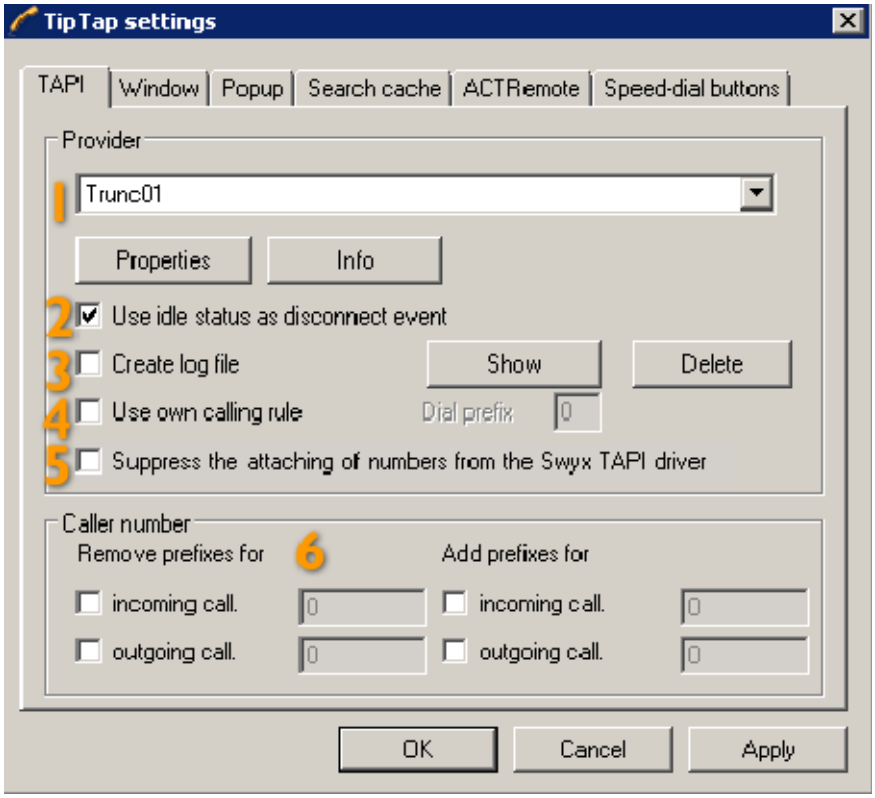
14.2.2 Step 2 - TipTap settings – TAPI selection

Once you have clicked OK to the previous message, the following dialogue screen is displayed.



Select the corresponding TAPI driver for the telephone handset you are using.

The remaining TAPI settings are:

1 Choice of TAPI driver and possibility of changing some of the settings. The “Infos” button displays all the TAP functions supported by the driver.

2 If the end of your call is not recognized (no duration is displayed), in many cases it helps for the idle status of the TAPI driver to be interpreted as “Disconnected”. This ensures the correct duration of the call is displayed.

3 For the analysis of problems with a TAPI driver, all TAPI events can be recorded in a log file and this can then be displayed or deleted.

4 If TipTap is to ignore the Windows dialing rules (System control – Telephone and modem options), you can enable the option **Use own calling rule** here and specify a prefix that will always be put in front of any number being dialed.

5 In case a TAPI driver from the manufacturer Swyx is used, it may happen that the TAPI driver adds some digits into the Tel no. This special option attempts to “cure” the inherent problem of the driver by trying to find the bogus digits and removes them. In case the function has rectified the Tel no. the “Memo” column of the main window will display the change.

6 If the phone numbers in the table above (call history) are not displayed correctly, you can adjust this by adding or deleting prefixes. For example: in the incoming calls field, the TAPI driver lists the number of the caller like this “004012345”. If you enable **Remove prefixes while** and **incoming call** then enter zero, the number will be displayed correctly as “04012345”. In this way it is possible, depending on whether the call is incoming or outgoing, to add or remove as many characters or digits as you like.

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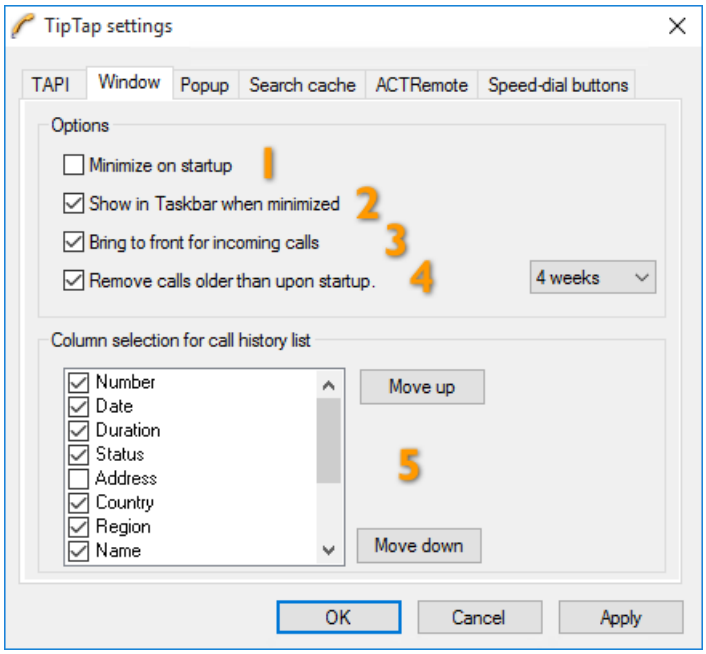
14.2.3 Step 3 - TipTap settings – window view

In the **Window** tab you specify the program behavior and various display options.



1 Defines whether the application is minimized immediately on starting.

2 Specifies whether **TipTap** is displayed in the toolbar.

3 Here you choose whether **TipTap** should be brought to the foreground on incoming calls.

4 Here you can define the age at which entries in the call history are to be deleted. This automatic deletion process is performed on every start or everytime the search cache of **TipTap** is refreshed.

5 Choose information that you want **TipTap** to display for every call. The information copied and subsequently available depends on the TAPI driver used. Use the **Move up**, and **Move down** buttons to specify the order in which the call information is displayed.

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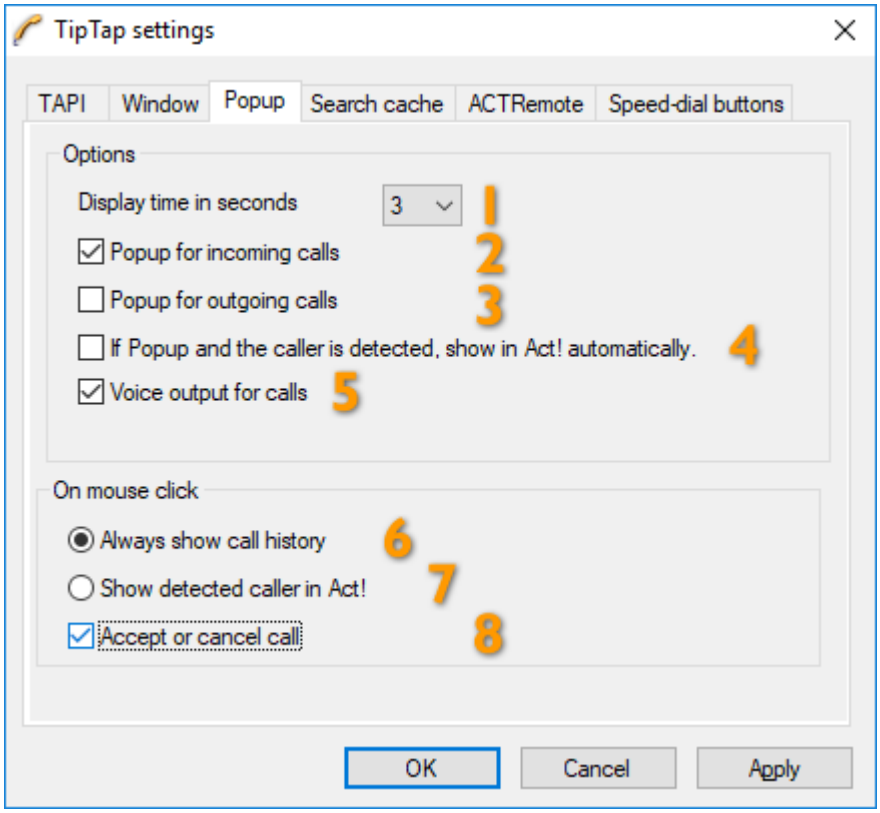
14.2.4 Step 4 - TipTap settings – Popup view

In the **Popup** tab other options can be set for the way in which TipTap is initiated for incoming calls. The popup window appears at the bottom right edge of the desktop and shows information about the call.



1. Defines how long the pop-up window is displayed for.
2. If this box is checked, a pop-up window appears bottom right for incoming calls.
3. With this box checked, a pop-up window appears bottom right for outgoing calls.
4. If the pop-up appears and an Act! contact has been recognised, this contact is automatically displayed in Act!.
5. When the pop-up window is displayed, the caller is output via Windows own speech synthesizer.
6. Clicking on the pop-up window displays the call history.
7. Clicking on the pop-up window searches for the incoming contact in Act! and puts it on the screen immediately. This is assuming that caller recognition is enabled in the Act! application.
8. If you click on the pop-up window, the incoming call is accepted.

