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ACT! News

1. [How to download and apply Sage ACT! 2012 Service Pack 1](#). This is an extremely useful update, but remote and network ACT! users should ALWAYS check with their Administrator before applying such an update.
2. [Prepare for ACT! Training by completing the FREE online tutorials first](#). Keystroke is a certified ACT! Premier Trainer.
3. [Where to download all previous versions of ACT! back to ACT! 6, including updates](#). A handy link to bookmark for software re-installations and updates.
4. [Understanding the differences between Business Care Gold, Silver, Bronze, and Basic](#). To purchase Sage Business Care, call 416-499-3090 or Toll Free in Ontario at 1-800-857-0558.
5. [ACT! installation checklist](#). For Do-It Yourselfers that want to save some time and money.

Preferred Addons



123 Sync: *The best solution for synching ACT! data with your MS Outlook/MS Exchange.*



QuoteWerks: *Deliver professional quotes to your ACT! contacts, and then seamlessly export the transactions to Quickbooks when the deal is done.*



Topline Dash: *A solid, inexpensive reporting utility to produce the reports successful businesses demand.*



Oak!Merge: *If you have a lot of data in Excel, Access, another ACT! database, and you need it in ACT!, this is a simple, reliable, easy to use answer.*

ACT! Tech Tip of the

Don't be shy...

"5-MINUTES & IT'S FREE"

Many ACT! users limit their enjoyment of the

Month

Noteworthy

The most common mistake I find amongst long time ACT! users is the over use of the "Notes" feature. Sometimes this is a bad habit picked up from using ACT! 6 or older versions, where the Notes & History were in one section, and sometimes it's because they were never told different.

That ends now.

Notes should be used sparingly, and should only be intended to capture parenthetical ephemera on a contact, such as "Bob likes golf", or "Bob has a dog named Spot". Such notes can be tremendously useful when you're using such tools as a Keyword Search or Universal Search.

What notes should NOT be used for is to record details of a phone call, meeting, or some type of encounter with the contact. This type of record keeping should be done with "History" (Ctrl+H), as it allows you to record the type of encounter, outcome, the duration, the subject, and then allow you to trigger a follow-up.

None of these features are available in "Notes".

Why is this important?

Well, for starters, it lends to better reporting. With History you can easily calculate the total time you spent with a customer, and then break it down into types of encounters. For industries such as Financial Planners and Real Estate professionals that have a high standard of customer accountability, such reporting is critical.

For the rest of us, it allows us to better filter our contact history view by type, instead of being forced to sift through a morass of customer notes, the purpose of each is not evident until you drill down into them.

program because they're fearful of contacting an ACT! Consultant and incurring huge bills.

The truth is we have a 5-minute policy that says if we can give advise or provide a quick fix to some issue, there is no charge for the service.

Now 5-minutes may not seem like a big offer until you learn most of us provide such free remote sessions 5-8 times a day, and get our customers up and running without further delay.

What's more, a quick bit of free advise can help stop a customer from embarking on a bad deployment strategy that could truly be costly to repair.

ACT! PUBLIC CLASSES COMING SOON!
Keystroke will be announcing the start of public full-day training sessions in the early New Year. As ACT! Premier Trainers we will be employing Sage's training curriculum for end users and Administrators.

More details to follow!

Call or refer us today, and start to ActBetter.

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- *Top Ten in North America ACT! Sales*
- *#1 in Ontario/Ohio Region Sales*
- *Member of the Sage ACT! Advisory Council (BPAC)*
- *ACT! Premier Trainer*
- *Four Full-Time ACT! Consultants*
- *ACT! Database Hosting Services*

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