CREATING COMPANY RECORDS & GROUPING CONTACTS

In this lesson you will learn the following company record and group techniques:

- ☑ Creating company and division records
- ☑ Associating and linking contacts to companies
- ☑ Duplicating company and division records
- ☑ Using the Company Lookup command
- ☑ Using Companies and Groups trees
- ☑ Creating groups
- ☑ Adding contacts to a group
- ☑ Managing group notes and attachments
- ☑ Saving the result of a lookup as a group or company
- ☑ Creating subgroups
- ☑ Converting a group to a company
- ☑ Using the Convert Groups to Companies Wizard

LESSON 3

Differences Between Companies And Groups

In this lesson you will learn how to create company and group records. On the surface they may appear to be the same and have the same functionality, but there are some differences. Company records have more functionality than group records. To start with, company records have more fields which can be used to automatically fill in (link) fields on a contact record. The opposite is also true. Fields on a contact record can be used to fill in fields on a company record. Company and group records cannot have the same name. Creating a group is like saving a lookup. When you view the contacts from a company or group detail view you can see the notes, activities and opportunities for the contacts in the company or group on one tab.

Company And Divisions Overview

Company records allow contacts in the company to be managed easier. If a company has a lot of contacts, it may be easier to manage the contacts if divisions were created for the company. Brick and mortar companies have divisions, departments and business units. Companies in ACT! can have them also. You can create companies and divisions that best meet your needs. It is also possible that you may not need any companies or divisions.

The **COMPANY** record type allows you to keep track of contacts in the same company. In a way, a company record is similar to a group. This may be why the groups and companies are on the same tab. You can see all of the companies and groups except dynamic groups that a contact is a member of. It would be nice if there was a way to know if the entries on this tab are a company or group. Contacts can be associated with more than one company.

An example of when you would associate a contact to more than one company would be if one consultant did work for multiple companies that are in your database. You can create activities, notes and opportunities, as well as, attach documents to a company record. In ACT! any of the following are acceptable ways to categorize contacts in a company. I am sure that you can come up with several others.

① Create divisions that are like the divisions in a brick and mortar company.
② By title.
③ By contacts home state.
④ By ID/Status.

In addition to being able to create 15 levels of divisions, you can also create **SUBDIVISIONS**. This type of category lets you further divide the contacts into groups that are easier to manage. An example of when it would be appropriate to create subdivisions would be for a company that has 1,000 sales reps. I would create a division called "Sales Reps". I would then create subdivisions for each of the product lines the company has like telephones, digital cameras, camcorders and televisions. Then I would add the reps to the appropriate subdivision(s) based on the product line(s) that the rep sells. As you can see, divisions and subdivisions allow you to organize contacts in the way that works best for you.

A contact that is in a division does not have to also be part of the company. This means that you can add a contact to a division without being required to add it to the company. Divisions are independent of the company they are under.

Company Toolbar

Each view has its own toolbar. Many of the buttons on the toolbars are the same. Figure 3-1 shows the Company toolbar. Table 3-1 explains the buttons on the toolbar.

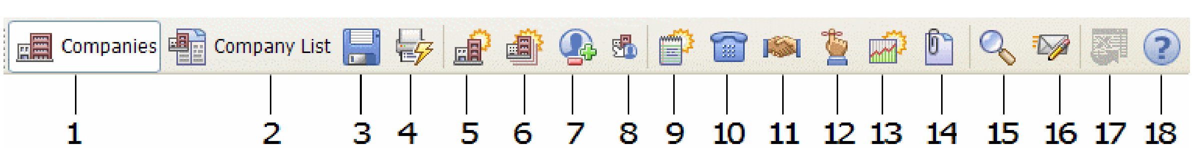


Figure 3-1 Company toolbar

Button	Description
1	Opens the Company Detail view.
2	Opens the Company List view.
3	Saves the record. (1)
4	Opens the Print dialog box.
5	Opens a new company record.
6	Opens a new division record.
7	Add or remove a contact.
8	Updates the linked contacts for the selected company.
9	Add a note for the company record.
10	Schedule a telephone call.
11	Schedule a meeting.
12	Schedule a To-Do.
13	Create a new opportunity. (1)
14	Attach a file to a company record.
15	Creates a contact lookup for the company.
16	Compose and send an email.
17	Exports the company list to Excel. (2)
18	Opens the Help system.

Table 3-1 Company toolbar buttons explained

(1) This option is only available from the Company Detail view.
(2) This option is only available from the Company List view.

The Companies Tree

This tree displays all of the companies, divisions and subdivisions in the database as shown in Figure 3-2.

The Companies tree is on the left of the Company Detail view. At the top of the Companies tree, the number of companies and divisions in the database are displayed.

A plus sign in front of a company means that there is at least one company or division below it. If you click on a company in the tree, you will see the detail information for the company on the right side of the window.

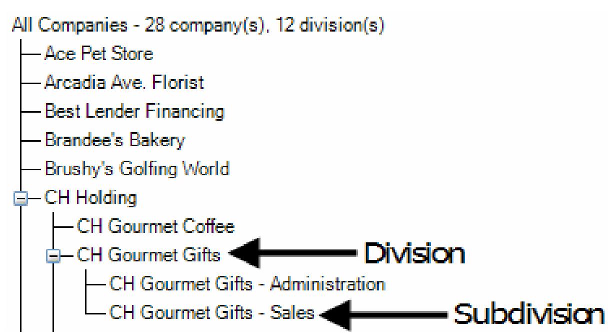


Figure 3-2 Companies tree

You can use the tree to complete several tasks including moving, creating and deleting a company. Any task that you can do for a company, you can also do for a division or subdivision. Like other features in ACT!, the Companies tree has a shortcut menu as shown in Figure 3-3.

