



QuickTasks for Act! is the fastest way to create, delegate, clear, and follow-up on activities & small projects without every opening Act!. Whether you work by yourself, or manage a large team, QuickTasks for Act! helps you be better organized, plan better, get more done, and with less effort.

Task at the speed of thought!

Prerequisites:

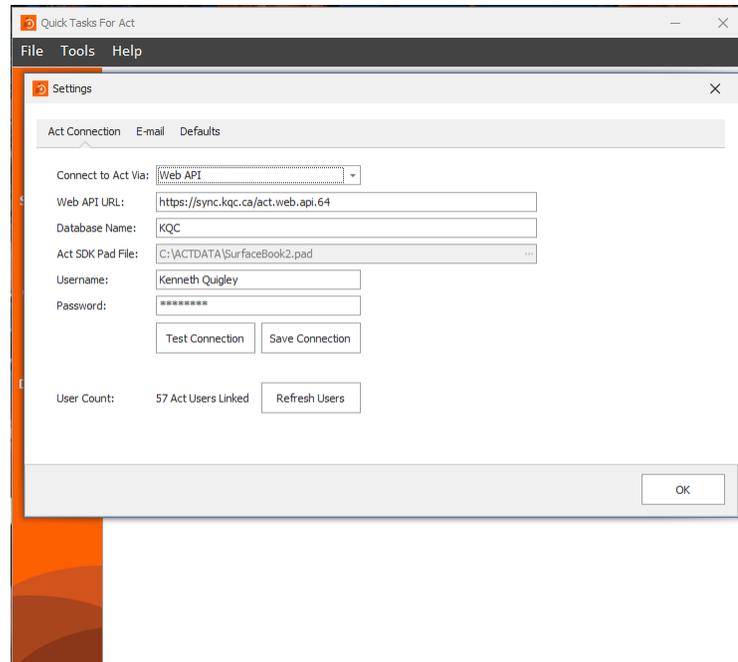
- QTFA is compatible with Act! Pro or Premium v18 or later with SDK Connection
- QTFA is compatible with Act! Premium v18 or later with WebAPI Connection using Act! Premium (with Act! Connect Link), Act! Premium Cloud with the Act! Web API available, or Act! CRM SaaS
- All users connecting with the WebAPI must have Standard security role or higher, and be assigned Web API permission.

Setup:

- Download the 14-trial from www.act4work.com/file/QTFA
- Close Act! and run the setup through to completion. There are no configurable options to worry about, and when the setup is complete the program will launch in trial mode
- Click Tools from the dropdown menu, select Preferences, and you will see three choices – Act! Connection, E-mail, and Defaults.
- **Select Act! Connection to start.**
- “Connect to Act! Via” drop down offers three options: Web API, SDK, and None
 - Web API generally involves a non-local database that is either hosted with Act!, hosted with an authorized Hosting Provider (HPP), or on your network. You can learn more about the Web API at www.Keystroke.ca/connections

- SDK stands for Software Development Kit and is the connection method for local installations of Act!. In otherwords, if you have access your database with locally installed copy of Act! on your computer, you should pick SDK
- None is for those that want to manage their tasks completely within QuickTasks for Act

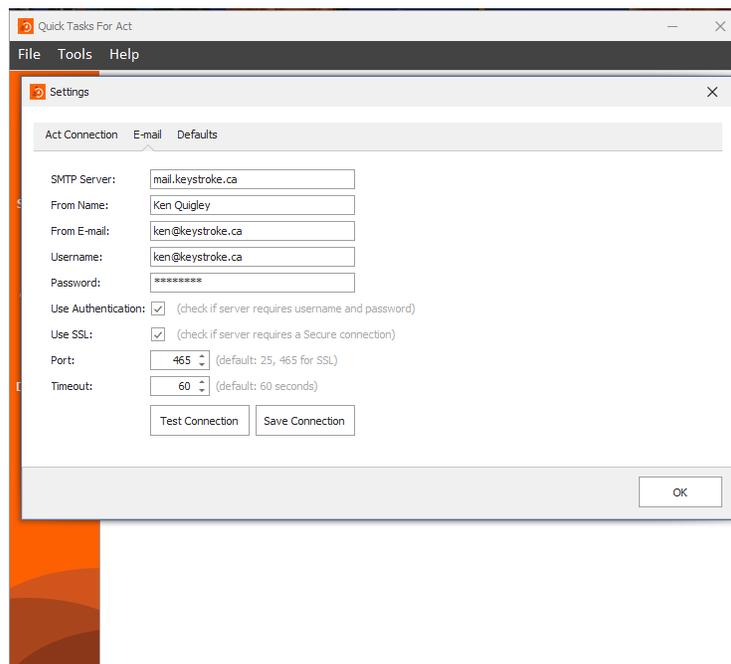
Choose your Act! Connection method:



