

ACT!2005 Select-A-Quote

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Installation and Usage

ACT!2005 Select-A-Quote provides a quick and easy way to select which previously designed and saved quote template is to be used as the “default” template for the next “Create Quote” operation.

An ACT! opportunity can be presented in the form of a “quote”, and ACT! provides a basic quote template as part of the installation. However, if you need to use different quote formats in different situations, there is no convenient way to select the quote template to use each time a quote is generated.


“Select-A-Quote” makes it easy to specify which quote template should be used to generate the next quote, and to easily switch from one quote template to another.

(Please refer to the ACT!2005 documentation for more information on quotes, quote templates and other opportunity related topics.)

Installation

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

This will create the `\TNHG` folder and `\TNHG\SelectAQuote` folder within the Windows “Program Files” folder (usually `c:\program files`) and add the `SelectAQuote.dll` file to that subfolder, along with all the necessary supporting files.

It will also add the `SelectAQuote.dll` (and supporting files) to the `\ACT\ACT for Win 7\Plugins` folder in the Windows “Program Files” folder (usually `c:\program files`), and add “Select-A-Quote” to the Contact View Contact menu, Opportunities sub-menu. And, it will add the Select-A-Quote icon  to the Contact View toolbar.

Usage

Select-A-Quote works with existing quote templates, so you will need to prepare your specific custom quote templates before using Select-A-Quote.

Preparation

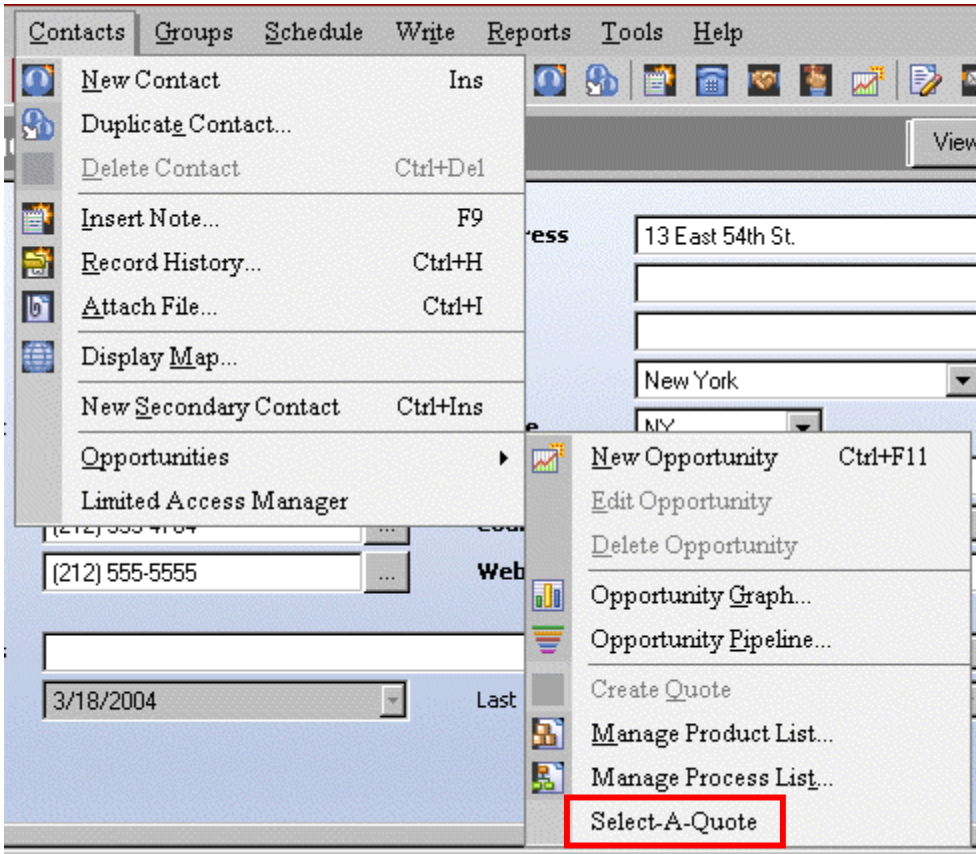
Each ACT! “quote template” actually consists of 2 separate, but related, files – a MS Word document template (.adt) and a MS Excel spreadsheet template (.xlt). These template files are not only related to each other, they are also “related” to the specific database whose opportunities they will display. Therefore, they are stored “under” the database, in the database specific “related” folders, in the `\Templates` subfolder. For example, if your database is stored in the `S:\ACT\DB` folder and is named `XYZContacts`, then there is also a folder named `S:\ACT\DB\XYZContacts-database files\Templates` in which the quote template files are stored.


When you customize a quote template, it is best to start with the existing `\quote.adt` and `\quote.xlt` files. Select or highlight the `quote.adt` file, tap {Ctrl-C} to copy then {Ctrl-V} to paste. This will create a file named “Copy of `quote.adt`”. Right-click that file, choose Rename. Tap the {Home} key to move the cursor to the beginning of the file name. Prepend the specific name that you want this quote template to have, so that the name looks something like `EstimateQuote.adt` or `ServicesQuote.adt`. Repeat this process for the `quote.xlt` file, being careful to make sure that the names of the two files are EXACTLY the same, except for the file extensions (.adt and .xlt). Now, repeat the process for any other template that you will need.

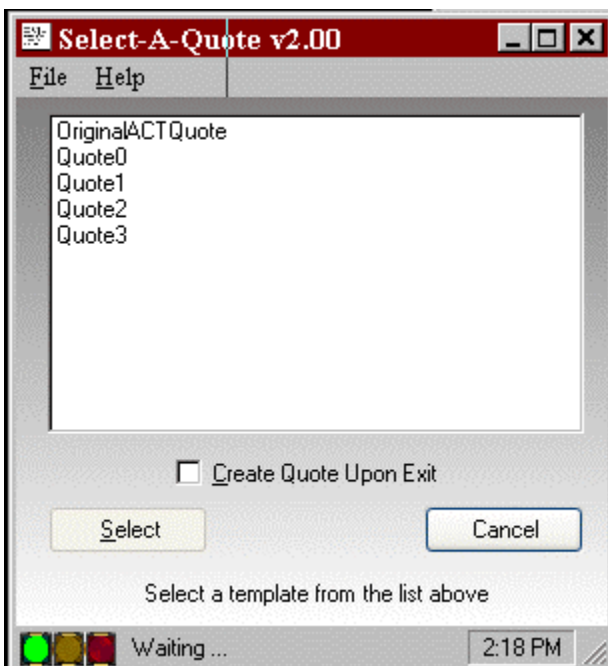
Select-A-Quote always looks in the `\databasename-database files\Templates` folder for “pairs” of files whose “names” are the same, and whose extensions are .adt and .xlt. Select-A-Quote.

Selecting a specific quote template

From the Contact menu, select the Opportunities submenu, and the Select-A-Quote option:



or click the Select-A-Quote icon  on the Contact Detail View toolbar, to open the Select-A-Quote window:



Select one of the quote templates displayed in the scrolling list.

The “Create Quote Upon Exit” option allows you to immediately create a quote, using the selected template and the currently “active” opportunity displayed in the Opportunity tab of the Contact Detail View. If no opportunity is “active”, then this option is ignored.

After selecting the quote template to be used for the next quote, and indicating whether or not to immediately create a quote, click the [Select] button to make you selection active and close the Select-A-Quote window. Or, click the [Cancel] button to close the window without switching the “active” quote template.

Please refer to the ACT!2005 documentation for more information on Quotes and other Opportunity related topics.