Company records in the Companies tree may or may not contain the same companies that you see in the Contacts view. For example, in the Contact List view you will see the following companies, Cadbury, County Tennis Supplies and Liberty. If you look in the Companies tree, you will not see an entry for these companies. It is not a requirement that every company have a company record.

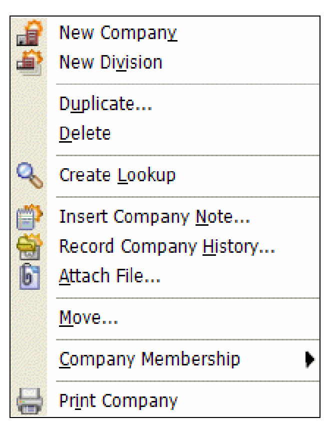


Figure 3-3 Companies tree shortcut menu

The Company List view displays all of the companies in the database. Like the Contact List view, you can sort on the column headings in the Company List view. If there are a lot of companies in the list you may have a need to filter them.

Create New Contact Records

To complete some of the company exercises, you need to add new contact records to the database.

1. Create contact records for the following names. You only have to enter the name.
   John Doe, Jennifer Doe, Charles Smith, Mary Wood, Bill Grant.

2. Create contact records for the following names: Laura Smith and Tom Wood. Type `Lookup` in the Company field for these two records. They will be used later in this lesson to lookup contacts and link them to a company.

Exercise 3.1: Create A Company Record

1. Click the **COMPANIES** button on the Navigation bar.

2. Click the **NEW COMPANY** button on the toolbar, then create records for the two companies in Table 3-2. The first record should look like the one shown in Figure 3-4.

Field	Company #1	Company #2
Company	My Company	My Other Company
Address	123 Main St	456 South St
City	Hitsville	Hollywood
State	CA	CA

Table 3-2 Company record data

The **HIERARCHY** field will automatically fill in.

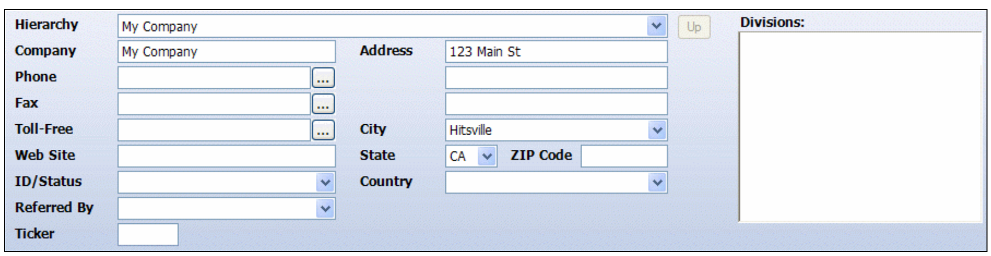


Figure 3-4 New company record

ACT! prevents you from creating duplicate company records. If you enter a company name that already exists, you will see the warning message shown in Figure 3-5. This gives you the option of linking to the company record that already exists.

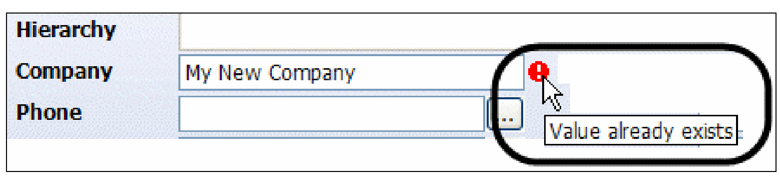


Figure 3-5 Duplicate company warning message

Exercise 3.2: Create Divisions For A Company

Creating a division uses the same screen as a company record.

1. Display the company record that you want to create a division for. For this exercise click on the company My Company, in the Companies tree.

2. Click the **NEW DIVISION** button on the toolbar.

3. Type the division name in the Company field. For this exercise type `Finance` in the Company field.

4. Create the divisions in Table 3-3 under the correct company.

Division	Company
Technology Division	My Company
Marketing	My Other Company
Sales Division	My Other Company

Table 3-3 Divisions to create

Associating Contacts To Companies And Divisions

Contacts can exist in an ACT! database without being linked to a company. Companies can be in an ACT! database without having contacts linked to them. There is no requirement that contacts and companies be linked, so don't be alarmed if you have contact records that are not linked to company records or vise versa. Although, I'm not sure why someone would create a company and not associate any contacts to it, but it is acceptable in ACT!. There are two ways to associate contacts to companies as discussed below.

① **Manually** This method entails creating the link between a contact and a company. ACT! refers to this type of link as a **STATIC** link. That is because the link will remain intact until you manually change it.

② **Automatically** This method entails creating a query that selects the contact records that will be linked to a company. ACT! refers to this type of a link as a **DYNAMIC** link. This is because the contacts associated to a company will change automatically, depending on whether or not the data in the contact record meets the criteria in the query. A contact record can meet the criteria in the query this week and not meet the criteria next week if the data in any of the fields that the query uses, changes. You will learn how to create this type of query in Lesson 8.

Exercise 3.3: Associate A Contact From A Company Record

There are several ways to associate contacts with a company. In this exercise you will learn different ways to accomplish this task. Contact records can be associated to companies from the contact record. The opposite is also true. Contact records can be associated to companies from the company record.

1. Open the company record for My Other Company in the Company Detail view. On the far right of the view you should see the two divisions that you created.