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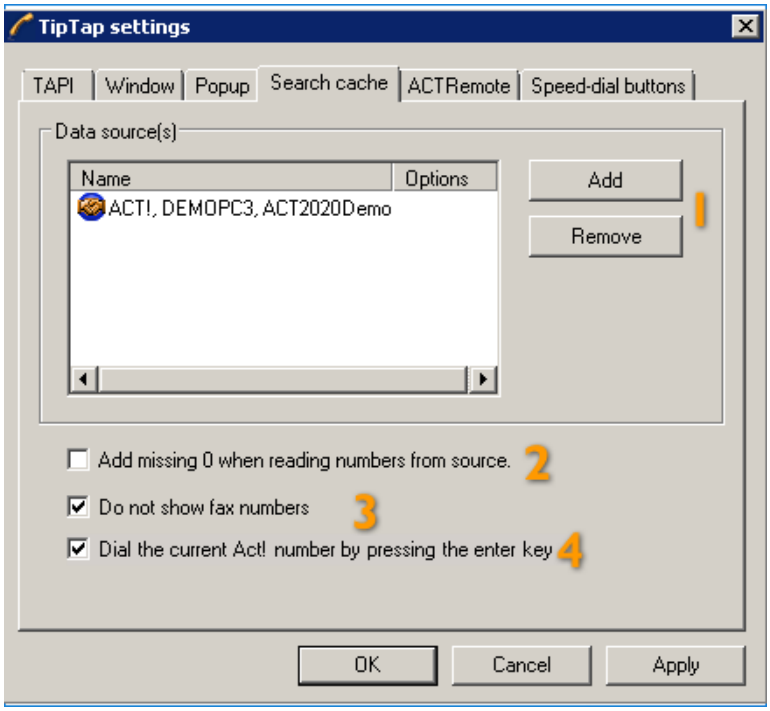
14.2.5 Step 5 - TipTap settings – Search Cache

In the **Search cache** tab you can specify one or more Act! databases whose telephone fields will be used for caller recognition purposes. Act! reads all the phone numbers from the Act! database into a search cache in the computer's memory.



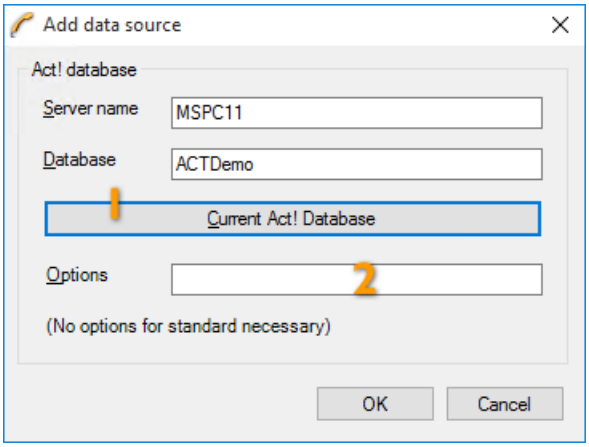
1 Clicking on the **Add** button opens a popup window for entering an additional Act! database. Click on **Delete** to delete an Act! database from the search cache.

2 Use this option if the initial zero is not entered in the dialing codes for phone numbers in the Act! databases (40… instead of 040…). A leading zero will then be added to these numbers, so that an incoming number such as "040…." can be located in the search cache.

3 Activate this option if you don't want to see fax numbers of the current Act! contact.

4 If the telephone numbers of the current Act! record are displayed in the lower area of the TipTap window (search cache), double-clicking or pressing the Enter key for a selected entry will dial this number and not display the record in the Act!(Standard).

If you want to add additional databases as data sources, simply enter the respective server name of the stored database, along with the name of the Act! database.



1 If you have the actual Act! program opened, you can add the database you are currently using into TipTap by clicking the **Current Act! database** button. To use this, the **ActRemote** function must be enabled in the **ACTOptimum+** settings.

2 Under options you can enter:
ACTCompanyFieldRecordLocation=DIVISION

Explanation: Specifies an alternative Act! company field if the REGION field was deleted.

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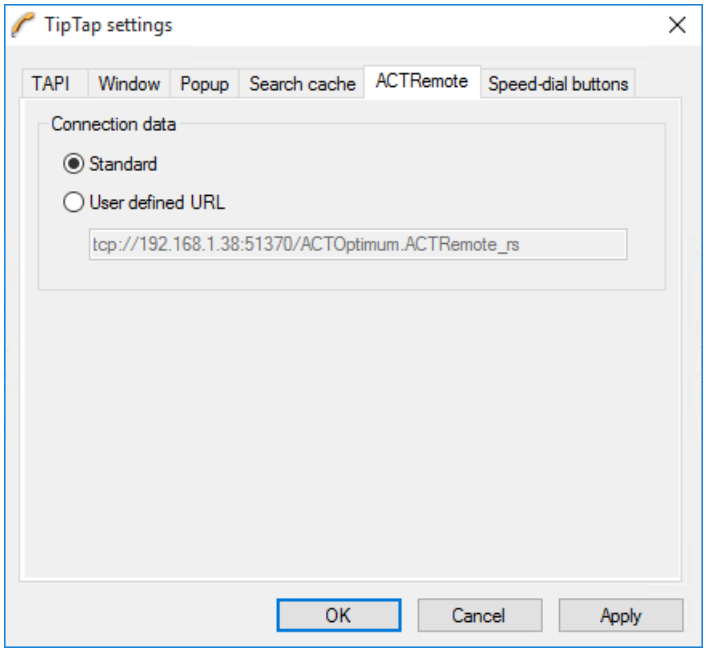
14.2.6 Step 6 - TipTap settings – ActRemote

In the penultimate tab, the link to the Act! application is set. You do not usually need to change anything here.



The link to the Act! application is needed to

- ✓ Perform a search on the calling contact in the Act! application.
- ✓ Create a call history for the caller in the Act! application.
- ✓ Display the phone numbers of the current Act! contact.

To ensure a smoothly functioning link to the Act! application, please make sure that the **ACTOptimum+** function **ActRemote** has been enabled in the basic **ACTOptimum+** settings.

The user-defined setting is only required if you want to access an Act! database that is located on a terminal server. More information can be found in the **ActForum.de** under:

http://www.melville-schellmann.de/actforum/viewtopic.php?t=4417

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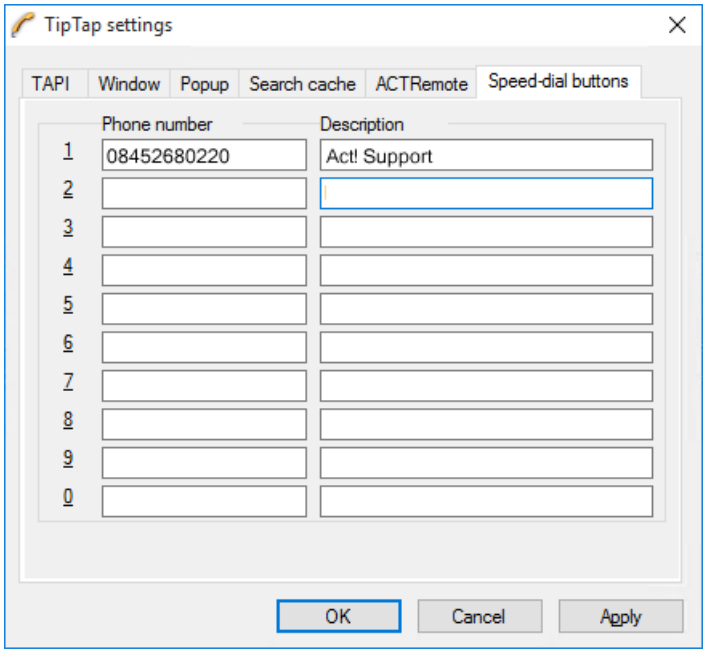
14.2.7 Step 7 - TipTap settings – Speed dial keys

In the last tab of the **TipTap** configuration you can assign phone numbers for up to ten speed dial keys (0-9).



In the left column enter the phone number and in the right column a description. Every complete entry leads to an additional icon with the respective number being displayed in the toolbar in the main window of TipTap. You can then click on this icon to call that phone number.

Once you have completed these 7 steps, save your configuration setting by clicking on **OK**.

TipTap now automatically reads the available phone numbers into the search cache and brings the application up in the foreground.

