

STAR-INFO

NEWSLETTER for ACT! by Sage

Useful Custom Templates And Groups

Two Timesaving Tools For More Timely And Professional Follow-Up Communications

The strength of your sales team lies in its ability to make a personal connection when speaking with prospects and customers. You can increase the effectiveness of your sales calls and telemarketing campaigns with prompt written follow-up correspondence, either by mail or e-mail. By quickly following up on the initial phone or in-person contact, you show the customer or prospect that you appreciate their interest. It also gives you an opportunity to reinforce your message and put your product or service information in their hands.

In this article, we will show how you can have a professional follow-up message ready to go whenever it is needed, using Custom Templates. We also will show how setting up Groups within ACT! by Sage allows you to send your message to a targeted group of customers or prospects.

Custom Templates

Custom templates allow you to make the follow-up process fast and effective for your sales team. When you take the time up front to create templates for follow-up letters and e-mail messages, you save time while maintaining a consistent and professional look to your organization's correspondence. And by saving your sales team time you allow them to get to the next sales visit or phone call faster. Here we provide step-by-step instructions for



creating custom templates. You can use custom templates either to follow up on a specific sales call, or to send a follow-up e-mail message to a group of prospects or customers who indicated interest.

Create several templates so that your team can select the one most appropriate to the situation. Here are the steps:

1. Choose Write, Edit Template from the ACT! menu.

2. Select a template from the list that is closest in style to what you need and click Open.

3. From the menu, select File, Save As. Enter a new descriptive name for the template, and click Save. Do this *before* you edit the template to avoid accidentally overwriting the basic template.

4. Create the content for the letter or e-mail message or copy and paste content

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Using Custom Templates And Groups

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from past communications that you found to be effective.

5. Insert place holders for fields to personalize each letter or e-mail. Position your cursor at the place in the document where you want to insert the field. Then select the field to insert from the Add Mail Merge Fields dialog box and click Add.
6. Save and close the file.

You now are ready to merge the template with any Group or Contact in your database as follows:

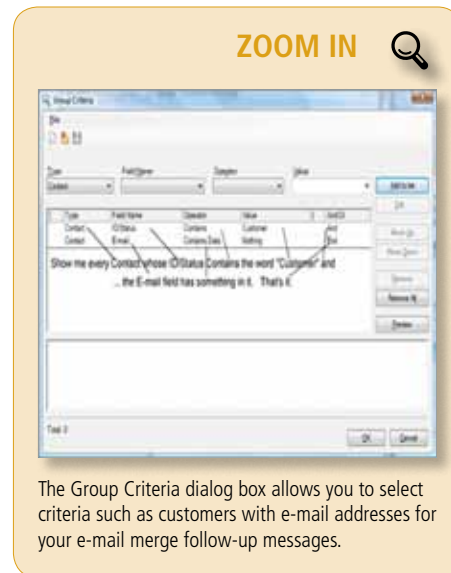
1. With the selected Contact(s) open, choose Write, E-mail Message (from template) or Write, Other Document (from template).
2. Select the template and click Open.
3. Add comments if desired and click *Send* for an e-mail or *Print* for a letter.

Using Groups For Mail Merges

Another way to use custom templates is to send them to an entire Group of contacts that meet your specified criteria. In this example,

we create a Group of contacts identified as customers, who also have e-mail addresses.

1. Click on the Groups icon at the left to go to Group Detail view.
2. Click the New Group icon on the toolbar.
3. Enter a name for the Group.
4. Click the Add/Remove Contacts button



The Group Criteria dialog box allows you to select criteria such as customers with e-mail addresses for your e-mail merge follow-up messages.

on the Contacts tab.

5. Click the Edit Criteria button in the Add/Remove Contacts dialog. This will open the Group Criteria dialog box (see Zoom In image).
6. Click the Field Name drop-down and select ID/Status. For the Operator, select Contains. In the Value area, select Customer. Click Add to list. For the second row of the query, select the E-mail field and choose the Operator of Contains Data. Click Add to list.
7. Click Preview to check your results so far. If it looks correct, then click OK to save the query criteria for the group.
8. Click OK once again to save the group.

Creating a dynamic group by defining Group criteria will help you keep your Groups up to date. Any new Contact with an ID/Status of Customer with an e-mail is automatically added to the Group.

Please call us with your questions about using Groups or Custom Templates. ✨

Setting Activities As Private in ACT! by Sage

If you rely on ACT! by Sage to manage your day, it makes sense to include your personal as well as your work-related activities. When everything is in one place, it is easier to stay on top of your schedule and avoid conflicts.

But, what if your meeting or appointment is of a personal or confidential nature? Or perhaps you just want to block out some uninterrupted time to work on a big project? If you are using ACT! in a multi-user environment, with others sharing the database, other users can view the activities you have scheduled. How can you stay on top of your day while still protecting your private information?

Private Activities

For personal or confidential activities, you can designate them as *Private*. While scheduling an activity, simply click the Private check box at the bottom of the dialog box. Activities marked private will display in your Task List and Calendar view just like any other activity, with the addition of a padlock icon displayed to the side.

Activities designated as private will not display in other users' Task Lists. However, if someone wants to schedule an activity that includes you, the Calendar will show that you are not available at that time. The time will be blocked and labeled with the word Private next to your name.

Once an activity has been labeled private, it carries that status with it throughout the system. So when the activity is completed and is moved into History, it will remain private.

ACT! Premium Extras

ACT! by Sage Premium allows you to assign Limited Access to a Contact, and select the users who have the right to view the Contact record and associated activities.

Remember, private activities are only private if you are in a multi-user environment, and each user logs in to the database with a unique user logon. Let us know if you have any questions, we are here to help. ✨