

ACT!2000 UntouchedContact

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Installation and Usage

ACT!2000 UntouchedContact creates an ACT! Group whose members are contacts selected because their records were not updated during the selected date range, based on the selected types of updates – contact record edit date, note/history date, and/or Activity create date


When a field on an ACT! contact record is updated, ACT! automatically updates that record's "Edit Date". You can use this field to locate all the contacts that were or were not updated in any desired date range. However, this field is NOT updated when a note or history is entered, or when an activity is created.

UntouchedContact lets you pick which of these edit types should be used in selecting contacts with no activity during the date range you select. It then creates an ACT! Group with those contacts as members.

Installation

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

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

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

Usage

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

Select the type of edit date of interest. You must have at least one type selected before you can perform the lookup.

Select the date range of interest. 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 you have made your choices for edit types and dates, click the [OK] 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 “No activity from *fromdate* to *thru date* as of *today’s 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 UntouchedContact.