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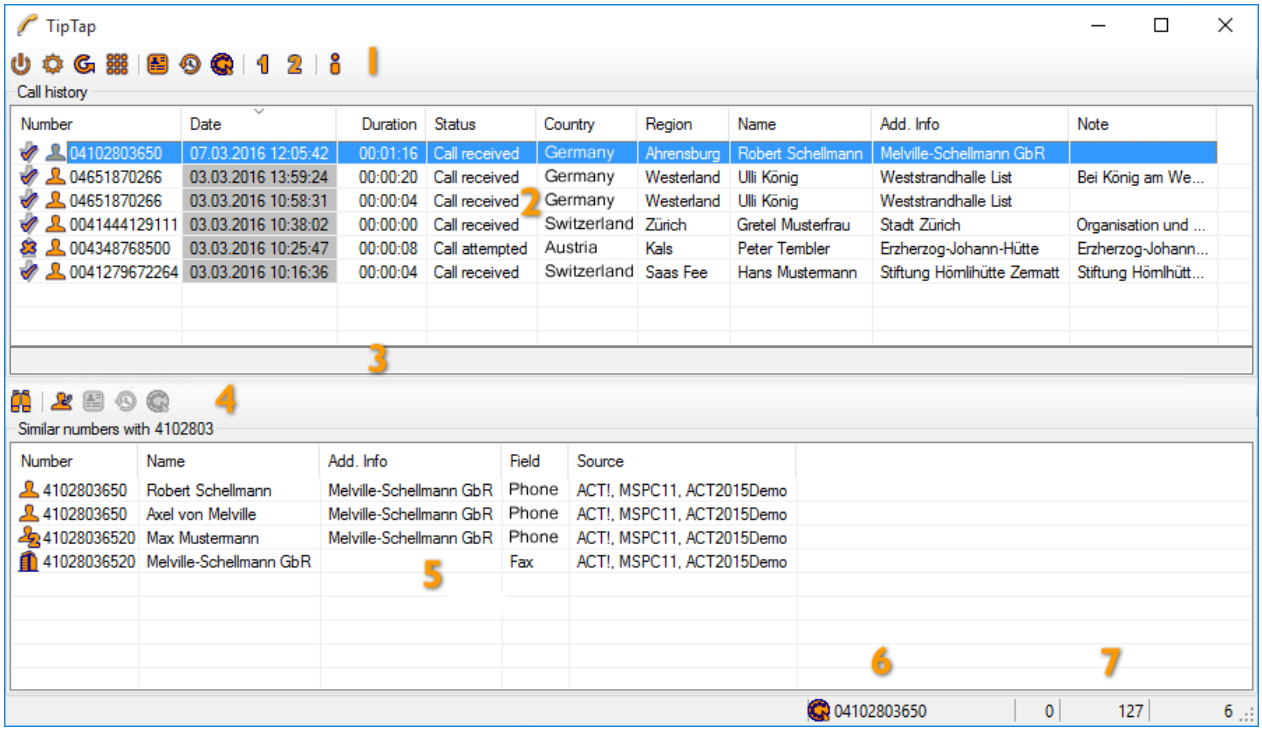
14.3 Using TipTap

Below you can see the TipTap application screen which we will now look at in more detail.



The following program functions can be initiated by clicking on the icons in the top toolbar:

- Click on this icon to enable TipTap.
- This icon takes you to the settings for TipTap.
- (F5 key) Clicking on this icon refreshes the phone numbers and updates the search cache, as well as deleting old entries in the call history (see 14.2.3)
- (F8 key) You can use this icon to manually type in a number, which the program will then dial. If text was copied into the cache beforehand, any phone number contained within it is automatically taken as the number to be dialed. If an active connection is selected in the call history, the window dials the numbers entered as DTMF dialtones.

The following three buttons belong to the current selected item in the call history list:

- (F1 key) Show contact in Act!. Brings the Act! application window to top of the desktop.
- (F7 key) Create a history entry in Act!.
- (F4 key) Dial number of the currently selected item in the call history list.

Followed by the speed dial buttons:

- (Alt key + 1 key, etc.) This is speed dial key 1. The program dials the number stored and allocated to speed dial key 1 in the configuration (see 14.2.7).
- This icon displays information on the TipTap program.

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The following icons may be displayed during an active conversation or an outgoing/incoming call:

- (F9 key) End call / hang up.
- (F9 key) Accept call
- Park call (availability depends heavily on TAPI driver.)
- Retrieve call

2 The individual calls are displayed in the top half of the monitor window. Here TipTap automatically detects whether the call is incoming or outgoing, and independently logs whether the call was accepted or ignored. It also records when the call is ended and the overall duration of the call. Various performance features depend in each case on the TAPI driver used. The following states are detected:

- New incoming call
- New outgoing call
- Active connection (conversation)
- Call was parked
- Call accepted and conversation held
- Incoming call not accepted
- Call made and conversation held.
- Call attempted, no answer

3 For each caller displayed above, optional short texts can be entered which are then then included in the subsequent logging of the details in the history entry. Simply click on the line to enter a note (F2 key). If you use the Internet search (F3 key – see below in 14.3.1) the result is pasted into this line if a match is found.

4 The toolbar for the search cache list:

- (Ctrl key + F key) Click this button and you can enter the search term on the left, next to the icon. The term in the search cache will then be checked in both the names and phone numbers. All entries found are displayed in the bottom table. The search term must have at least four characters.
- (F6 key) By clicking this button you will display all of the phone numbers of the current Act! contact from the running Act! application. These numbers are displayed in the bottom table as per the above screenshot. Note that it even displays phone numbers from the secondary contacts.

The following three icons belong to the currently selected item in the search cache list.

- (F1 key) Show the contact in Act!. Brings the Act! application window to top of the desktop.
- (F7 key) Create a history entry in Act!. The data from the current call history item is used and the contact of the selected item in the search cache list.
- (F4 key) Dial number of the selected item.

5 **TipTap** displays the Act! contacts with similar phone numbers. Here the incoming call number is checked for the prefix and the first three digits of the suffix. When looking through the search cache, any entries found are displayed here (see 4) and with the “current Act! contact” their phone numbers are shown here too (see 1). It is normal for any leading zeros to be omitted from this display.

6 This area of the status bar displays the complete phone number that would be used for dialing. Clicking on the icon on the dialpad will dial up this number.

7 The following three numbers in the status bar represent the following values:
1st number: number of events in the cache of the TAPI call monitor. As long as all TAPI events are processed, this number is zero.
2nd number: number of entries in the search cache: the size depends on the number of phone numbers in the stored Act! databases (see 14.2.5).
3rd number: number of entries in the top table of the **Call history**

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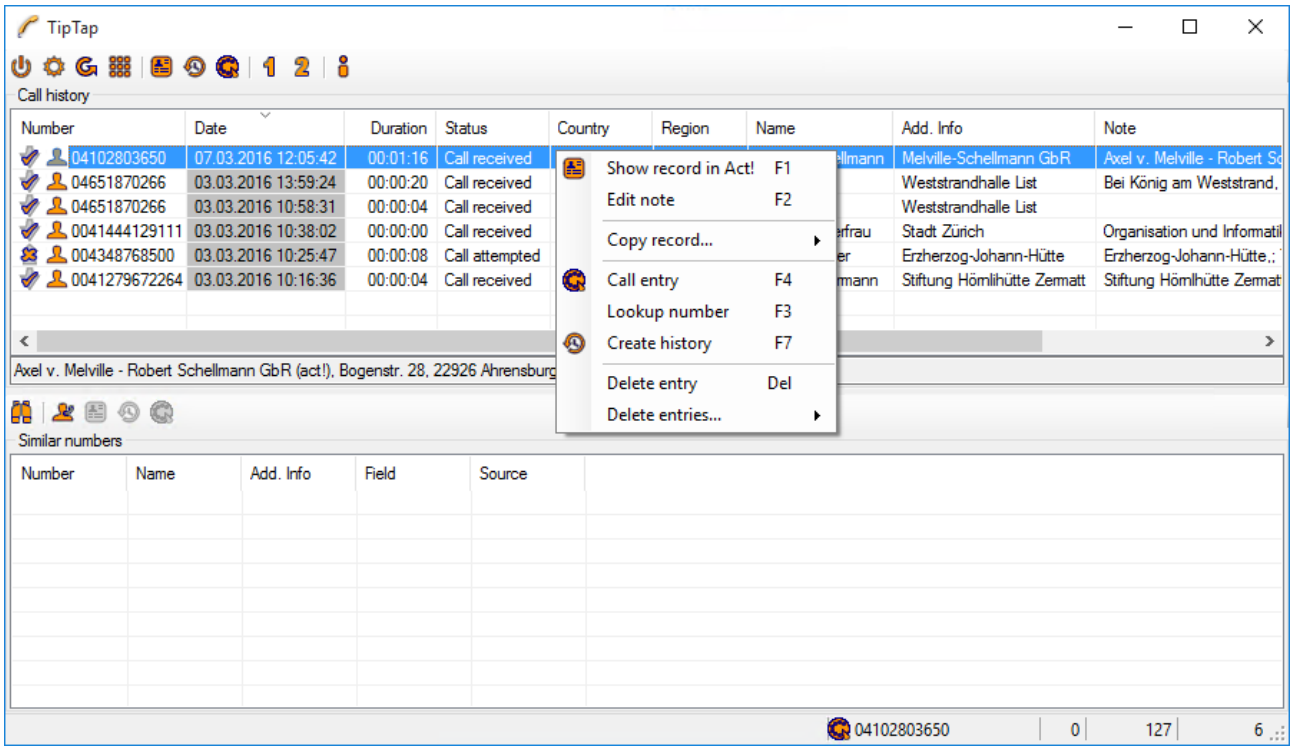
14.3.1 Options for entries in the call history (context menu)

As soon as you mark a call entry in the caller list and click the right-hand mouse button, a number of other options are made available.



Show record inAct! (F1 key)
Calls up the relevant Act! record in the current Act! application.

Edit call note (F2 key)
Puts the cursor in the middle entry line between the two tables so that you can type notes. These can later be copied over when you create an Act! history entry.

Call entry (F4 key)
Dials the call number of the selected entry.

Lookup number (F3 key)
Searches the Internet to find an address that matches the number of the current entry. The result is displayed in the memo line. Search is also performed for similar numbers.

Create history (F7 key)
Opens the dialogue to create a history entry for the selected contact

Delete entry (Delete key)
Deletes the currently highlighted call entry.