2. Click the Add/Remove Contacts button on the toolbar or the same button below the tabs.

3. Click the **CONTACTS** button, then type `Doe` in the Look for field. Select the contact record for John Doe.

4. Click the Add button, then click OK. The contact should be in the **STATIC MEMBERS** section of the dialog box as shown in Figure 3-6. Click OK. You will see the contact on the Contacts tab in the Company Detail record.

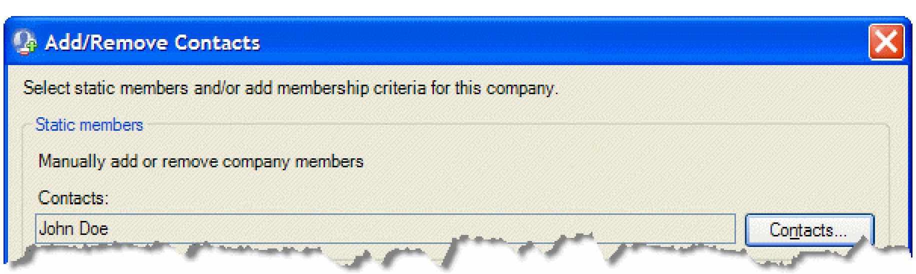


Figure 3-6 Add/Remove Contacts dialog box

Other Ways To Open The Add/Remove Contacts Dialog Box

From A Company View
① Companies ⇒ Company Membership ⇒ Add/Remove Contacts.
② Right-click on the company name in the Companies tree and select Company Membership ⇒ Add/Remove Contacts.
③ On the Contacts tab, right-click and select Company Membership ⇒ Add/Remove Contacts.

From A Contact View
① Companies ⇒ Company Membership ⇒ Add Selected to Company. You will see the dialog box shown in Figure 3-7.
② On the Groups/Companies tab, select Companies and Divisions from the **SHOW MEMBERSHIP FOR** drop-down list, then click the Add Contact to Company button, as shown in Figure 3-8.
③ On the Contact List view, right-click and select Add Contacts to Company. You will see the dialog box shown in Figure 3-7.

The entries in the **IS A MEMBER OF** list are companies, divisions and subdivisions that the contact is a member of. I find this dialog box helpful because you can add and remove companies and divisions for the contact at the same time.

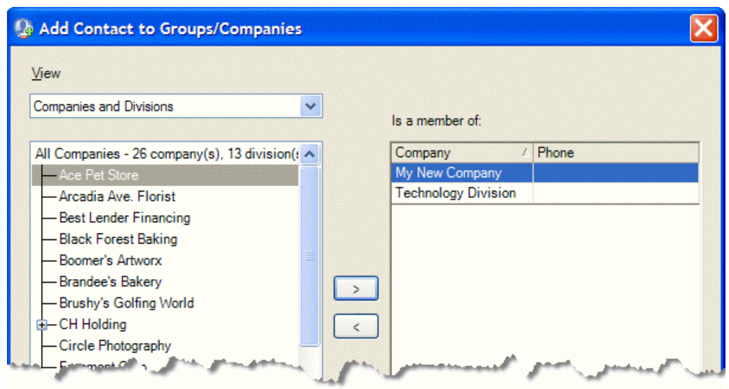


Figure 3-7 Add Contact to Groups/Companies dialog box

Figure 3-8 Company options on the Contact Detail view

Exercise 3.4: Create A Company Record From A Contact Record

Earlier you created a company record from scratch. Creating a company record from a contact record that has the address information for the company will keep you from having to type it in again. You can create a company record from a contact record by following the steps below.

1. Select the contact that has the information for the company record that you want to create. In this exercise select the contact Jane Bellamy of Boomers Artworx.

2. Companies ⇒ Create Company from Contact. The Company Detail view will open and the company name and address fields will automatically be filled in.

Exercise 3.5: Create A Contact Record From A Company Record

Creating a contact record from a company record that has the address information will keep you from having to type it in. You can create a contact record from a company record by following the steps below.

1. Select the company on the Companies tree that has the information for the contact record that you want to create. In this exercise select the company Circle Photography.

2. Companies ⇒ Create Contact from Company. The Contact Detail view will open and the company name and address fields will automatically be filled in. Type `Test Record` in the Contact field and move to another record.

Refreshing Linked Data In Contact Records

It is possible that you may not be viewing the most current data. This happens when there are several people using the database. To make sure that you are viewing the most current data, refresh the data of the contact record that is displayed in the Contact Detail view. Contacts ⇒ Update Linked Contact.

Linking Company And Contact Records

If you scroll through the contact records you will see that some company names are blue and underlined and others are not. The company names that are blue and underlined are linked. You can click on this link and open the company or division record.

Fields on the contact record that are linked will automatically be updated when the corresponding field in the company record is updated. This means that if the company name field on the company record changes from DEF Company to HIJ Company, any contact records that are linked to that company record on the company name field will automatically be updated if the **AUTOMATICALLY LINK NEW CONTACTS TO THEIR COMPANY RECORD** option as shown in Figure 3-9, is checked.

Tools ⇒ Preferences ⇒ Startup tab ⇒ Company Preferences button, will open the Company Preferences dialog box shown in Figure 3-9. The button at the end of the Company field on a contact record that is not already linked, opens the dialog box shown in Figure 3-10. If the contacts company name already exists in the database, you can link the contact to the company by selecting the company name on the dialog box.

