Act Custom Training Course

Basic Act Skills with reference to customizations also.– Session 1 (1:00 – 3:00 MST)

Opening Discussion – We are presenting a customized Act Database for the primary purpose of fielding and managing all constituent concerns, complaints and issues. The customizations have been designed based on the work flow of Jane Doe and her many recommendations. (We welcome your input if you see something else we can do to improve the system even further.) Our hope is that you will find this an easy and effective system to use.

Start the Class

1) **Contacts – the 'Rolodex of Act'**
    a) We are entering Parents, Teacher and all those who are involved in incident resolution.
    b) **Contact Data Entry – 1:20 PM MST (Duration 15 min)**
        i) <Insert> key
        ii) Special fields to consider upon data entry (*Required fields*)
            (1) ID/Status
            (2) Type
            (3) Below is what your custom layout will look like:


2) **Companies (**A way to group contacts into Districts, Schools etc) **1:35 PM Duration = 20m)**
    a) **Concept>** Act, by default, has setup companies to group related contacts, but we will be using this in our specific ways as indicated in the diagram to the right. Even though the table is called Companies, we will modify it's usage to support a connected view of Districts, Schools and issue related people
        i) How to> Linking People to Schools, Schools to Districts etc.
            (1) Link –. A contact can only be fully linked to one company, however, one Company can have many Contacts.
                (a) Co. name in Contact record as a hyperlink
                (b) All future history will be associated to the company record.

3) Illustration of 1-to-Many relationship of Company table to Contacts table.

(c) Linked fields between Co. & Contact are updated

(2) Explain and **Demonstrate** that the Company Table is above the Contact table (as in 1 to many)

(3) **Lesson>** Have them add a sample Parent to an existing Company
  (a) Point out how the School is subordinate to the District.
  (b) Why Company.Company Field **<>** Contact.Company.Field

(4) Divisions> Demonstrate this in hierarchal view

(5) Show Company List view with and without Divisions
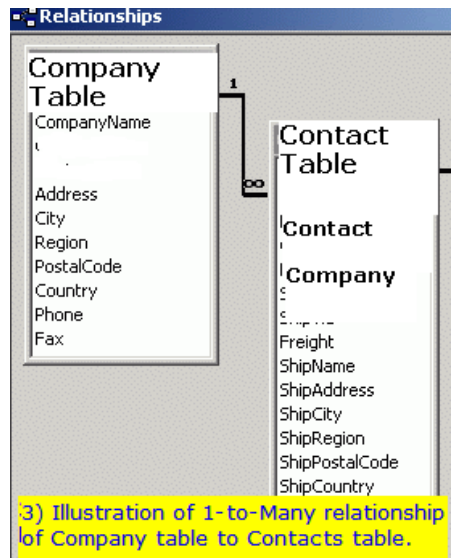
b) **Creating Company** – not being done be end user.
  i) Brenda will be centrally adding Districts/School for everyone
 ii) Please email her with requests to update this table

c) **Linking Contacts to Companies**
  i) When you are working with a Constituent.contact, you can fill out the fill out the Company/District field. (You don't have to link to Company Table if Company.Company not present)
  ii) If you wish to link it to an existing District etc, click the ellipse field and browse for it. {See diagram #4 for details}
  iii) If it is missing, then make the email request to Brenda.

d) Reselecting a Company Link
  i) If you linked to the wrong record (i.e. District) you can click the ellipse again and select another choice.

4) Linking Contact to Company
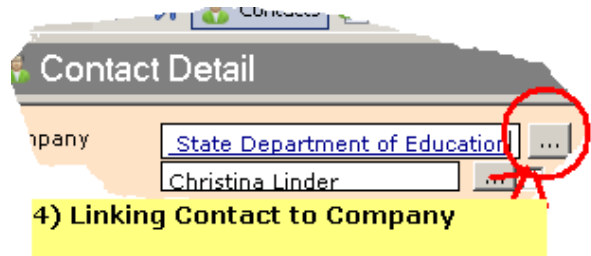
e) **Company Lookup of Districts, Schools or Vendor Start 1:55 PM Duration 15 min**
  i) **Concept>** You can't use the standard Contact Lookup menu for looking up Company Table info. Even though the Contact Record has a Company field, it is not same as the Company field on the Company Table. (See Diagram#3)
  ii) **How to>** From the main Lookup Menu, select the Company submenu (See diagram #5)
  iii)
  iv) **Lesson>Do sample** *them more on lookups* **Lookup with Class** *(Tell in next section)*

All these fields refer to the Contact record only.