Delete entries
Here you can delete all entries or a number of entries from a certain date.

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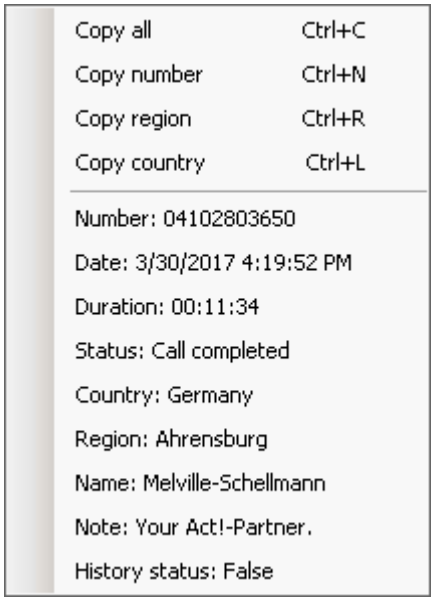
Copy record (sub menu)



Copy number, region and country (CTRL+C, N, R, L)

Copies all data, the transferred call number, region or country of the current entry into the clipboard.

The lower part of the windows shows the information from the columns number, reggion and country plus the information eventually gathered by the "reverse search" function (preceded by the keyword "Note:").
Clicking an item copies it to the clipboard (w/o the keyword).

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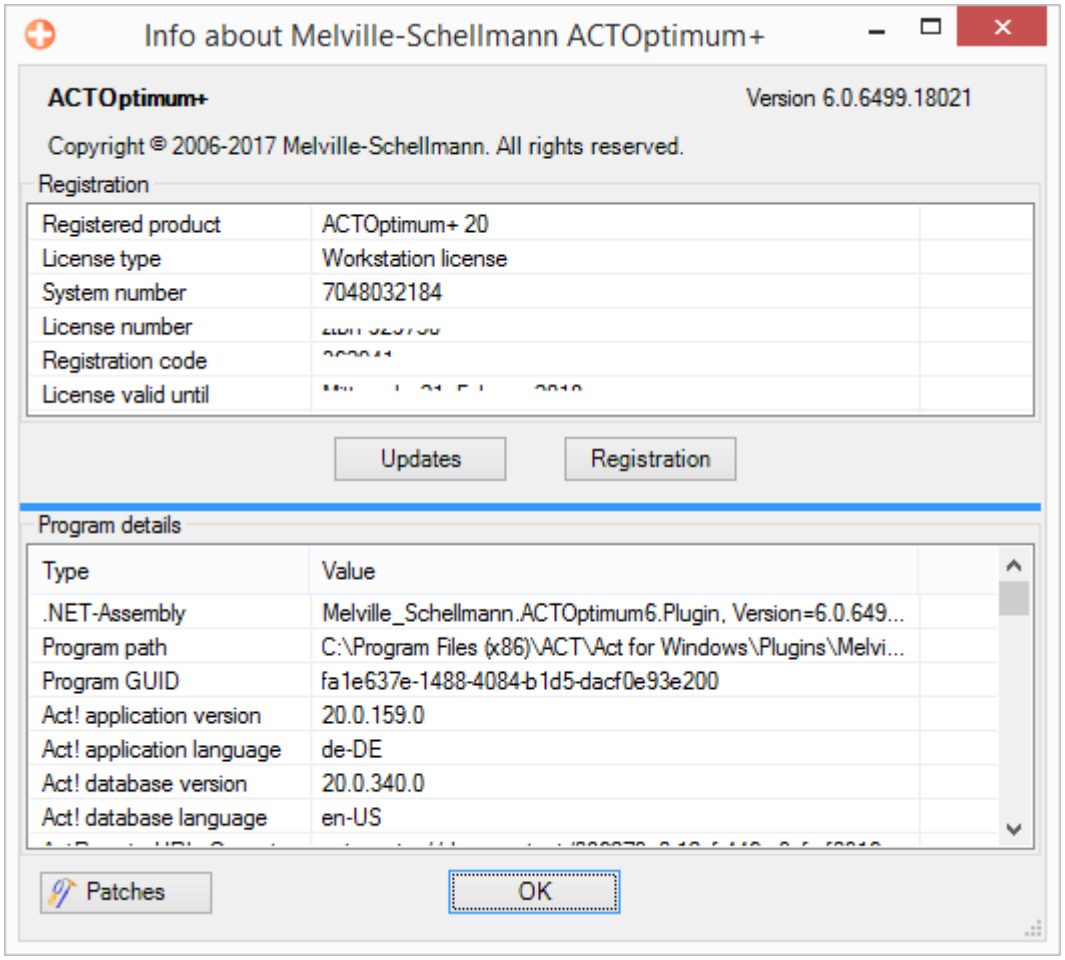
15 Act! Patches

ACTOptimum+ also gives you access to various updates that remove a small number of bugs within the Act! program. These patches can be accessed by going through the help menu: **Help ➔ Info about** ACTOptimum+**...**



Please note: The info screen also provides the ability to check for updates to ACTOptimum+ by clicking the **Updates** button.

To access the updates, click on the **Patches** icon.

The available patches are divided into four categories which we will discuss below.

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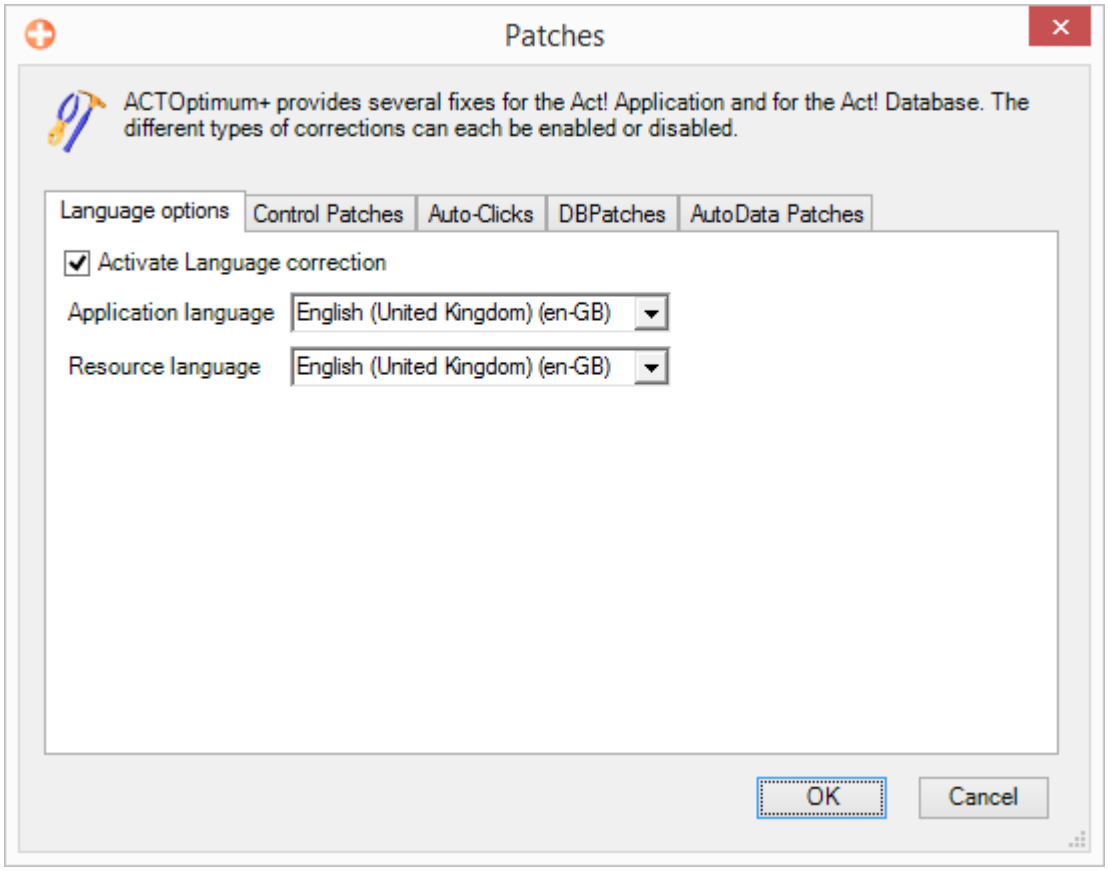
15.1 Language options

The Act! language patch gives you the ability to choose a specific regional language for the Act! application and all Act! resources. So for example, if you are using an English database, you have the option to swap between using the **en-GB** format, or the **en-US** format depending on your own preferences.

PLEASE NOTE: This patch has not been designed to swap languages entirely (ie. Changing an English database into German) but is instead it gives you a preference as to the format used to display your data (eg. The way dates are displayed, or the separator used in number fields).

This function can be enabled/disabled by checking/unchecking the relevant box.