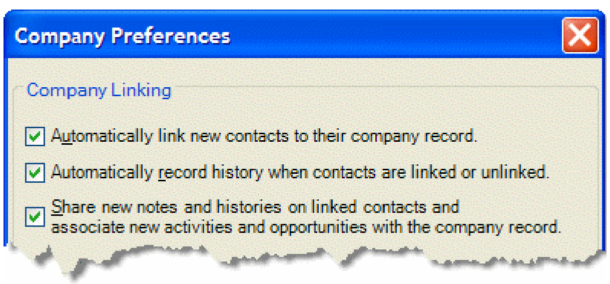


Figure 3-9 Company Preferences dialog box

Figure 3-10 Link To Company dialog box

Associate vs Linking

On the surface these terms sound like they perform the same function. Understanding the difference is only important if you have the need to make some contacts private. In ACT!, associating and linking have different functionality as discussed below. I'm not sure if how the "Private" option works is how it was intended to work, but I find it somewhat deceiving.

In "My world", when you mark a contact as private, whether or not the contact is "linked" to a company, any information that you enter on any of the tabs is also marked as private by default. The exception would be if you manually override the private option for a specific piece of information. If a history record is created when information about the contact is added, changed or deleted, the history record should also be automatically marked as private. Well, I started this paragraph off by saying in "My world".

The scenario that I just described is **NOT** how the private option works in ACT! if the contact record is "linked" to a company record. When a note or history record is created for a contact that is linked to a company record, they are visible from the company record by default. If this is not what you want to happen, mark the note as private on the Insert Note dialog box.

Linking Issues

Overall, linking contacts to companies is a good feature to have and use. Depending on how sensitive some of the contact data is, you may not want it to be shared. Some contact data is automatically shared. I think that it is important that you understand how linking works.

By default, contact notes, history, activity and opportunity records are displayed under the company record(s) that they are linked to. I thought that if the association (link) between a contact and company was removed that the contacts history, activity and opportunity records would also be removed from the company record, but that is not the case. I can understand why they are not automatically removed because the primary purpose of company records is to build a profile of the company, which includes the interactions with all of the contacts associated with the company. I just wanted to let you know that the contact linked data is not automatically removed from the company record when the records are unlinked.

Solutions
There are ways to prevent notes and history records from being displayed under the company record.
① As you already learned, when you create a note you can mark it as **PRIVATE**.
② If you know that you do not want any contact note and history records to be displayed under company records, clear the **SHARE NEW NOTES AND HISTORIES ON LINKED CONTACTS. . .** option shown earlier in Figure 3-9. With this option cleared (not checked) you can share a specific note if you have the need to do so.

Depending on a users rights, they may not be able to see all of the contact information that is displayed under the company record. Users that have rights to the contact record will be able to view the activity and opportunity records that are displayed under the company record.

Contacts can be associated to multiple companies and divisions but can only be linked to one company.

Exercise 3.6: Creating Manual Links Between Contacts And Companies

In this exercise you will learn several ways to link contact and company records.

Manually Link A New Contact With A Company

In this part of the exercise you will create the contact record and then link it to a company.

1. Open a new contact record and enter the name `Jane Doe`.

2. Click the button next to the Company field, then select the company, My Company and click OK. You will see that the company name is a link.

3. Click the Save button. If you click on the company link, you will see the company record on the Company Detail view.

Manually Link An Existing Contact With A Company

In this part of the exercise you will learn how to link an existing contact to a company.

1. Right-click in the Contact field in the Contact Detail view and select **LOOKUP CONTACT**.

2. Type `Charles Smith` in the Contact field and press Enter.

3. Click the button next to the Company field, then select the company, My Company and click OK.

> You can link a contact to a division the same way that you linked a contact to a company in both parts of this exercise. Instead of selecting the company, select the division.

Exercise 3.7: Lookup And Link Multiple Contact Records To A Company Record

This type of linking is another example of the static link that you learned about earlier.

1. Create a lookup that retrieves records that have **LOOKUP** in the Company field.

2. Select (highlight) both records in the Contact List view, then Companies ⇒ Link to Company.

3. Select the company, My Other Company and click OK. Click Yes when prompted to replace the company link. Click OK when prompted that no more records match the search criteria.

This message is letting you know that the company name will be replaced, which is what you want. This is one way that you can change the company that several contacts are linked to at the same time.

If you look at the My Other Company record on the Company Detail view, you will see that both contacts (Laura Smith and Tom Wood) have the new company name. Their old company name was "Lookup".

Exercise 3.8: Understanding The Power Of Linking

In the previous exercise you linked two contact records to a company record. Figure 3-11 shows the company and contacts associated with it. Notice that the Company field for John Doe is blank. This is how you can visually tell which contacts are linked to a company and which ones are not. In this exercise you will rename the company and observe the changes.

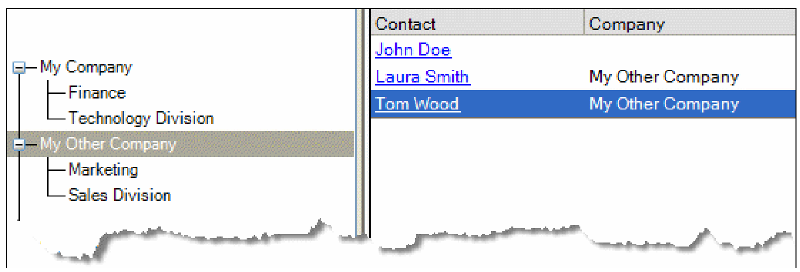


Figure 3-11 Contacts associated with a company

1. Open the My Other Company record in the Company Detail view.

2. Change the Company name to `My New Company`.

3. View ⇒ Refresh. This will update the company name throughout the database.

Linking And Unlinking Contact And Company Fields

You have learned that you could link the company name field on the contact record to the company name field in the company record. This is also true for other fields on the contact record.

> If you created a linked company record field it is applied to all company records, not just a particular record. The same is true if you unlink a company record field.