- If you select “Web API”, you’ll need to know the Web API URL (not to be confused with your login URL for Act! Cloud), your database name, and your login credentials. Once these are entered, click “Save Connection”, and then “Test Connection” to verify. If the connection is successful, the user count in your database will display below. If it isn’t successfully, either your Web API is not running, or your credentials or API details are invalid. If you believe them to be accurate, you can go to <https://testapi.kqc.ca> and test them there.
- For SDK, you need only enter the path to your database PAD file and your database credentials. Once this information is entered, again click Save Connection”, and then “Test Connection” to verify. If the connection is successful, the user count in your database will display below.
 - If needed, you can toggle between SDK and Web API, and your connection settings will be saved for each.
 - Selecting “None” will grey out all fields

E-Mail:

- This section of the preferences is where users enter their SMTP settings so database users can be notified by email when you delegate a Task to them
- Customers are responsible for ascertaining their own SMTP information as QuickTasks for Act! can only verify the settings inputted. If uncertain, please contact your email provider.



For example, Gmail users settings would be as follows:

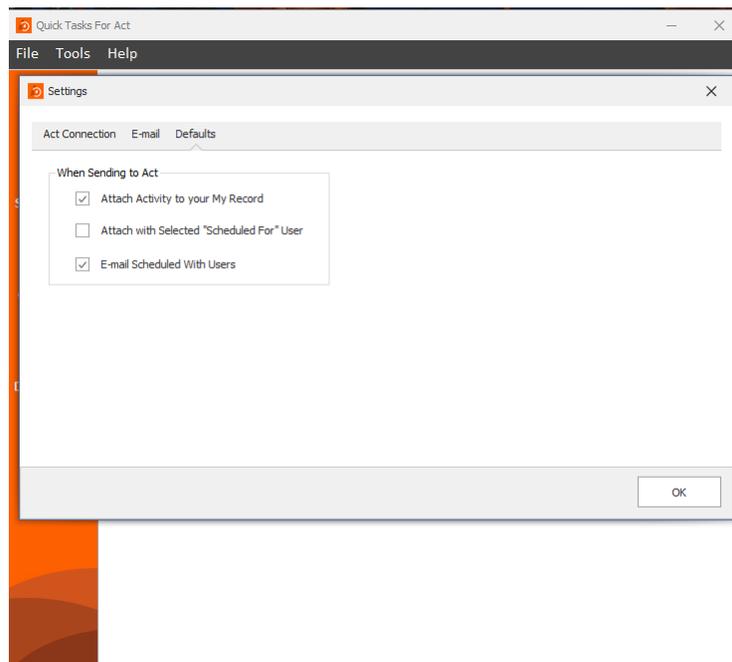
- **SMTP server:** smtp.gmail.com
From Name: Typically your first & last name
From email: youremail@gmail.com
Username: youremail@gmail.com
Password: your gmail password
Use Authentication: Check the box
Use SSL: Check the box
Port: 465 **Timeout:** 60 seconds (default)
Save & Test

Defaults:

- When Sending to Act!, QTFA gives you three options
 - **Attach to My Record** (Selecting this option will always choose the My Record as the default "Schedule With"). The Schedule With selections are chosen at time of

“Send to Act!”, and is a multi-select dropdown, meaning you can choose one or more users

- **Attach with Selected “Schedule For” user** is intended to save time. If you’d like to delegate a task to another Act! user, then you’ll want the Schedule For and Schedule With to be the same user. As mentioned above, Schedule With is selected at time of Send to Act!, whereas Schedule For is selected on a per task basis. Simply click the ellipsis at the end of Task and you’ll see the user selector four options down. Schedule For options are always single select
- **Email Scheduled With Users:** is checked by default. Deselecting this option disables the email reminders when tasks are assigned