5) Company lookup menu
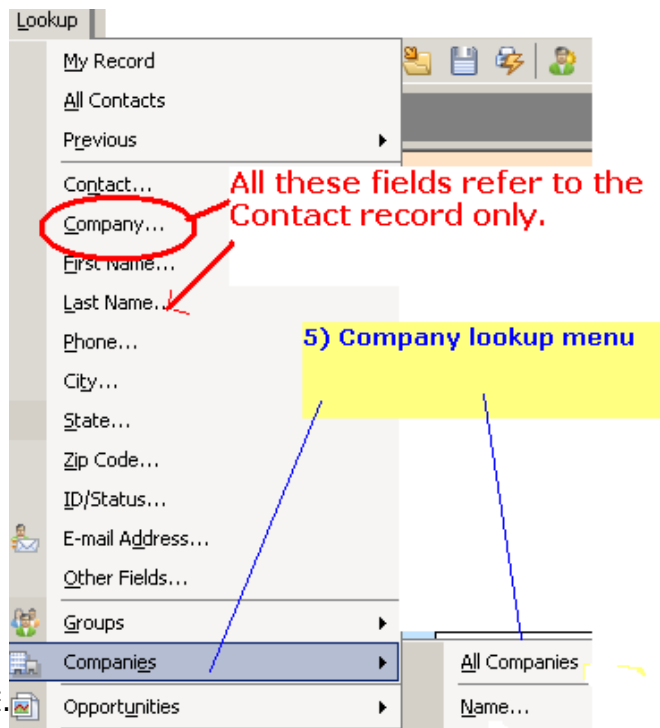
Name on this menu is actually Company.Name.

3) Lookups and Navigation – 2:15 PM (after 5 minute break?)(30 min)

a) **Concept>** A lookup is a collection of records isolated by a single criteria (or more complex set of criteria). All the rest of the records not fitting this criteria are temporarily hidden.

b) Alt + <u>L</u>ookup keyboard combo
   i) Very helpful for single criteria lookups
   ii) Once the Lookup menu, is open, just tap the letter of the item that you want to lookup on. Example Tap 'C" for <u>C</u>ompany
   iii) **Lesson>** Have the class do a few with you.
c) '<u>On Layout Lookups</u>' using Right Click
   i) Definition> Any field on the Act Layout can be 'Right-clicked' for a simple lookup
      (1) Can be done on Contact or Company screen.

Getting good use out of the 'Lookup Contact' window…..
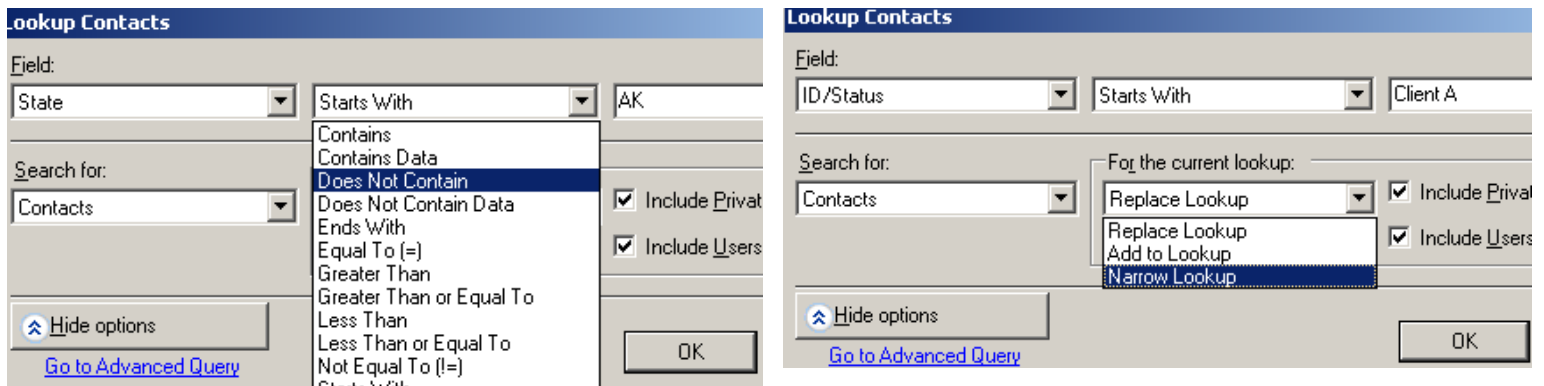
Note that in the above left diagram, you have numerous option on the specific lookup criteria to use. On the diagram to the right, on a *second pass lookup, we can narrow the existing lookup or even add another lookup to it.
*Second Pass- Example, on the first lookup you choose a state, such as NY and get 120 records returned in that lookup. On the second lookup you choose ID/Status = 'Difficult Contact'. Before clicking <OK>, you could then choose 'Narrow Lookup' to find only that ID/Status in the NY area, not the entire database.

Exercise> Walk them through these lookup combos.

End of Sample training documentation