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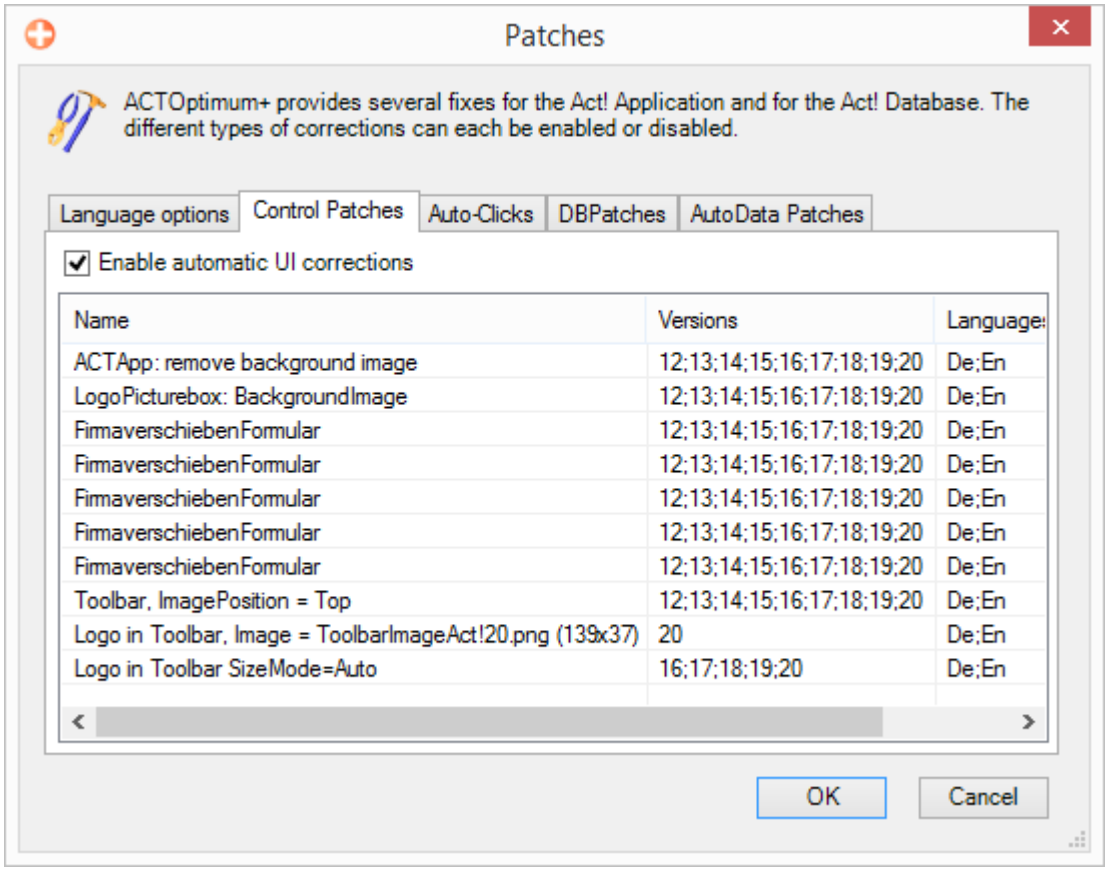
15.2 Control patches

Various patches are provided for the Act! user interface. They provide the following enhancements:

- They prevent GDI+ error messages being displayed
- They provide amendments to the form **[Firma Verschieben]**
- They replace the toolbar logo with a separate picture file allowing you to embed your own image. In the Act! installation subfolder **Plugins** a grqaphics file called **Toolbarimage.png** is stored. When you start Act! the existing graphic is replaced by this new one, and you can edit this file or replace it with one of your own accordingly.



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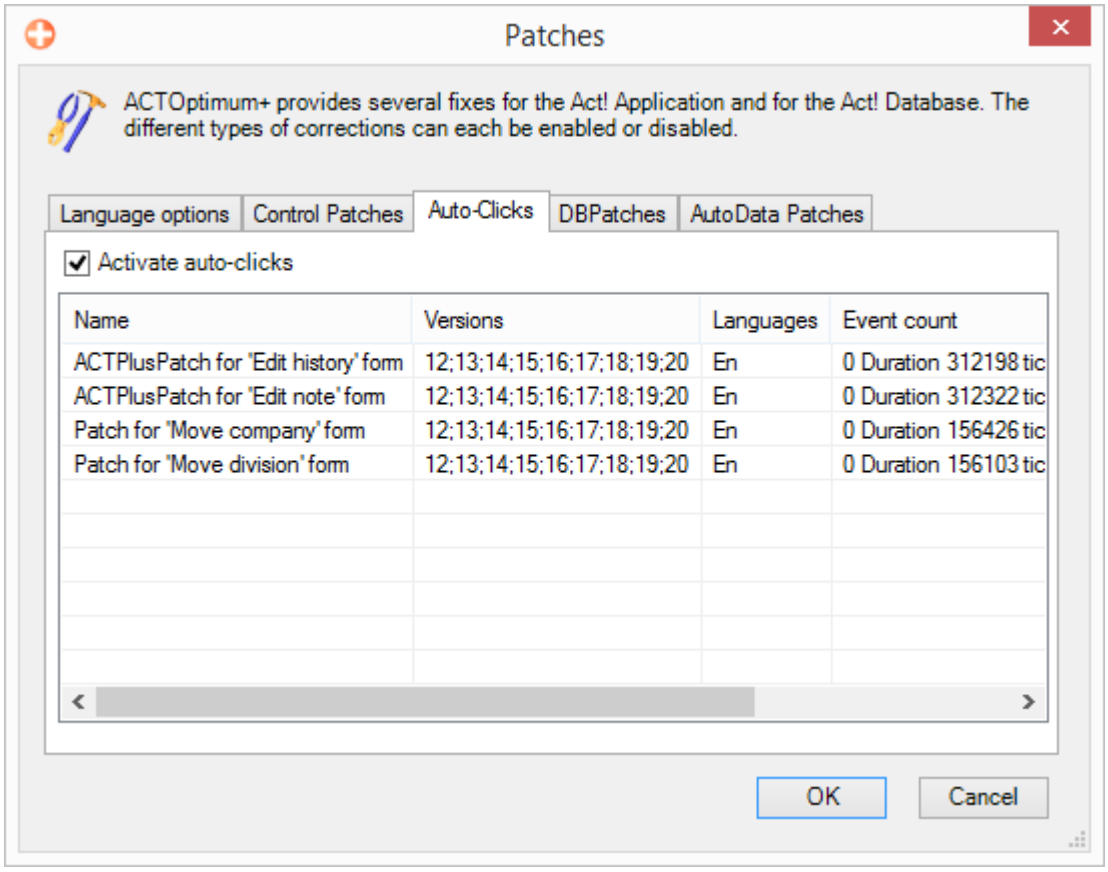
15.3 Auto-Clicks

These perform automatic mouse clicks that produce the following results:

- Avoidance of the GDI+ error
- Corrections to the **Move Company** window
- Implementation of ACTPlus functions



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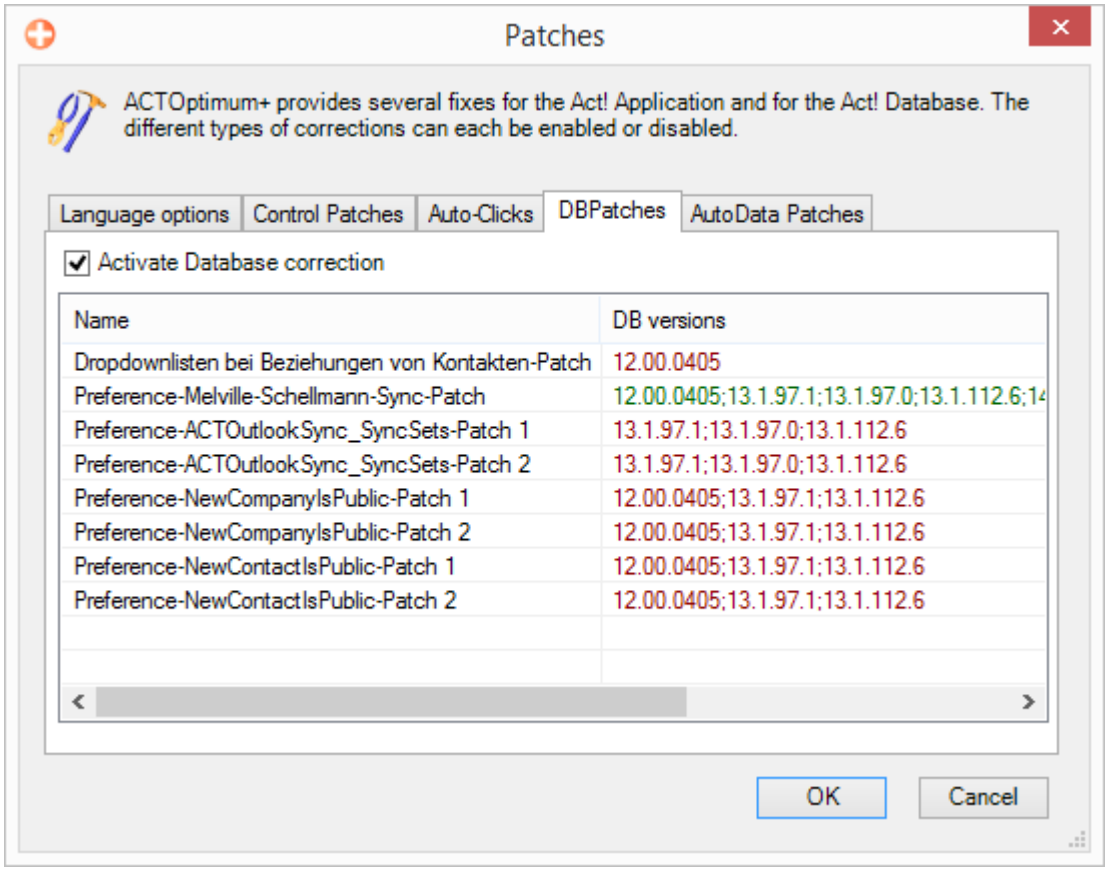
15.4 DBPatches

Database patches perform corrections directly in the Act! database that help to avoid incorrect values in the settings for the Act! Outlook Synchronisation and ensure that the access rights are set correctly for new companies and contacts.