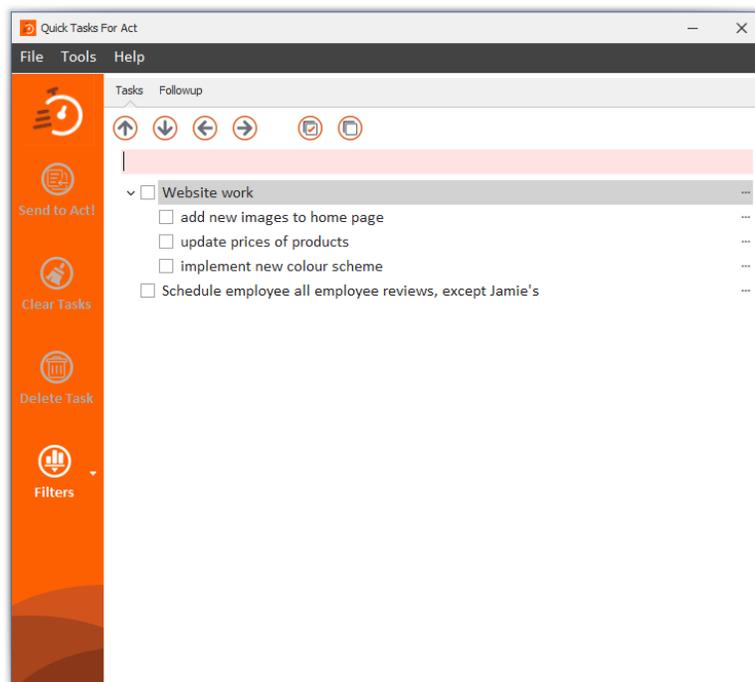
TASKS: Instructions

The basic functionality of QTFA allows users to manage task list within the app, or transfer them to Act! for follow-up. These tasks can be delegated to other users on the fly, and QTFA will email them a notification that a task has been created for them

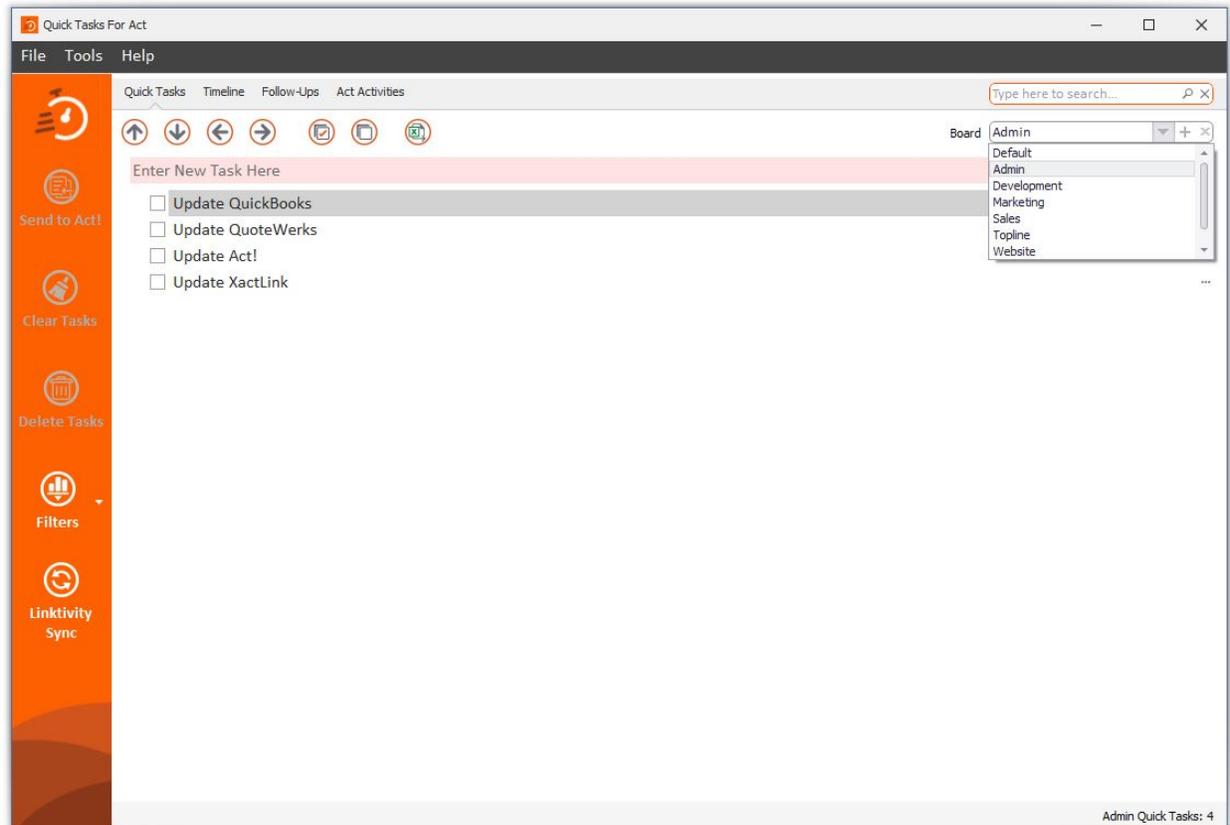
The following represent all the features and functions of QTFA which will allow you to get the most from this productivity add-on.