Viewing Linked Fields

If you want to know how company fields are linked to contact fields,
Companies ⇒ View Linked Fields.
You will see the dialog box shown in Figure 3-12.

The **DEFINE FIELDS** button will let you create, edit or delete fields. You will learn more about this option in the next exercise.

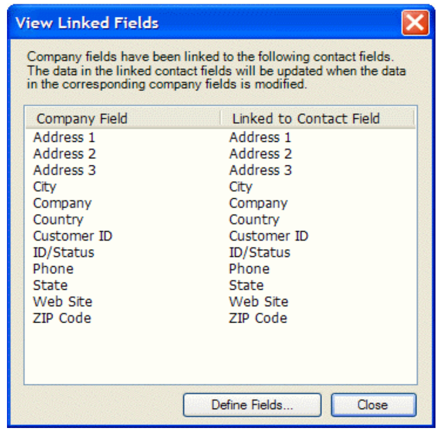


Figure 3-12 View Linked Fields dialog box

Exercise 3.9: Create A Linked Billing Address Field

In this exercise you will change the Billing Address 1 field in the company record so that it is linked to the User 5 field. This is not a link that you would create in a live database because it really does not make a lot of sense. The fields that are normally linked between contact and company records are already linked in this database, as shown above in Figure 3-12. Therefore I had to select fields that were not linked. You will have to create linked fields in a database that you create from scratch.

1. Tools ⇒ Define Fields. Open the **VIEW FIELDS FOR** drop-down list and select Companies.

2. Click on the Billing Address 1 field. Click the **EDIT FIELD** link as illustrated in Figure 3-13, then click Next.

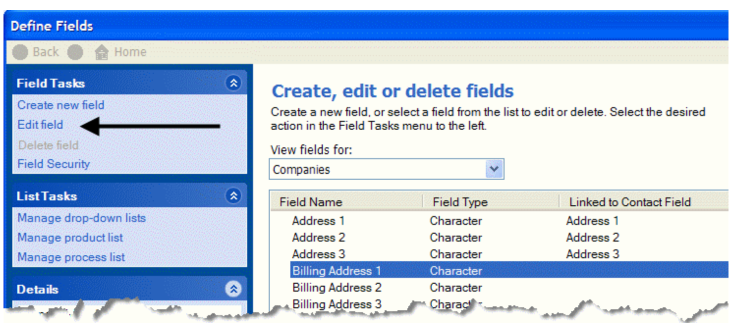


Figure 3-13 Edit Field link illustrated

3. On the Customize field behavior screen check the **LINK TO CONTACT FIELD** option, then open the drop-down list. Notice that some fields are dimmed out. You cannot select the dimmed out fields to link to because they have already been linked to a field.

4. Select the User 5 field, then click Finish. In Figure 3-14, you will see that the Billing Address 1 field is linked to the User 5 contact field. Click Close.

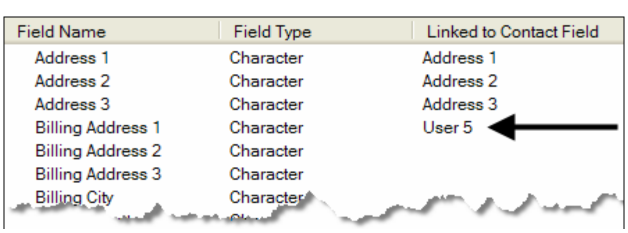


Figure 3-14 Billing Address 1 field linked to the User 5 contact field

Updating Contact Address Fields From The Linked Company Record

If a company moves you would update the address fields on the company record. The next step is to update the contact records that are linked to the company record so that they display the updated address information. Before changing the company record, it is a good idea to view the linked contacts to make sure that they have the address that you are about to change. Companies can have several locations which means that there will be different addresses for the same company. You can create divisions under the company or create a different company for each location. The steps below will show you how to change the address on the company record and update the contact records. For now you can read the steps.

1. Open the company record and change the address information, then save the changes.

2. Click the **UPDATES THE LINKED CONTACTS FOR THE CURRENT COMPANY** button on the toolbar, then click **YES** when you see the message shown in Figure 3-15.

Figure 3-15 Update linked contacts message

Test The Linked Field That You Created

To test the linked field, you will enter data in the Billing Address 1 field and observe how the linked contact records are updated.

1. Select the company My New Company, then click on the Addresses tab.

2. Type `Test field link` in the first billing address field.

3. Click the Save button, then click the **UPDATES THE LINKED CONTACTS FOR THE CURRENT COMPANY** button on the toolbar. Click Yes when you see the message shown above in Figure 3-15.

4. On the Contacts tab, click on one of the records that has the company name, My New Company. On the User Fields tab of the contact record, you should see the text that you entered in the company Billing Address 1 field in the User 5 field as shown in Figure 3-16.

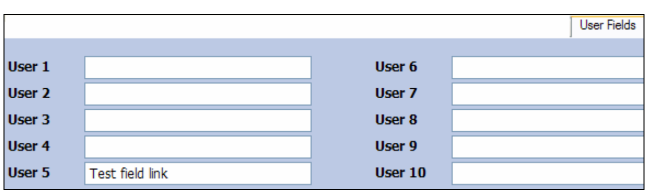


Figure 3-16 User fields

User Fields Tab

In the exercise that you just completed, you added data to a user field. If this was a live database you would rename the user field and update the layout. If you do not do this, other people that use the database will not know what type of data should be in the field. You will learn how to modify layouts in Lesson 10.

Unlink A Company Record Field

If you have a field that is linked, but no longer need it to be linked, follow the steps below. You do not have to complete these steps now.

