

ACT!2000 EmailStatusReport

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Installation and Usage

ACT!2000 EmailStatusReport provides a quick and easy way create an eMail message containing a Contact "Status Report" in Microsoft Outlook 2000 or higher.

EmailStatusReport composes an email message with a "Current Status Report" for the ACT! "current contact" in Microsoft Outlook 2000 (or higher).

The subject line contains the contact's Company name and Contact name.

The body of the message contains the contacts Company, Name, Address (including city, state and zip), and either Detail or Summary history for the date range you select, plus a list of scheduled activities for a date range you select.

After generating the message, Outlook is opened with the message displayed so you can either pick a recipient and send the message, or print it directly to your attached printer.


Installation

NB: Both ACT!2000 (or later) and Microsoft Outlook 2000 (or later) must be installed and functioning before installing EmailStatusReport, or the installation process or operation of EmailStatusReport may fail.

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

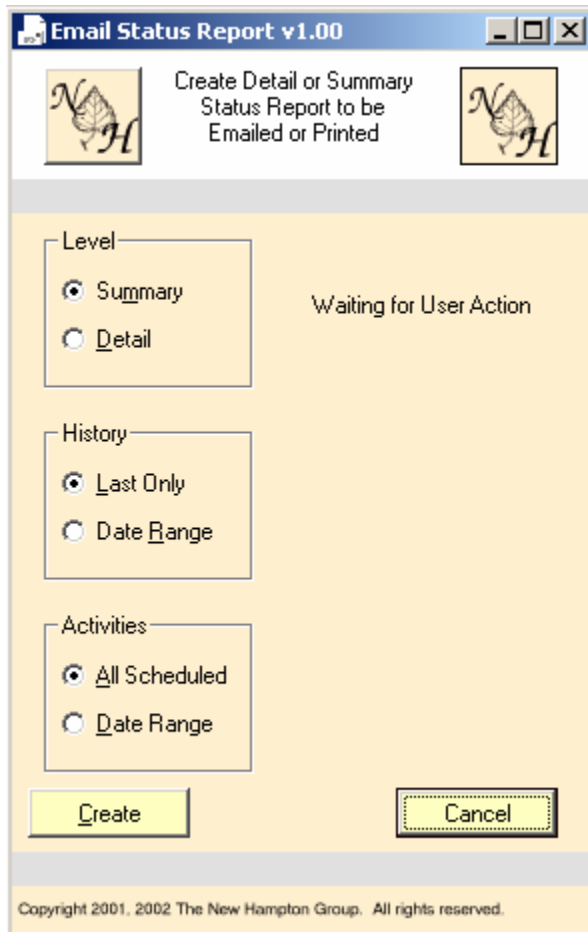
(NB: Near the end of the installation process, you MAY see a window informing you that the MSVCRT.DLL failed to self-register. This message can safely be ignored - it should not effect the performance or operation of EmailStatusReport. We are working on eliminating this inconvenience.)

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

command. It will also put the EmailStatusReport icon  on the Contact View toolbar, and add EmailStatusReport to the Contact view's Write menu.

Usage

Click the EmailStatusReport icon  on the Toolbar. You'll see the EmailStatusReport screen:



If you would like to use all the default options, just click the [Create] button to create the email message with the report. Otherwise, adjust the selections as described below before clicking [Create].

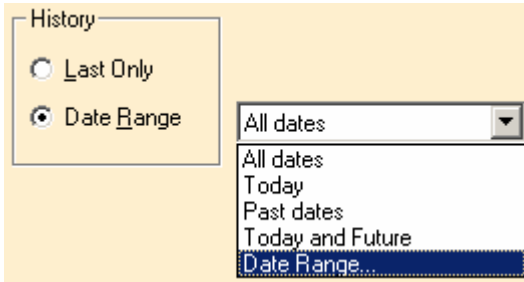
Level

When **Summary** is selected, the history section of the report will contain only "Last Results" field change entries from the selected date range (see below). When **Detail** is selected, the history section will contain the full text of all Notes from the selected date range.

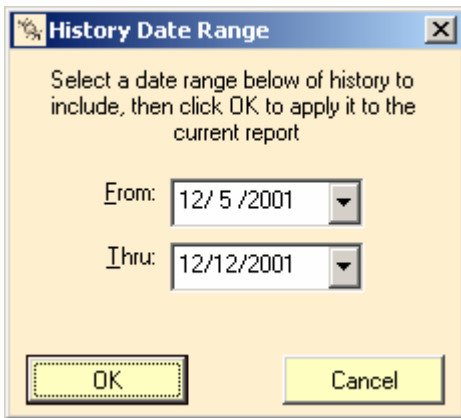
History Option

When **Last Only** is selected for History, the history section of the report will contain only the most recent entry of the Notes and History, as determined by the

Level selection (see above). If **Date Range** is selected, another dropdown list appears, allowing you to select any date range you want:



Select any of the “generic” date range choices (the history created on the dates you pick WILL be included in the report). If you pick **Date Range ...** again, another window opens that allows you to select any specific From and Thru date:



You can directly enter any date you wish into the From and Thru fields, or you can click on the dropdown arrow to display a calendar:



You can click on the month name to show a dropdown list of month names to choose from. You can click on the year to show scroll buttons to change the year. You can click the left and right arrows to move forward and backward one month at a time. When you click on a specific day on the displayed month, the window disappears and the selected date is entered into the Date Range window field you chose.

Activities

When **All Scheduled** is selected for activities, all uncleared activities scheduled with the current contact will be included in the report. You can limit which uncleared scheduled activities will be included by selecting the **Date Range ...** option. See the explanations above for the selecting a specific date range.

Create

When you click the [Create] button, Outlook 2000 (or higher) starts, and a new message is created with the company and contact from the "ACT! current contact" in the subject and the actual report in the body of the message. (The report formatting is best preserved if you choose "Plain Text" formatting and Courier New font.) You can use your standard techniques in Outlook to select the recipient(s) and to send the message.