

ACT!2000 ContactRelationships

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Installation and Usage

ACT!2000 **Contact Relationships** provides an easy way to track the other contacts that each person is related to, and the type of relationship they have.

ACT!2000 provides excellent tools to manage YOUR relationship with each contact in your database. However, if you need to keep track of how those contacts are related to each other, ACT! does not provide very useful tools.

Contact Relationships shows you a list of all the other contacts in your database that the “current contact” is related to, and the nature of that relationship. You can select any number of those related contacts, and create a lookup consisting of their records. You can add new relationship “types”, and you can add and remove individual contacts or sets of contacts to any relationship type with the current contact. It even keeps track of the “reverse” relationship, automatically (such as “Is Parent Of” and “Is Child Of” or “Interviewed” and “Was Interviewed By”) – you set the “reverse relationship” when you add a new relationship type!

Contact Relationships comes with some common relationships pre-loaded: “Supervises / Reports To”, “Referred us to” / Referred By”, and “Is Married To”/“Is Married To”).

Installation

1. Shut down all running programs
2. Run **Install_ContactRelationships.exe**
3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg>ContactRelationships.exe** on your hard-drive, and add the ContactRelationships.exe program as an ACT! custom



command. It will also put the ContactRelationships icon on the toolbar, and adds “ContactRelationships” as an item on the Edit menu, of the Contacts View.

Usage

Start ACT! and open any database. When you are looking at a contact whose



relationships you are interested in, click the ContactRelationships icon on the toolbar, or select the ContactRelationships option from the Edit menu. You will see a list of the existing relationships in which the current contact participates. Use the Click, Ctrl-Click or Shift-Click keyboard-mouse combinations to select one or more contacts displayed, then click the [Lookup] button to create lookup of those selected contacts and return to ACT!.

Or, click the [Modify] button to see a list of contacts (either “All Contacts” or the “Current Lookup”, depending on your selected option) showing either Company/[Contact Name] or Contact Name/[Company] (depending on your selected option). Change either of these options to show your desired information. Dropdown the list of existing Relationship Types, or add a new type by clicking the [New] button. Select the relationship you need, and see the list of contacts currently related to the current contact by that relationship. Add one or more contacts from the list on the left to the selected relationship type, or, remove one or more of the currently “linked” contacts from the list on the right. (The reverse relationships are automatically added and removed for you.)

When you are done modifying the relationships for that contact, click the [Done] button to return to the display of existing relationships. Keep the program running - as you change contacts in ACT!, the display will show the current relationships for the current contact!