

ACT!2000 CopyNote

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Installation and Usage

ACT!2000 CopyNote provides the capability to generate a Last Results field entry based on the date and first few characters of the latest Note entered for a contact.


While the ACT! Note feature allows a user to enter exhaustive notes about conversations and meetings with contacts, it is often beneficial to have a readily accessible "current status" or "last result" summary of "where things stand" with a contact. It may be inconvenient and time-consuming to search the Notes and History for the latest Note, to read the note, and then to summarize its content into a "current status". And, a user is often unwilling to re-enter the summary statement in a different field.

CopyNote allows the user to complete making the note entry, then, after adding a summary statement to the beginning of the Note, with the click of an icon, the date and summary statement are copied to the "Last Results" field in the ACT! database and layout, making it readily available and easily accessible, until it is replaced with the next Note summary statement.

Installation

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

This will install **c:\program files\tnhg\copynote.exe** on your hard-drive, and add the copynote.exe program as an ACT! custom command. It will also put the

CopyNote icon  on the Contact View toolbar.


The first time you use CopyNote, you will be asked if you want to include the User's Name in the Last Result field. Your answer is saved in the c:\program files\tnhg\tnhg.ini file. If you need to change your selection later, you can edit the tnhg.ini file and remove the "Include User" entry. The next time you run CopyNote, you will be asked again, and can change your answer.

Usage

Enter an ACT! Note for a contact

Using any of the multiple means available in ACT!, enter a new note for a contact in ACT!. After completing the note, use the CTRL-Home key combination to reposition the cursor at the beginning of the note text. Type a short (about 35 characters or less) statement that summarizes the contents of the note.

Create the Last Results field entry

Click the CopyNote  icon on the Toolbar. The date and summary statement are copied to the Last Result field. If your database field definition is set to "Create History" for the Last Result field, a history record is entered as well.