- **CREATE:** Creating a task is as simple as typing into the pink field that says “Enter New Task Here” and hit ENTER when complete
- **EDIT:** To edit the text of a task, simply click into an exist task and start typing
- **CLEAR:** Click the checkbox to the left of the task and then select Clear Tasks from the left Toolbar
- **DELETE:** Repeat the same steps as clear, but click Delete Task instead

- **SEND TO ACT!** Once you have written up a task and want to send it to your Act! database for follow-up, simply click the checkbox and select Send to Act!. If you do not change any options, the task will come across as a timeless “To-Do” in Act! on the day it was sent to Act!. The Schedule For and Schedule With will both be the My Record according to your login credentials in the Preferences
- **FILTERS:** The Filter feature on the left Toolbar allows you to toggle viewing of cleared tasks on or off. When a cleared task is visible, a user can click on the ellipsis at the end of the task and select Unclear.
- **MOVE UP & DOWN:** If you’d like to change the display order of tasks, QTFA includes up and down arrows on the Top Toolbar. Simply click into the task you’d like to move and then use the up or down arrows to place that task where you wish
- **INDENT AND OUTDENT:** One of the hidden powers of QTFA is the ability to group a number of subtasks under one task for simple project management. This allows you to create a small project name, and then list a number of related tasks under it. This grouping is not only visually intuitive for project management, but it allows you to select all tasks in the project at once by clicking on the parent task, and then transfer them together to Act! as a group of related tasks, as well. When subtasks are transferred together, QTFA creates the task in Act!, and inserts the name of the parent task in curly brackets as a prefix to the subtask description. This allows the Act! user to click on the “Regarding” column header in the Act! Task list to group the related tasks. Users should not the parent task is NOT transferred during the process and will remain in QTFA to be deleted or serve as a parent for additional subtasks.



BOARDS: Instructions



Boards are a QuickTask “workspace” feature. Much like how users can nest or indent some tasks under others for grouping related tasks, Boards allows them to define a full workspace for a specific purpose. Whether it be a project, department, or general subject matter, Boards allows you to enter as many related tasks as you like without cluttering them amongst unrelated tasks in the main board.

Boards are accessed from the top right dropdown list of the QuickTask program window, and the three Board functions are displayed within that window:

- Board dropdown list (down pointing triangle)
- Add Board command (+ plus sign)
- Delete board (- minus sign)
- The last two functions must be invoked with a board selected. The default board cannot be deleted.

QuickTasks allows users to create as many Boards as they need, and all the export functions at the top menu, namely Export to Excel, PDF, and Word are all specific to the active board.