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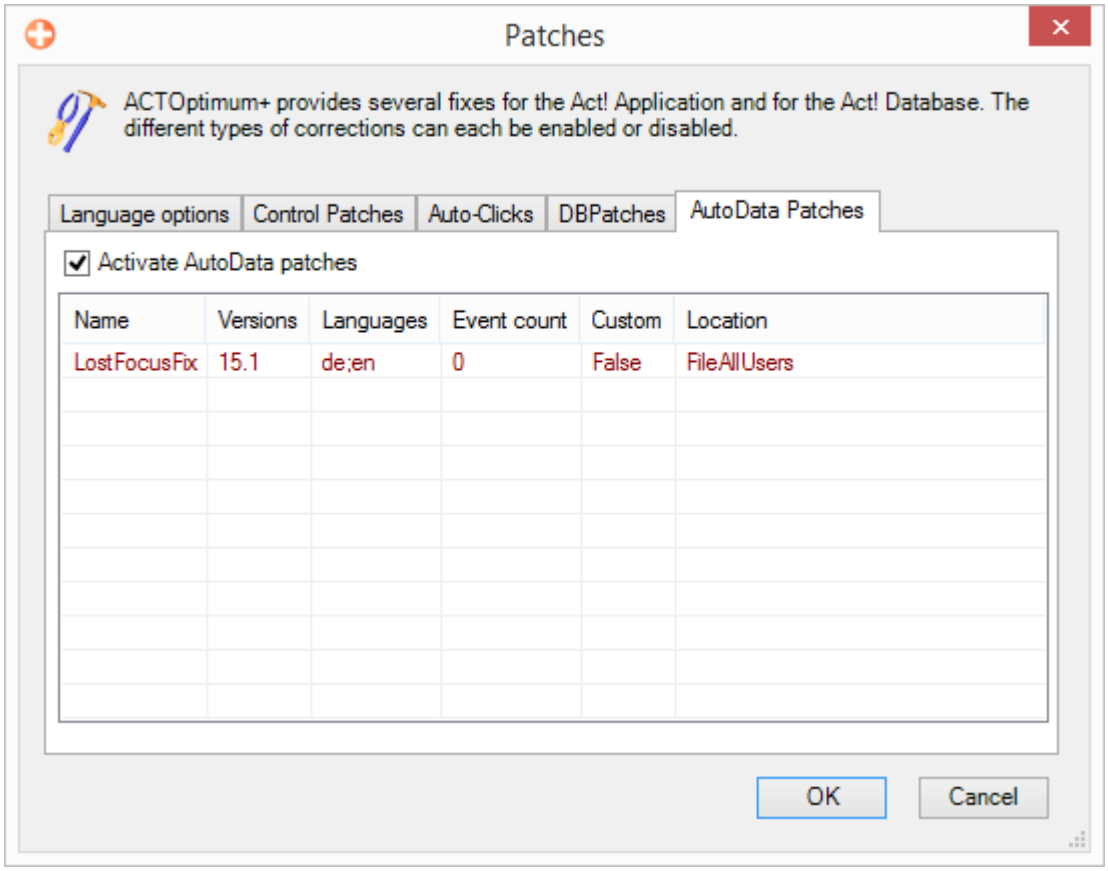
15.5 AutoData Patches

This type of patch enables AutoData scripts (VB.NET) to be performed on certain events in the Act! software.

For example, the AutoData Patch “LostFocusFix” helps to fix a loss of focus of the main Act! window in Act! 15.1. Clicking the right hand mouse button also lets you create your own AutoData Patches.



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16 Importing CustomInfo predefined standard views into ACTOptimum+

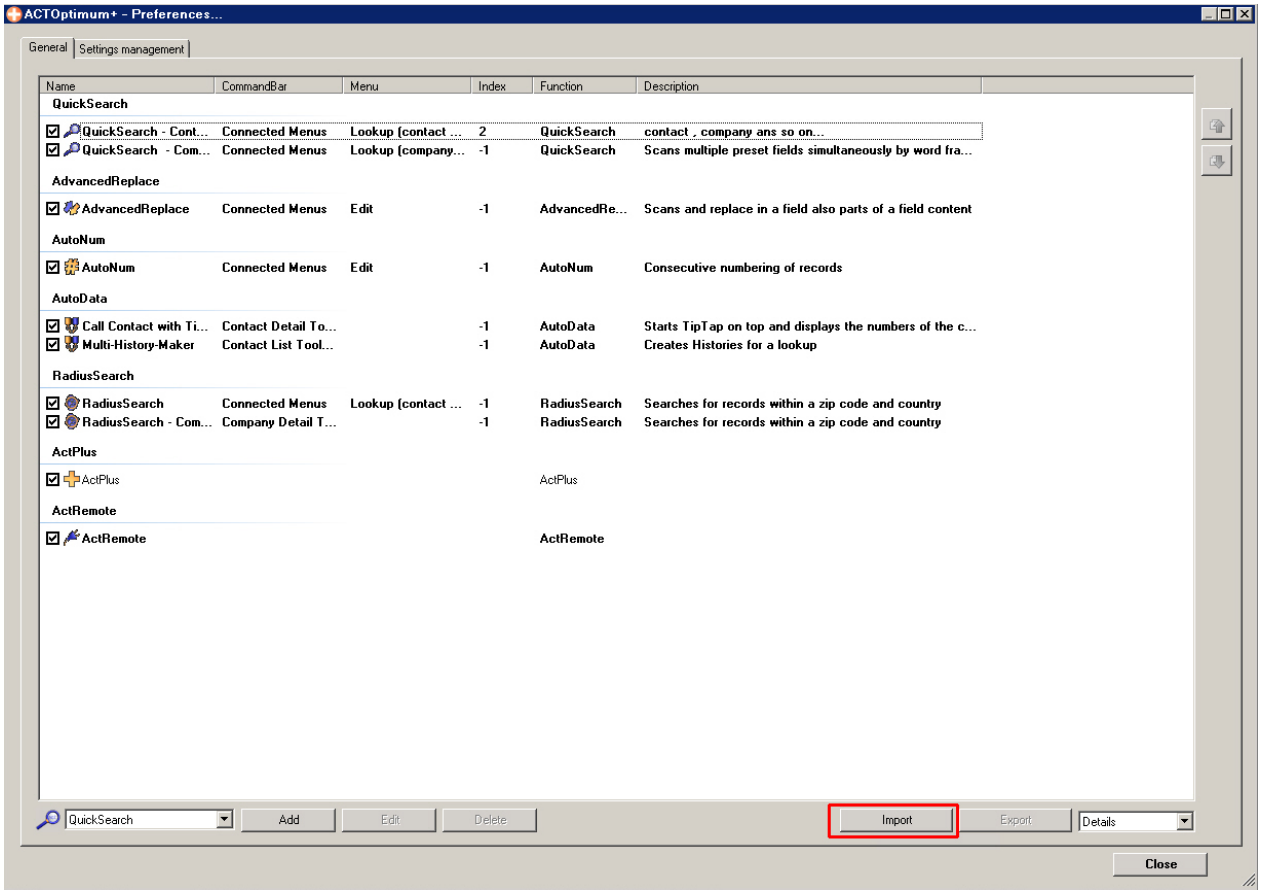
For the ease of use of the query visualizer "CustomInfo" a simple way to activate the standard views was implemented. The contents of these standard views are explained in the next chapter.

The query generator CustomInfo itself is explained in detail in a separate manual.

The folder C:\Program files\Melville-Schellmann\CustomInfo4\Databases contains an XML file (ACTOptimum+ preferences for CustomInfo views.xml) which will activate the standard views by just importing the file into the ACTOptimum+ configuration.

