

ACT!2000 HistoryLookupPlus

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Installation and Usage

ACT!2000 HistoryLookupPlus creates an ACT! Group whose members are contacts selected because they had history of the type or types you select, created during the date range you select, by the user or users you select.

The ACT! Classic History Summary report provides an easy way to see how many calls were made, meetings were held and letters were sent by the users you select during any date range you select.


However, there is no way in ACT! to narrow down the report so that you don't get a lot of lines with all zeros, and still get all the contacts that had some action.

HistoryLookupPlus provides a quick and easy way to select just those contacts you want, based on which type or types of history was created (and/or Sale Opportunity created, lost or won) during a selected date range by one or more selected users.


Installation

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

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

command. It will also put the HistoryLookupPlus icon  on the Contact View toolbar, and adds HistoryLookupPlus to the Contact View Lookup menu.

Usage

While on the Contact view in an ACT!2000 database, start HistoryLookupPlus by clicking on the HistoryLookupPlus  icon on the toolbar, or by selecting HistoryLookupPlus from the Lookup menu.

Select the type of history creation of interest. HistoryLookupPlus will remember what you used last time, and have those types pre-selected for you. Use the [Select All] button to select ALL types of history. Use the [Unselect All] button to de-select all types. You must have at least one type selected before you can perform the lookup.

Select the date range of interest. From the dropdown list, pick the appropriate date range choice. If you choose “Date Range ...” from the list, you will get another window where you will specify both the From and Thru dates. (These dates ARE included in the results.) You may either type in the exact date you want for each, or you can click the small button with a down-pointing triangle in it at the right end of the date field. Clicking this button opens a Calendar window. You can select a different month using the arrows, or by clicking on the month name and then selecting a date from the list. You can select a different year by using the arrows, or by clicking on the year and then scrolling up or down using the arrows. Once you see the month and year of interest, click on the day of interest to close the calendar window and load the selected date into the date field. Repeat this process for the other end of the date range of interest. When both dates are set to your liking, click the [OK] button.

Select the users of interest, who created the history. Click the [Select Users ...] button to open a window where you can choose either “All Users” or “Selected Users”. If you choose “Selected Users”, you can select as many users from the list as you like, using the Ctrl-click key-mouse combination.

When you have made your choices for types, dates and users, click the [Lookup] button to perform the lookup. A window will appear telling you how many contacts were found based on your selections, and asking if you want to create the Group holding those contacts as members. If you want to use the results of your lookup, click [Yes], and a group will be created, named “Active from *fromdate* to *thru date*, and a window will appear telling you about the new group. A “progress bar” and status message display keeps you informed during this process – very large groups can take a few minutes to create!

When done, you can make different selections and run another lookup, or click [Done] to leave HistoryLookupPlus.