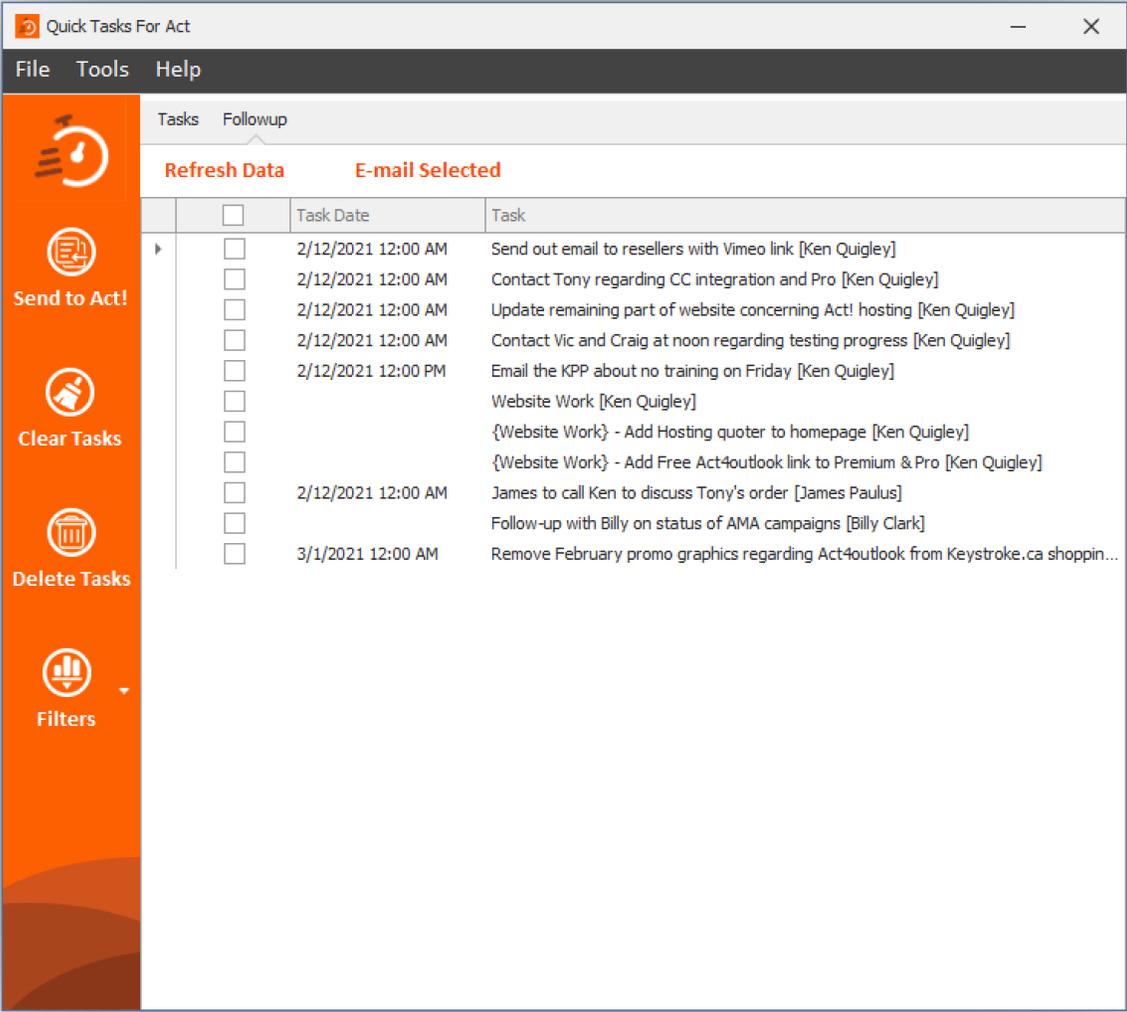
FOLLOW-UPS: Instructions

QTFA understands that proper task management cannot simply involve creating and delegating tasks, but following up on them, as well. The problem is that once they get transferred to Act! it's easy to lose track of what, when, and to whom you assigned tasks.

QTFA has you covered with Follow-Ups.

QTFA keeps track of the tasks you have transferred and/or assigned, and displays them in a list for you to help confirm they get done. QTFA not only displays the tasks that you've assigned, but it clears them from view once they're marked as complete in Act!. This allows you to narrow your focus on the outstanding tasks only. And by clicking on Refresh Data in Follow-Ups, QTFA checks the Act! database for updates, and displays an updated list of those remaining tasks.

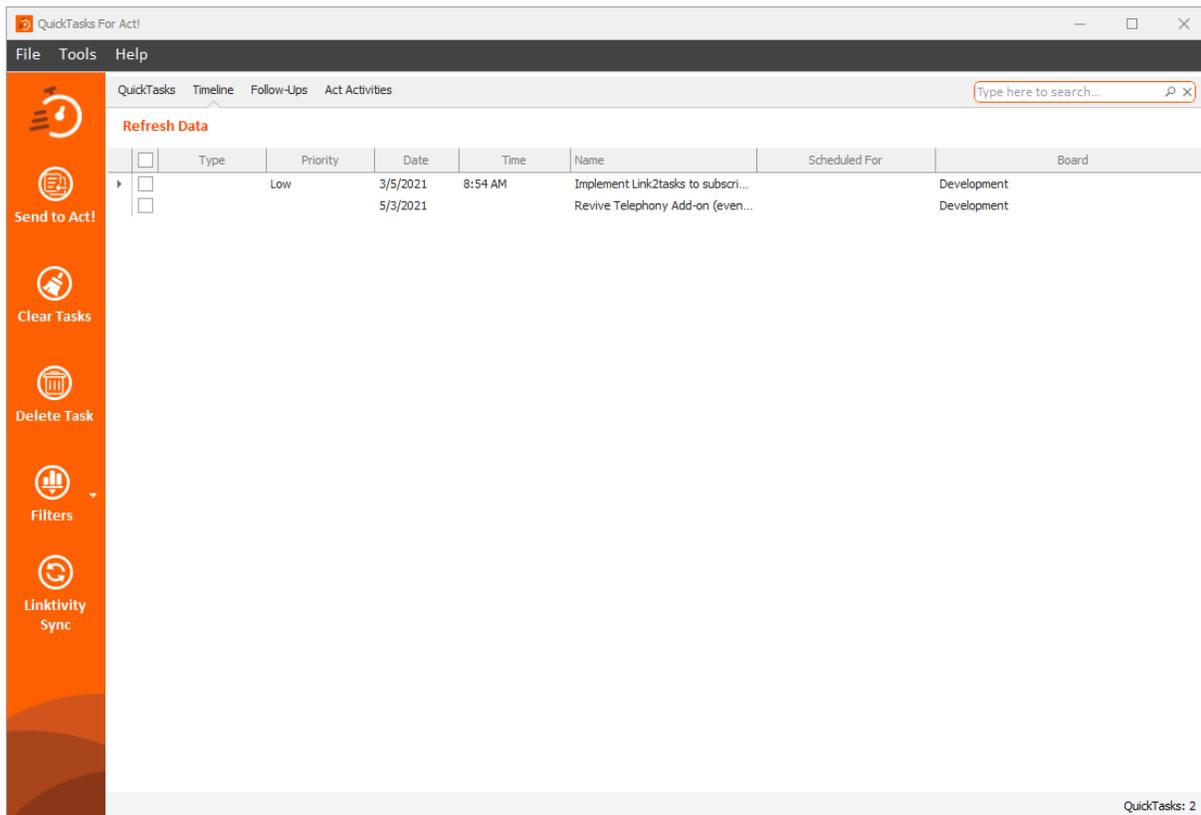
You can even select any outstanding tasks and, in one click, email out the users again to remind them that this task remains to be completed.



