

Copy Opportunity To Lookup for ACT! by Sage

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Installation and Usage

Copy Opportunity To Lookup adds the selected Sales Opportunity to every contact in the current contact lookup. Quickly and easily add hundreds of opportunities with the click of the mouse!

Although the ACT! forecasting capabilities, using Sales Opportunities, is quite powerful and flexible, it can be rather tedious when you want to create an identical Opportunity for a number of different contacts.

Copy Opportunity To Lookup allows you to select any opportunity from those assigned to the My Record of the current user, and copy that opportunity to every contact in the current lookup.

Installation

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

This will create (if necessary) the \TNHG subfolder within the folder that Windows “knows” as the “Program Files” folder – usually C:\Program Files. It will create the \TNHG\CopyOpportunityToLookup subfolder. The installation process will also copy into the \ACT\Act for Win 7\Plugins subfolder and into the \ACT\Act for Windows\Plugins subfolder (within that same “Program Files” folder) the supporting files necessary to operate within ACT! by Sage.

Usage

On your My Record, create an opportunity to use as the “template” or “master” that is to be copied to each of the other records. Include all products, details and opportunity fields that you want to appear on the opportunities that will be created for each contact in the lookup.

Use the Lookup menu to create a lookup of contacts to which you want to copy that master opportunity.

Select the *Contacts > Opportunities > Copy Opportunity To Lookup* menu item to open the **Copy Opportunities To Lookup** window.



The window will show a list of opportunities from your My Record. Scroll (if necessary) thru the list and select the desired opportunity by clicking in the left-most column of the list. (You can re-order the list by clicking any of the column headings in the list.) When the desired opportunity is highlighted/selected, click the [Copy] button. You will see a “confirmation window”, informing you that the copy operation cannot be undone, and asking you to confirm you decision to copy the selected opportunity to every contact in the current lookup. Click [No] to cancel the operation, or click [Yes] to start the copy operation.

When all contacts have received their new opportunity, the window will close.