16.1 Import procedure

Go to "Tools"->"ACTOptimum+ preferences" and open the ACTOptimum+ configuration screen



Use the "import" button and browse to the location of the configuration file

C:\Program files\Melville-Schellmann\CustomInfo4
or
C:\Program files(x86)\Melville-Schellmann\CustomInfo4 (on a 64-bit system)

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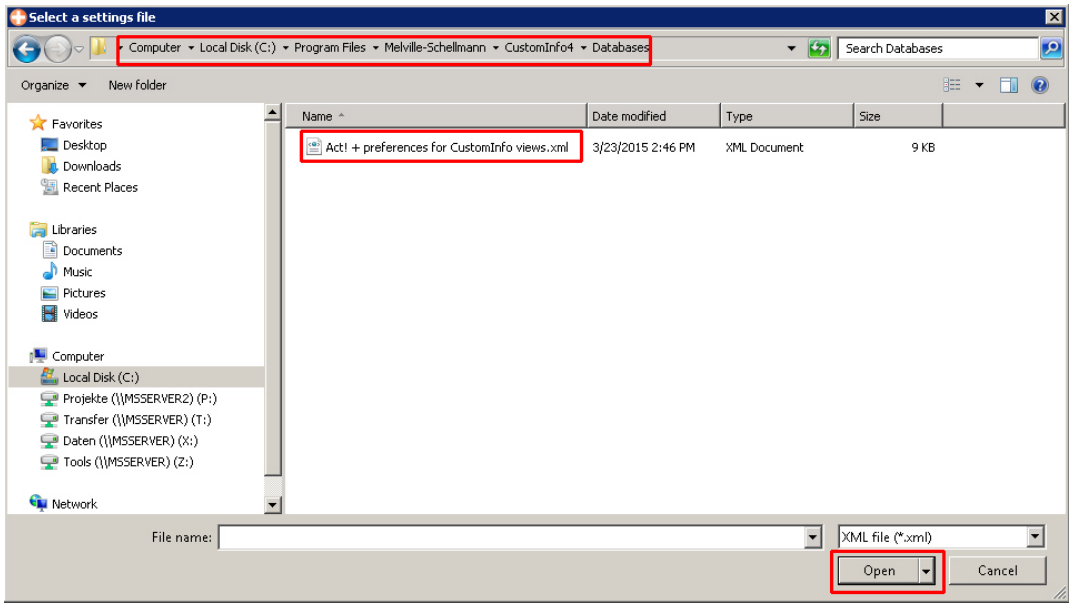
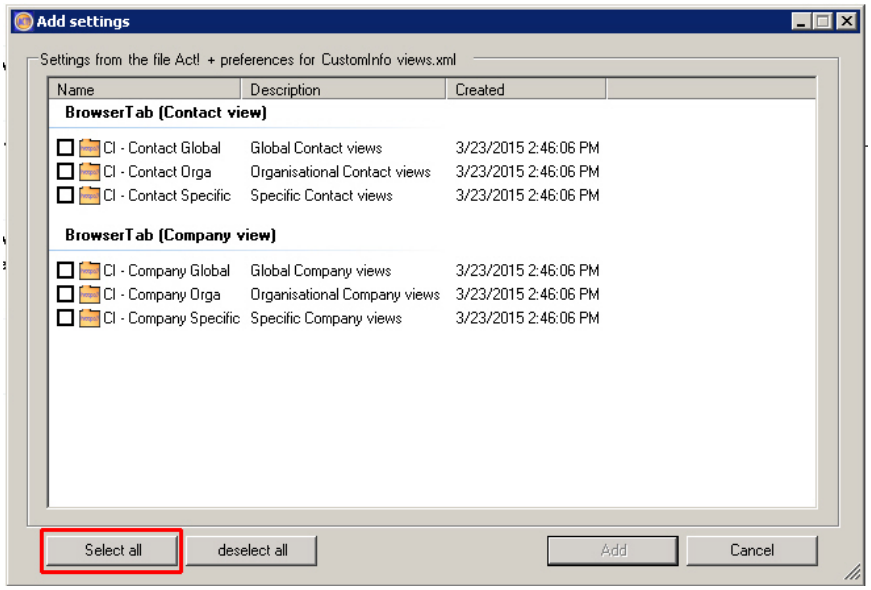


Open the file and "Select all":



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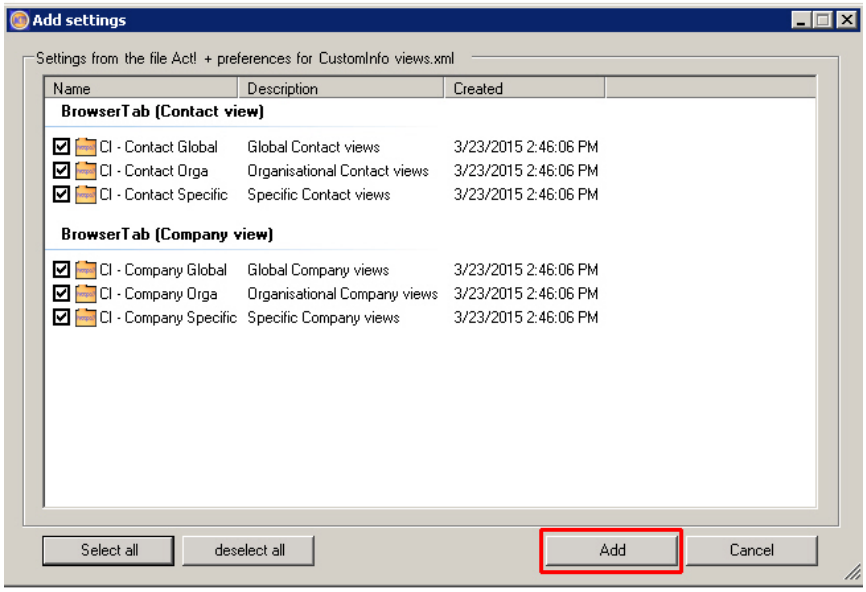
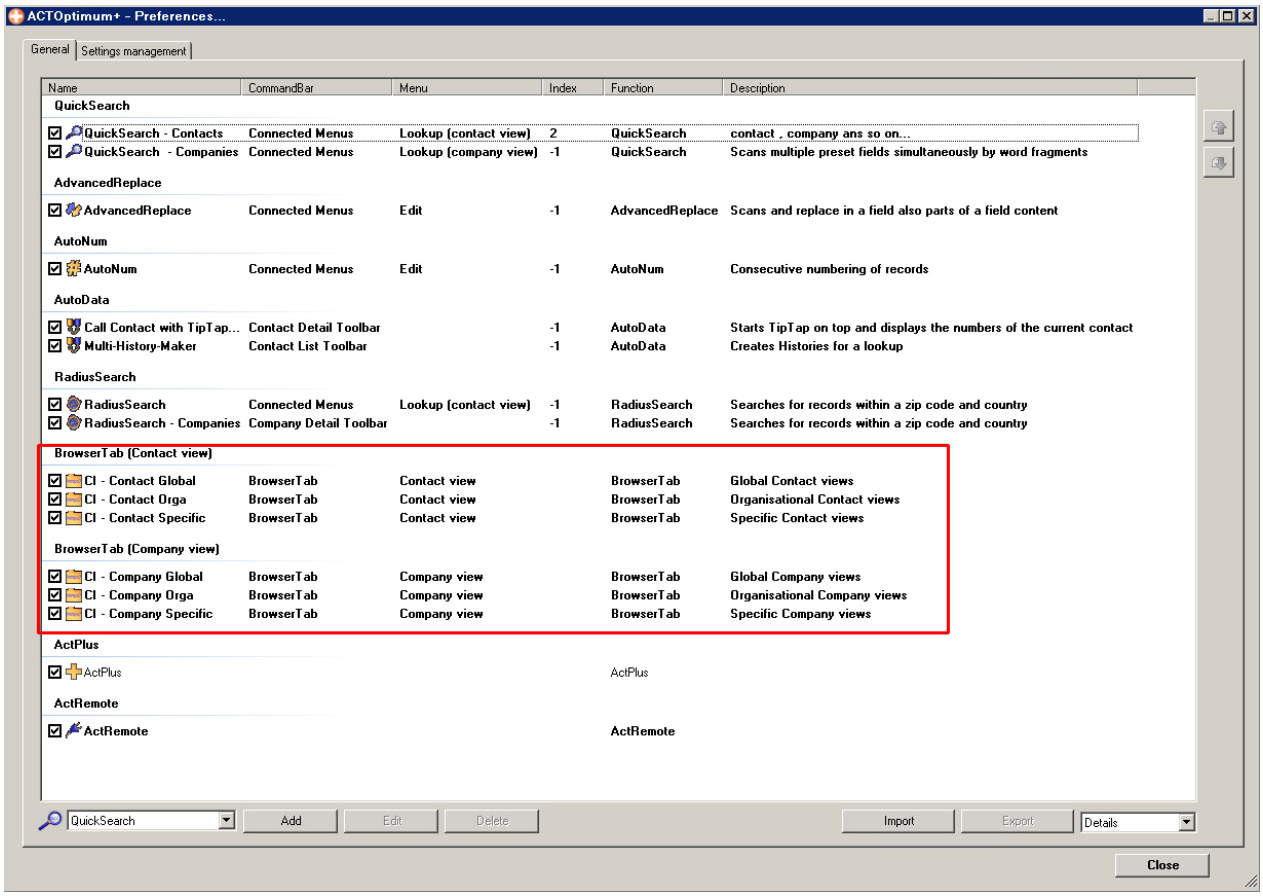
Choose "Add":



and you will see this result:



Close the configuration screen.

The standard CustomInfo Tabs and views are now available in the Contact and Company detail views.

