

Default Detail Writer for ACT!

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Installation and Usage

Default Detail Writer for ACT! enters user specified default entries into the Details field of an Activity or Sales/Opportunity, or as the text of a Note.


Many organizations have determined a set of detailed information required or desired for each new Activity or Sales/Opportunity (such as “Objectives:”, “Results:” and “Next Steps:”) The consistency of the formatting of such entries significantly effects the ease and accuracy of reporting.

Default Detail Writer provides a quick and easy way to enter these defaults into the Details field of any selected Activity or Sales/Opportunity, or as the text of any Note.

Installation

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

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


command. It will also put the Default Detail Writer icon  on the Contacts View toolbar and the Groups View toolbar. Default Detail Writer is also added to the Edit menu in the Contact View, and the Group View.

Usage

The first time you run Default Detail Writer, you will be asked to specify the file that will hold your Default Detail texts. The default folder location is the `c:\program files\tnhg` folder. If you want the default detail text strings to be shared by multiple users on a network, change the folder location to a folder that is available to all the users who need access to it. (The suggested name for


the file is `DefaultDetailWriter.ini`, but of course you can use another name if you wish.

To add the Default Details text to a Sales/Opportunity record, to a Call, Meeting or To-Do, or to a Note:

1. Select the appropriate tab in either the Contact View or the Groups View of ACT! (5.0.2 or higher).
2. Select/highlight the record to which you want to add the text.
3. Click the Default Detail Writer icon  on the tool bar or select the Default Detail Writer option from the Contact or Group menu.

NB: The Default Detail Writer may not function properly if the Schedule Activity window or the Sales Opportunity window is open. It is best to close these windows (thereby saving the basic information about an activity or sale/opportunity) then select the desired item before running Default Detail Writer.

To set or reset the text of the default details for a particular type of entry:

1. Select the appropriate tab in either the Contact View or the Groups View of ACT!.
2. Click the Default Detail Writer icon  on the tool bar or select the Default Detail Writer option from the contact or Group menu **without first selecting an individual item.**
3. If you have selected the Activities tab, select the type of activity for which you want to set the default text.
4. Click the [Set Default] button.
5. Enter the text you want to appear as the default for the details for the selected type of entry. ***Some special "functions" are available to produce variable and/or special results. Include \$Date where you would to see the date when the default details were written, \$Time to see the current time when the default details were written, \$User to see the Logon ID of the ACT! user who wrote the default details, and \$NL to produce a new line of text.***
6. When the text is as desired, click the [OK] button to save the new text and return to the Default Detail Writer main window.
7. Click [Cancel] to close the Default Detail Writer window.

To change the location of the Default Detail Text file:

The location of the default detail text file is stored in the `c:\program files\tnhg\tnhg.ini` file, in the section labeled [DefaultDetailWriter]. You can open the `tnhg.ini` file in any text editor, and delete the line that starts with `DDW Filename`. The next time you run Default Detail Writer, you will be asked to specify the location of your Default Detail texts (see above). *NB: Make sure to delete ONLY the DDW Filename line in that `tnhg.ini` file, and be careful not to disturb other settings.*