The screenshot shows the 'Quick Tasks For Act!' application window. The title bar includes the application name and standard window controls. The menu bar contains 'File', 'Tools', and 'Help'. Below the menu bar, there are tabs for 'Tasks' and 'Followup', with 'Followup' currently selected. The main area features a table with columns for checkboxes, 'Task Date', and 'Task'. The table contains several rows of tasks, each with a checkbox and a description. On the left side, there is a vertical sidebar with four main sections: 'Send to Act!' (with a clock icon), 'Clear Tasks' (with a trash icon), 'Delete Tasks' (with a trash icon), and 'Filters' (with a funnel icon). At the top of the sidebar, there are buttons for 'Refresh Data' and 'E-mail Selected'.

	<input type="checkbox"/>	Task Date	Task
	<input type="checkbox"/>	2/12/2021 12:00 AM	Send out email to resellers with Vimeo link [Ken Quigley]
	<input type="checkbox"/>	2/12/2021 12:00 AM	Contact Tony regarding CC integration and Pro [Ken Quigley]
	<input type="checkbox"/>	2/12/2021 12:00 AM	Update remaining part of website concerning Act! hosting [Ken Quigley]
	<input type="checkbox"/>	2/12/2021 12:00 AM	Contact Vic and Craig at noon regarding testing progress [Ken Quigley]
	<input type="checkbox"/>	2/12/2021 12:00 PM	Email the KPP about no training on Friday [Ken Quigley]
	<input type="checkbox"/>		Website Work [Ken Quigley]
	<input type="checkbox"/>		{Website Work} - Add Hosting quoter to homepage [Ken Quigley]
	<input type="checkbox"/>		{Website Work} - Add Free Act4outlook link to Premium & Pro [Ken Quigley]
	<input type="checkbox"/>	2/12/2021 12:00 AM	James to call Ken to discuss Tony's order [James Paulus]
	<input type="checkbox"/>		Follow-up with Billy on status of AMA campaigns [Billy Clark]
	<input type="checkbox"/>	3/1/2021 12:00 AM	Remove February promo graphics regarding Act4outlook from Keystroke.ca shoppin...

TIMELINE: Instructions



Timeline is a tab where all your “scheduled” tasks are aggregated and displayed in simple grid view to clarify what tasks are coming up, and when. Each of the columns, namely Activity Type, Priority, Date, Time, Scheduled With, Scheduled For, and Board are displayed, and these list of scheduled tasks can be sorted or filtered by the column headers. Columns can also be resized to suit the users needs, as can the program itself.

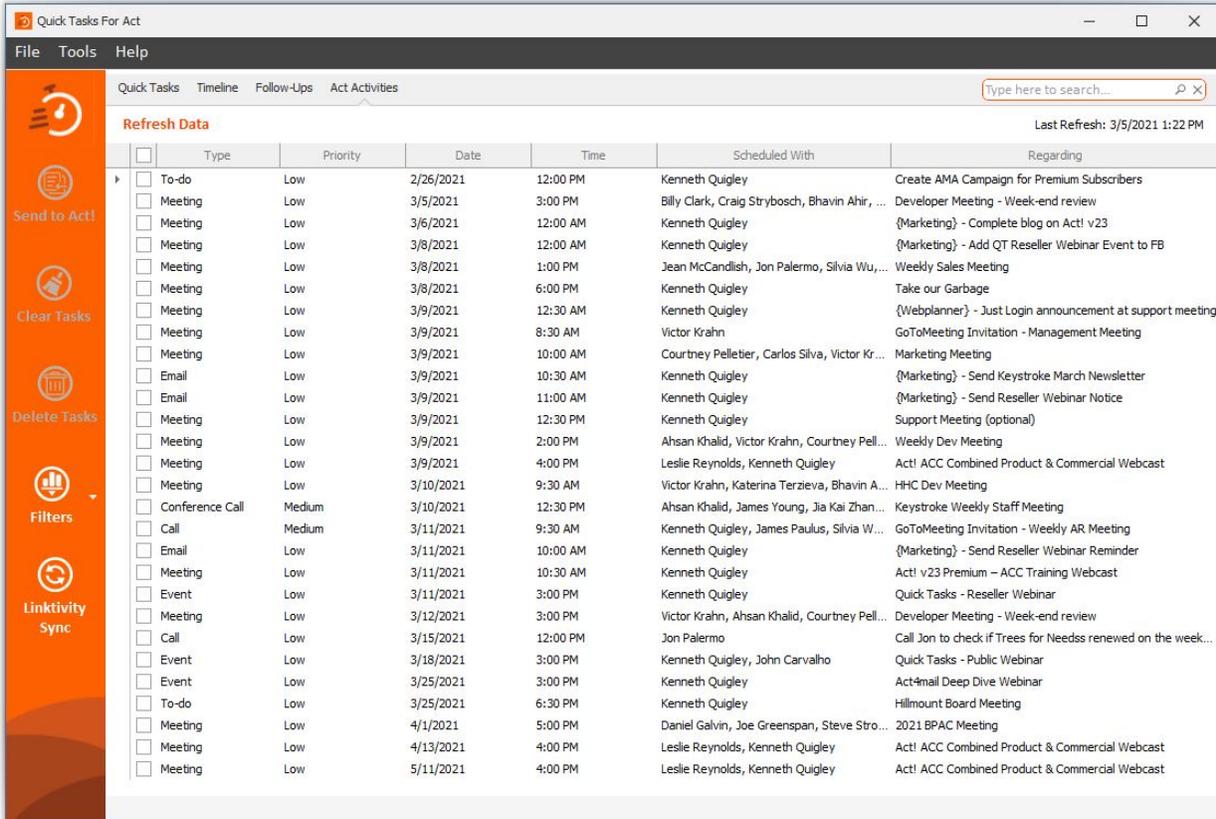
Other Timeline features include:

- Users can also right-click on any part of a task and select “Go to task” and they will be taken to that task.
- Tasks can be cleared or deleted from the Timeline view. Simply check the box to the right of the task in question, and click either of the functions from the left command menu.
- Clicking refresh will update the timeline with any new scheduled tasks

SEARCH feature

Quick Tasks supports searching across all Tabs in Act! from the search field in the top right corner of the application. The search is contextual, and will only display results from the open tab or board. When the filters a set to display cleared tasks, the search will work with those too.

ACT! ACTIVITIES: Instructions



The screenshot shows the 'QuickTasks For Act' application window. The interface includes a menu bar (File, Tools, Help), a toolbar with 'Refresh Data' and 'Last Refresh: 3/5/2021 1:22 PM', and a search bar. The main area displays a table of tasks with columns for checkboxes, Type, Priority, Date, Time, Scheduled With, and Regarding. The table contains 25 rows of task data.

<input type="checkbox"/>	Type	Priority	Date	Time	Scheduled With	Regarding
<input type="checkbox"/>	To-do	Low	2/26/2021	12:00 PM	Kenneth Quigley	Create AMA Campaign for Premium Subscribers
<input type="checkbox"/>	Meeting	Low	3/5/2021	3:00 PM	Billy Clark, Craig Strybosch, Bhavin Ahir, ...	Developer Meeting - Week-end review
<input type="checkbox"/>	Meeting	Low	3/6/2021	12:00 AM	Kenneth Quigley	{Marketing} - Complete blog on Act! v23
<input type="checkbox"/>	Meeting	Low	3/8/2021	12:00 AM	Kenneth Quigley	{Marketing} - Add QT Reseller Webinar Event to FB
<input type="checkbox"/>	Meeting	Low	3/8/2021	1:00 PM	Jean McCandlish, Jon Palermo, Silvia Wu, ...	Weekly Sales Meeting
<input type="checkbox"/>	Meeting	Low	3/8/2021	6:00 PM	Kenneth Quigley	Take our Garbage
<input type="checkbox"/>	Meeting	Low	3/9/2021	12:30 AM	Kenneth Quigley	{Webplanner} - Just Login announcement at support meeting
<input type="checkbox"/>	Meeting	Low	3/9/2021	8:30 AM	Victor Krahn	GoToMeeting Invitation - Management Meeting
<input type="checkbox"/>	Meeting	Low	3/9/2021	10:00 AM	Courtney Pelletier, Carlos Silva, Victor Kr...	Marketing Meeting
<input type="checkbox"/>	Email	Low	3/9/2021	10:30 AM	Kenneth Quigley	{Marketing} - Send Keystroke March Newsletter
<input type="checkbox"/>	Email	Low	3/9/2021	11:00 AM	Kenneth Quigley	{Marketing} - Send Reseller Webinar Notice
<input type="checkbox"/>	Meeting	Low	3/9/2021	12:30 PM	Kenneth Quigley	Support Meeting (optional)
<input type="checkbox"/>	Meeting	Low	3/9/2021	2:00 PM	Ahsan Khalid, Victor Krahn, Courtney Pell...	Weekly Dev Meeting
<input type="checkbox"/>	Meeting	Low	3/9/2021	4:00 PM	Leslie Reynolds, Kenneth Quigley	Act! ACC Combined Product & Commercial Webcast
<input type="checkbox"/>	Meeting	Low	3/10/2021	9:30 AM	Victor Krahn, Katerina Terzieva, Bhavin A...	HHC Dev Meeting
<input type="checkbox"/>	Conference Call	Medium	3/10/2021	12:30 PM	Ahsan Khalid, James Young, Jia Kai Zhan...	Keystroke Weekly Staff Meeting
<input type="checkbox"/>	Call	Medium	3/11/2021	9:30 AM	Kenneth Quigley, James Paulus, Silvia W...	GoToMeeting Invitation - Weekly AR Meeting
<input type="checkbox"/>	Email	Low	3/11/2021	10:00 AM	Kenneth Quigley	{Marketing} - Send Reseller Webinar Reminder
<input type="checkbox"/>	Meeting	Low	3/11/2021	10:30 AM	Kenneth Quigley	Act! v23 Premium - ACC Training Webcast
<input type="checkbox"/>	Event	Low	3/11/2021	3:00 PM	Kenneth Quigley	Quick Tasks - Reseller Webinar
<input type="checkbox"/>	Meeting	Low	3/12/2021	3:00 PM	Victor Krahn, Ahsan Khalid, Courtney Pell...	Developer Meeting - Week-end review
<input type="checkbox"/>	Call	Low	3/15/2021	12:00 PM	Jon Palermo	Call Jon to check if Trees for Needs renewed on the week...
<input type="checkbox"/>	Event	Low	3/18/2021	3:00 PM	Kenneth Quigley, John Carvalho	Quick Tasks - Public Webinar
<input type="checkbox"/>	Event	Low	3/25/2021	3:00 PM	Kenneth Quigley	Act!4mail Deep Dive Webinar
<input type="checkbox"/>	To-do	Low	3/25/2021	6:30 PM	Kenneth Quigley	Hillmount Board Meeting
<input type="checkbox"/>	Meeting	Low	4/1/2021	5:00 PM	Daniel Galvin, Joe Greenspan, Steve Stro...	2021 BPAC Meeting
<input type="checkbox"/>	Meeting	Low	4/13/2021	4:00 PM	Leslie Reynolds, Kenneth Quigley	Act! ACC Combined Product & Commercial Webcast
<input type="checkbox"/>	Meeting	Low	5/11/2021	4:00 PM	Leslie Reynolds, Kenneth Quigley	Act! ACC Combined Product & Commercial Webcast