1. Tools ⇒ Define Fields.

2. Select the field that you want to unlink, then click the **EDIT FIELD** link.

3. Click Next, then clear the **LINK TO CONTACT FIELD** option shown in Figure 3-17.

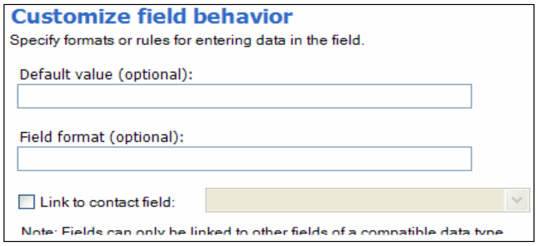


Figure 3-17 Customize field behavior options

4. Click Finish, then click Close.

Previously linked fields that have data will keep the data even though the field is no longer linked. Based on the example above, this statement would refer to the contact records. Keep in mind that contact records can link to company records, which would update the company record when a contact record is changed.

Adding Contacts To Divisions

There are several ways to add contacts as discussed below. It would be easier if we could use a drop and drag feature to add or move a contact record from one company or division to another one.

① Right-click on the division in the Companies tree and select **COMPANY MEMBERSHIP ⇒ ADD REMOVE CONTACTS**. You will see the Add/Remove Contacts dialog box shown earlier in Figure 3-6.
② Right-click on the contact on the Company Detail view and select **COMPANY MEMBERSHIP ⇒ ADD REMOVE CONTACTS**. You will see the dialog box shown earlier in Figure 3-6.
③ Right-click on the contact on the Company Detail view and select **COMPANY MEMBERSHIP ⇒ ADD SELECTED TO COMPANY**. You will see the dialog box shown earlier in Figure 3-7.

Exercise 3.10: Using The Companies Tree To Move A Division

You can drag divisions from one company to another. You can also drag a company to another company and make it a division.

1. Expand the two companies that you created earlier in this lesson by clicking on the plus sign in front of them.

2. Drag the Finance division from the first company to the second company. The Companies tree should look like the one shown in Figure 3-18.

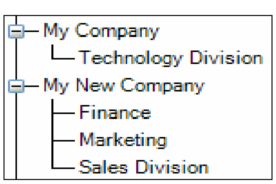


Figure 3-18 Division moved from one company to another

3. Use the Companies tree to add the contacts in Table 3-4 to the appropriate division.

Contact	Move From	Move To
Tom Wood	My New Company	Marketing
Laura Smith	My New Company	Sales Division
Jane Doe	My Company	Finance
Charles Smith	My Company	Sales Division

Table 3-4 Contacts to move

Exercise 3.11: Duplicating Company And Division Records

You can duplicate a company that has divisions, but the divisions are not duplicated. This is known as **DUPLICATING** a company. The process is similar to duplicating contacts that you learned to do in Lesson 2.

1. In the Company Detail view, right-click on the company, My New Company and select Duplicate.

2. On the dialog box shown in Figure 3-19 select the option, **DUPLICATE DATA FROM ALL FIELDS** and click OK.

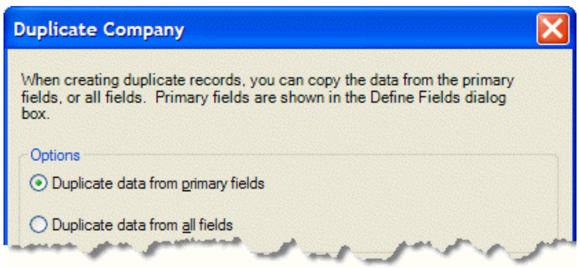


Figure 3-19 Duplicate Company dialog box

3. You will see a company record that does not have a company name.
   Type `My Duplicate Company` in the Company field.

4. View ⇒ Refresh. Click on the new company in the tree.

Notice that there are no divisions and that the contact John Doe is a member. That is because this contact is not linked to the company, My New Company. If you click on the company record, My New Company, you will see the two other contacts shown earlier in Figure 3-11. They are linked to the company.

Looking Up Companies

Looking up companies is similar to looking up contacts. Lookup ⇒ Companies, will display the Lookup Companies dialog box, which is similar to the dialog box that you used in Lesson 2 to look up contacts. The differences are discussed below.

① The Title bar on the dialog box has "Lookup Companies" instead of "Lookup Contacts".
② The fields in the Look in this field drop-down list are company related fields.
③ Replace Lookup is the only lookup option.

Exercise 3.12: Finding Companies

It is really important to make sure that the company data is as accurate as possible. Often, when adding a new company or contact, you may not know all of the information that is important to you. From time to time it is a good idea to either lookup records that do not have data in certain fields or create reports that show records that are missing data. If your company does a variety of promotional campaigns, it may be important to track how each contact was obtained. You could use the Referred By field to store this information.

In this exercise you will find companies where the Referred By field is empty.

1. Lookup ⇒ Companies ⇒ Other Fields.

2. Open the Look in this field drop-down list and select Referred By, then select the **EMPTY FIELD** option. Click OK.

The companies and divisions that you see in the Company List do not have the Referred By field filled in. Someone should try to fill in this information.

Using The Company List View

This view has the same shortcut menu as the Companies tree as shown earlier in Figure 3-2.

Create A New Division

To create a new division from the Company List View, right-click on the company that you want to create the division for and select **NEW DIVISION**.

Create A Company Note

Creating a note for a company is the same process and uses the same Insert Note dialog box that is used for creating notes for contacts. Right-click on the company that you want to create a note for and select **INSERT COMPANY NOTE.** The company name will automatically be filled in the Group/Company field on the Insert Note dialog box.

