

ACT!2000 ReassignActivities

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Installation and Usage

ACT!2000 ReassignActivities allows you to reassign selected activities “en masse” from one user to another user in the same database.

ACT!2000 activities are each assigned to an individual user – the user the activity is “scheduled for”. You can change the user an activity is “scheduled for” by selecting an activity in any of the various ACT! views, and then using the “Reschedule Activity” facility.

There are times, however, when more than one activity may need to be reassigned. For example, if a sales rep or account manager (user) leaves the company or is promoted, or when sales territories are re-aligned, ALL the activities for each contact needs to be re-assigned to the new user responsible for that contact.

If all the contacts in a specific city, or area code, or zipcode, are to be reassigned to a different user, then all the activities associated with those contacts need to be reassigned also.

ReassignActivities provides a means to quickly and easily perform this reassignment of activities.

Installation

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

This will install **c:\program files\tnhg\ReassignActivities.exe** on your hard-drive, and add the ReassignActivities.exe program to the Programs menu on your Start button. You may add an icon for the program to your desktop, if you wish.

Usage

Start ReassignActivities by selecting it from the Programs menu on your Start button. ACT! does not need to be running to use ReassignActivities.

The database you used most recently for reassignments will be displayed. You will be asked for a LogonID and Password. If you do not want to use the displayed database, click the [Cancel] button, and the database will not be opened. You can click the [Browse] button to select any ACT!2000 database available to you.

When you open a database, ReassignActivities checks that database to see if you have Administrator privileges. If so, a list of all users is displayed in the "Reassign Activities FROM" list (with your name pre-selected) so you can choose whose activities to display. If not, your name is automatically displayed and is pre-selected. All uncleared activities assigned to the selected user are displayed in the grid, sorted/ordered by Company name.

You can select a different user from the "Reassign Activities FROM" list (if you have administrator privileges), and the grid display will be refreshed with that user's uncleared activities.

You can re-sort/re-order the list of activities by clicking on the column heading of the column you want to use for the sorting/ordering (only ascending sorts are available in this version of ReassignActivities). This will help "group" items for re-assignment.

Select one or more activities from the grid by clicking in the gray box in the first column of the grid, on the row displaying the activity to be reassigned. Use the Shift-click key-mouse combination to select multiple entries in sequence. Use the Ctrl-click combination to select other multiple entries.

When you have the items selected that need to be reassigned, select the user to receive the assignments from the "Reassign Activities TO" list. (You can do this before completing your activity selection, if you want, but both the activities and the "receiving" user need to be selected before you click [Reassign].)

Click the [Reassign] button. All the selected activities will be reassigned to the selected user, and the remaining activities for the "Reassign Activities FROM" user will be displayed in a refreshed grid. Select more activities to reassign to the same user or to a different user. Repeat this process until all the activities are reassigned.