

ACT!2000 NonMemberContacts

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Installation and Usage

ACT!2000 NonMemberContacts provides a quick and easy way to find all the contacts that are NOT members of a selected set of groups.

There are lots of ways to find all the contacts that are not in ANY group in your ACT! database, but it is very cumbersome and time consuming to locate all the contacts that are not members of just a selected set of groups. For example, if you use groups for Companies, and for Territories, and for other sets of contacts, you might to locate all contacts not currently assigned to any territory. Finding all the contacts not in any group will miss some of those “territory-less” contacts, if they belong to a Company group.


NonMemberContacts allows you to evaluate all groups, or to select a specific set of groups to evaluate, and then locates all the contacts that have no membership in that set of groups.

After locating the contacts, you can add those located contacts to a new or existing group. You can also create a ACT! Contact Lookup of those located contacts.

Installation


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

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

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

Usage



Click the NonMemberContacts  icon on the Toolbar. If you need to locate all the contacts not in ANY group, leave the selection set to “All Groups”. If you need to search just a specific set of groups, click the “Selected Groups” option, then select one or more groups from the list (use the Ctrl-Click and Shift-Click key-mouse combinations to select more than one group).

When you have the desired groups selected, click the [Locate] button. NonMemberContacts will evaluate the designated groups and produce a set of contacts that do not have membership in any of those groups. The status display then tells you how many contacts were located.

If all you need is the count, you are done, and can click the [Cancel] button to shut down NonMemberContacts.

If you need to save the set for later processing, you can use the preloaded group name or change it to something more descriptive, then click the [Create Group] button – NonMemberContacts will check to see if the group already exists and will add a new group, if necessary, and then add the located contacts to the designated group. The status “barometer” shows you the progress as this process is performed.

If you would like to use the located set of records (but don't need to save it for later processing), you can click the [Create Lookup] button. NonMemberContacts will create an ACT! Contact lookup consisting of the located records. When you click [Cancel] and return to ACT!, that will be your “current lookup”.