One of the more powerful features of QuickTasks is its ability to import the user's activities from Act!, and then sort, filter, and clear them from within the QuickTask program.

Simply click Refresh Data from the toolbar, and QuickTasks will import/update your activities either locally through the SDK connection or remotely via the Act! WebAPI.

Much like in Act!, these tasks will be displayed in grid view, allowing your to sort all your tasks by clicking on the column headers. Unlike in Act!, QuickTasks allows you to filter your list by the column header, as well.

The columns displayed in the Act! Activities tab are as follows:

- clearing checkbox
- Activity Type
- Priority
- Date and Time
- Scheduled With
- Regarding.

Notably absent is the Scheduled For, which is not required since QuickTasks will only import the My Record's activities.



Linktivity Syncing and Licensing

QuickTasks for Act! is a perpetual license product. A one-time fee of \$59.95 is all you need to pay to use QuickTasks indefinitely, and in-version updates are included with the purchase price.

QuickTasks for Act! licensing also permits two activations, allowing you to install it on your desktop & laptop, or home and workplace computer. It can even work with you and an assistant.

We realized that having two sets of QuickTasks that are not in sync would undercut the productivity potential of the program so we developed a conduit between the two called Linktivity Sync, which is located on the bottom the left-side command bar.

Linktivity syncing uploads & updates an SQL Lite database for your account on the Linktivity server (an Azure hosted server). This syncing service is called "Link2tasks", and is a separate subscription costing \$30/year per user.

Link2tasks allows QuickTasks users to sync the QT databases between computers and mobile devices. In April 2021 we'll be releasing mobile versions of QuickTasks for both IOS and Android to further extend the reach of QuickTasks to where ever you go.

The Link2tasks subscription also includes upgrade assurance for all future releases of Quicktasks beyond in-version updates. We have quite an ambitious roadmap ahead with QuickTasks and we think each user will want to use the updates we have planned.

That said, users that have a single installation of Act! and QuickTasks may not need the syncing service in QuickTasks, so that's why this is an optional service.

Fast Facts about QuickTasks and Linktivity

- SQL Lite is the data structure, and we provide numerous utilities to help you maintain, backup, and restore your QT database.
- Mobile clients sync any tasks you create on your mobile device to the Windows client, from where you can send to Act!, but mobile clients do NOT write directly to Act!
- Despite being stored on our Linktivity servers, your data is locked down to your account and only accessible with either the mobile or Windows client. No data is ever published.