Moving Companies And Divisions

Earlier in this lesson you learned that you can drag companies and divisions to new locations. If you do not like to drag them, you can use the **MOVE** option on the shortcut menu shown earlier in Figure 3-3. The steps below explain the process.

1. Right-click on the company or division that you want to move and select **MOVE.**

   On the dialog box shown in Figure 3-20, select the **PROMOTE DIVISION TO COMPANY** option to make the division that you selected a company.

   Select the **CHANGE TO BE DIVISION OF** option if you want the company or division that you selected to be a division of another company.

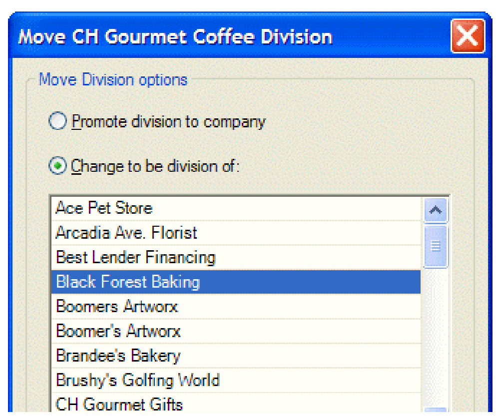


Figure 3-20 Move Division dialog box

2. Select one of the options discussed above.

3. If you selected the "Change to be division of" option, click on the company or division that you want to move it to, then click OK.

> **Deleting A Company Record**
>
> If you need to delete a company, any divisions under it will be promoted to a company unless you delete the division(s) first. You will not receive a warning that the company that you are deleting has divisions.

Groups Overview

Grouping records is another way for you to be able to categorize and find contacts. You have learned how to use the lookup command to find contacts. The limitation to using the lookup command is that all of the records have to have the same information in the same field. You could think of the group feature as a free form way to classify or categorize records, because they do not have to have any data in common. You can create as many groups as you need.

If you wanted to group certain contacts together because they are all involved in the same project, you could create a group. Contacts can be in more than one group. Grouping contacts helps you find and organize them quickly. The main benefit to creating groups over creating lookups, is that the group information is saved.

The top right of the Group Detail view displays the group name and description of the group that is highlighted. The bottom right section displays different information depending on which tab is selected. For example, the Group Info tab shows information about when the group was created, whether or not the group is private and who created it. The names on the Contacts tab are the people that are in the group. Figure 3-21 shows the Group toolbar for both group views. Table 3-5 explains the buttons on the toolbar.

Figure 3-21 Group toolbar

Button	Description
1	Opens the Group Detail view.
2	Opens the Group List view.
3	Saves the record. (3)
4	Opens the Print dialog box.
5	Opens a new group record.
6	Opens a new subgroup record.
7	Add or remove a contact.
8	Add a note for the group or contact record.
9	Schedule a telephone call.
10	Schedule a meeting.
11	Schedule a To-Do.
12	Creates an opportunity for the group. (3)
13	Attach a file to a group record.
14	Displays the members of the group in the Contact List view.
15	Compose and send an email.
16	Export the group list to Excel. (4)
17	Opens the Help system.

Table 3-5 Group toolbar buttons explained

(3) This option is only available from the Group Detail view.
(4) This option is only available from the Group List view.

Good Groups And Not So Good Groups

These are the types of groups that you can create. An example of a not so good group would be a group that contained contacts in the same state. This is not a good use of a group because you can create a lookup by state to accomplish this.

An example of a good group would be a group that contained contacts that attended an insurance seminar that you were a guest speaker at. This is a good group because there is no existing field that you could create a lookup on to find these contacts.

The Groups Tree

The Groups tree is on the left of the Group Detail view. At the top of the Groups tree, the number of groups and subgroups in the database are displayed as shown in Figure 3-22.

A plus sign in front of a group means that there is at least one group or subgroup below it. The Employees group shown in Figure 3-22 has two subgroups, International Employees and USA Employees. The International Employees group has two subgroups, AsiaPac Employees and European Employees.

If you click on a group in the tree, you will see the subgroups in the list on the right, as shown in Figure 3-22.

The **UP** button illustrated in Figure 3-22 is active if the group or subgroup that is selected is part of a larger group. Clicking this button will move up the hierarchy, one level at a time. This button is also on the Company Detail view. If you double-click on any subgroup shown, the detail record for the subgroup will be displayed.

Figure 3-22 Groups and Subgroups illustrated

View Groups/Companies Button

This button is available on the Contacts, Groups and Company Detail views. It will open the dialog box shown in Figure 3-23. It provides a quick way to view the groups and companies that are in the database. Select the option in the **VIEW** drop-down list for the type of view (group or company) that you want to see. The matching records will be displayed at the bottom of the dialog box.

If you click OK, the contacts displayed are from the view that you selected.

Figure 3-23 View Groups/Companies dialog box

Group List View

This view provides an easy way to view groups and subgroups as shown in Figure 3-24. The icon in the first column indicates that the group has subgroups. If you do not want to see the subgroups, clear the **INCLUDE SUBGROUPS** option.

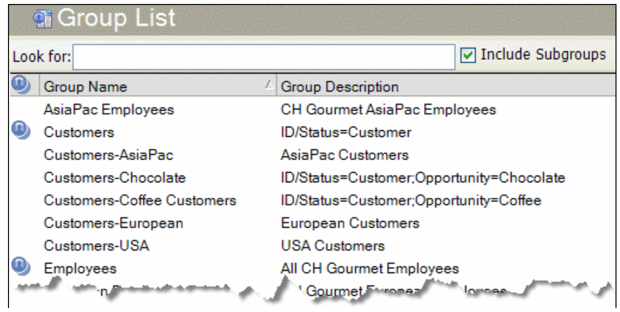


Figure 3-24 Group List view

Exercise 3.13: How To Create A Group

1. Click the **GROUPS** button in the Navigation bar.
2. Click the **NEW GROUP** button on the toolbar. You should see a new group record at the top on the right.