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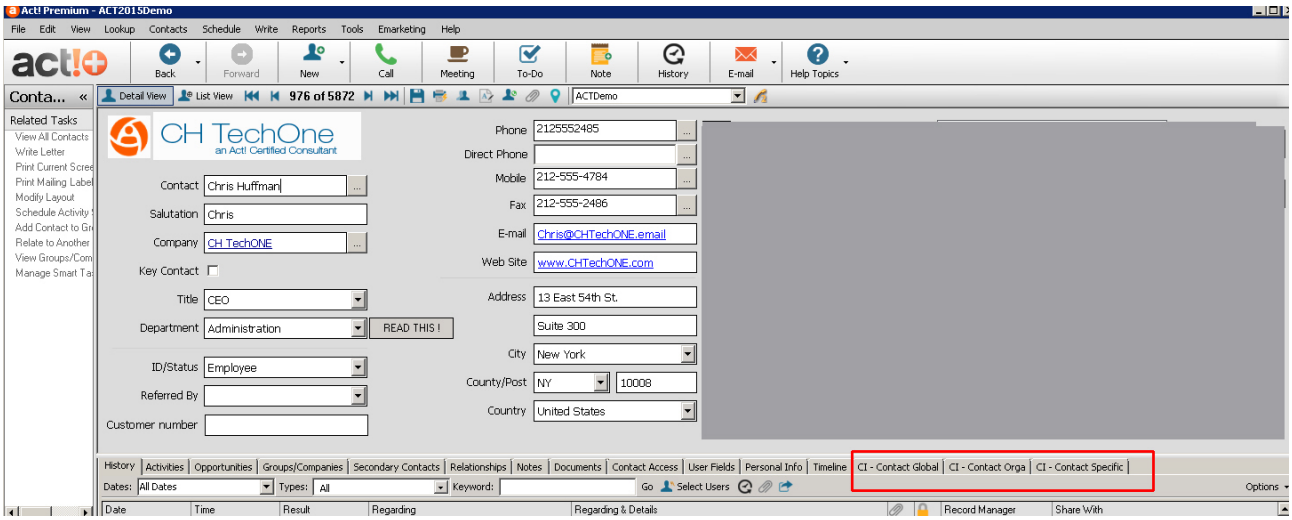
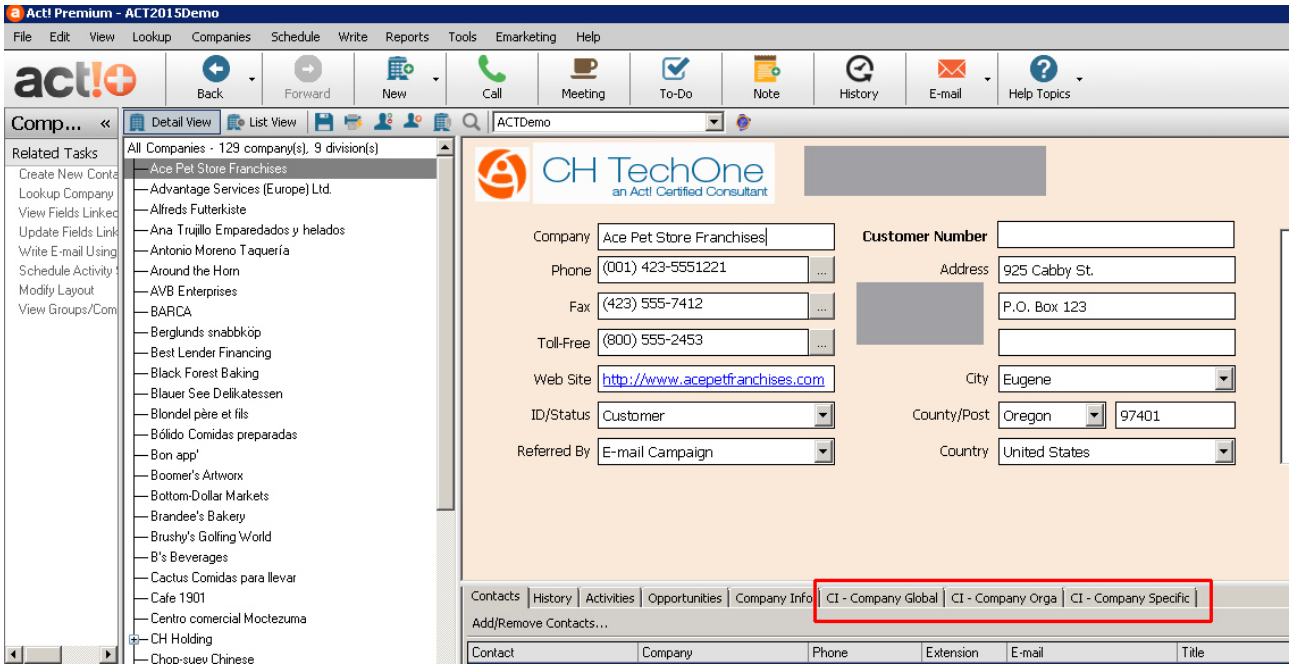
16.2 Contact views



16.3 Company views



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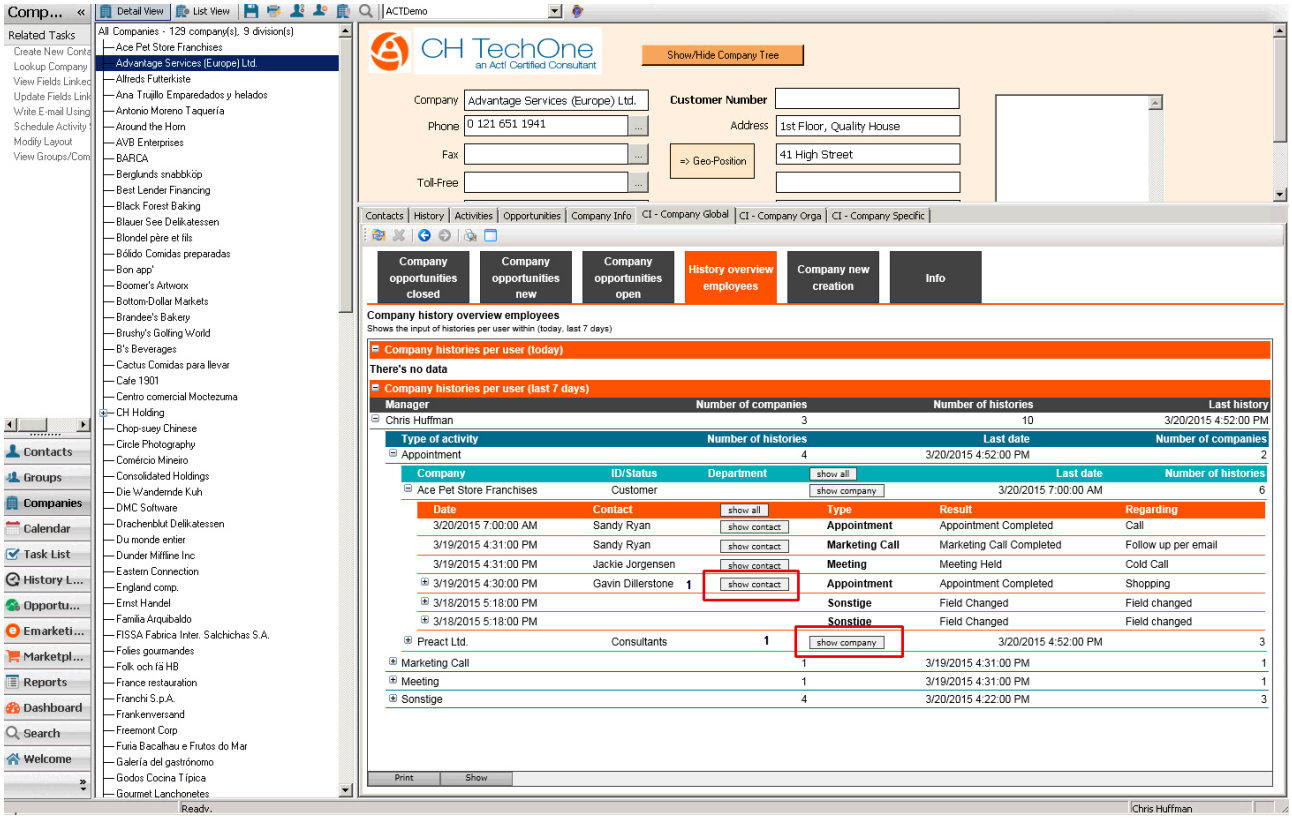
17 Short explanation of CustomInfo standard views

CustomInfo comes with ready-made data queries for an Act! database which refer to the data captured in your own Act! application, and provide you with important, readily accessible views of your own CRM performance. Condensed information for logging and forecasting is thus at your disposal straight away, making your work with Act! far more structured, efficient and meaningful.

Each Tab contains Buttons executing the actual query.

Example TAB (Company global):



The contact views are similar to the company views. Depending on how Act! is being used, some views might not be necessary in a specifically company-oriented database.

"Global" and "Organsiational" views are not related to the actual Contact/Company visible in the detail view. They deliver results based on the database as a whole whereas the "Specific" views are referring to the actual Contact/Company in the detail view. Changing the Contact/Company in the detail view will update a "Specific" view automatically.

1 In case the view shows something that might be of immediate interest concerning the context, the views contain "show" buttons , allowing to "jump" directly to the origin of data in the database (Company, Opportunity, Contact).

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17.1 Contact views Global

This view contains 5 queries.
- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Contacts of last 30 days

17.2 Contact views Organisational

This view contains 4 queries.
The queries show "bad data" in the Opportunity/Contact area.
- Contacts without Company link
- Contact histories without Company link
- overdue Opportunities
- Opportunities with zero values for amounts/probabilities

17.3 Contact views Specific

This view contains 1 query.
- Company relations

This view cures the general lack of Act! having no Company relation table, only a Contact relation table.
Based upon Contact relations, this query show relations between Companies based on the Contact relation.

17.4 Company views Global

This view contains 5 queries.
- Opportunities closed
- Opportunities new
- Opportunities open
- History overview employees
- New Companies of last 30 days

17.5 Company views Organisational

This view contains 4 queries.
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- Companies without Contact link
- Opportnities without Company link
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17.6 Company views Specific

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