You can also right-click on a blank space in the Groups tree and select **NEW GROUP**.

3. Type `Potential Customer` in the Group field.
4. Press the Tab key and type `This group contains contacts that are interested in the next version of the workbook` in the Description field.

The Description field can have up to 128 characters.

5. Your group should look like the one shown in Figure 3-25. Click Save. Notice that the **HIERARCHY** field was filled in and that the group appears on the left side of the window.

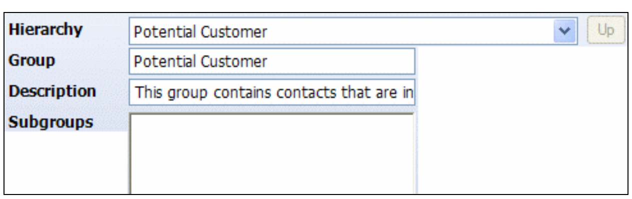


Figure 3-25 New group

Adding Contacts To A Group

There are several ways that you can add contacts to a group, as discussed below:

① You can scroll through the entire list of contacts in the Contact List view and select the contacts that you want, one by one and add them to a group. This is known as a **STATIC** group. The contacts stay in the group until you remove them.
② If possible, you can use the lookup command to find the records that you want to add to a group.
③ Select an existing group and add contacts from the existing group to the new group.
④ Contacts can automatically be added to a group if they meet the criteria of the query. This is known as a **DYNAMIC** group because contacts are added and removed based on whether or not they meet the criteria. There is no intervention on your part after creating the query. An example is a group for contacts that have the title Sales Rep. Contacts added to the database that have this title would automatically be added to the group. Any contact in the group whose title changes from Sales Rep would automatically be removed from the group. You will learn how to create this type of group in Lesson 8.

The benefit of using the last three options discussed above to add contacts to a group is that you do not have to scroll through all of the records in the database. You can add a contact to as many groups as needed.

> When you add a contact that has a note to a group, the contacts notes are displayed on the Groups Note tab, unless the note is marked private. You will see the private note in the group, but other users will not.

Exercise 3.14: How To Add Contacts One By One To A Group

The contacts that you add to the group in this exercise are static.

1. Select the group that you want to add contacts to. In this exercise select the Potential Customer group.

2. Click the **ADD/REMOVE CONTACTS TO GROUP** button on the toolbar or the **ADD/REMOVE CONTACTS** button in the tab section of the window. You will see the Add/Remove Contacts dialog box shown earlier in Figure 3-6. Click the Contacts button.

3. Click on the contact Ashley Allan, then press and hold down the **CTRL** key and click on the following names: Bruce Baker, Sarah Baker and Kirby York.

4. Click the **ADD** button. The four contacts that you selected should be visible in the **SELECTED CONTACTS** list as shown in Figure 3-26.

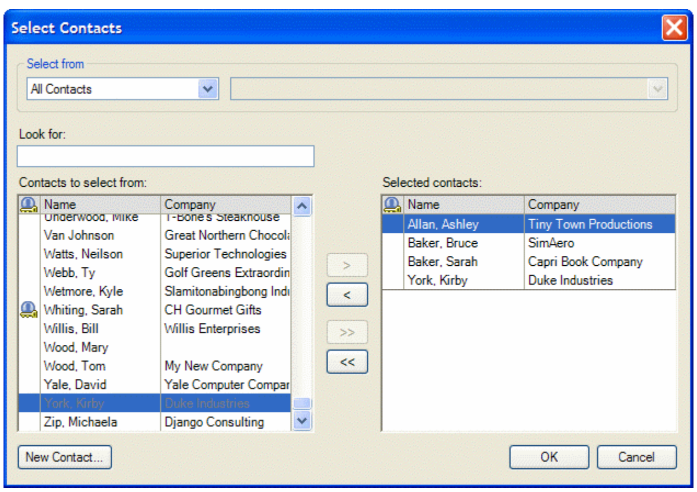


Figure 3-26 Contacts added to the group

The options in the **SELECT FROM** drop-down list and the drop-down list to the right, let you narrow or widen the number of names that appear in the Contacts to select from list. If you select the **GROUPS** option from the drop-down list and the Hot Opportunities group, you will see the contacts shown on the left of Figure 3-27.

If the database has a lot of names and you do not want to scroll through the list, you can type the name that you want to add to the group in the **LOOK FOR** field.

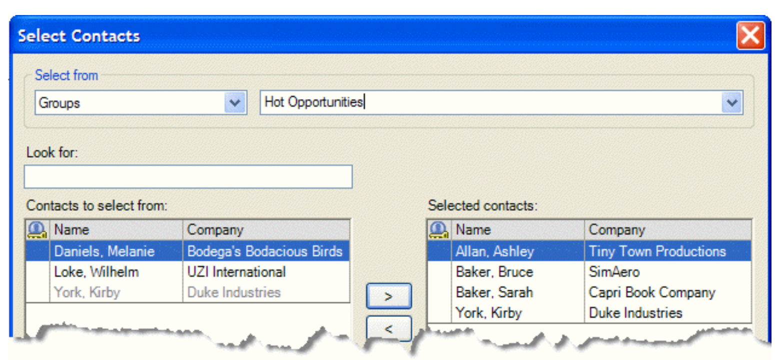
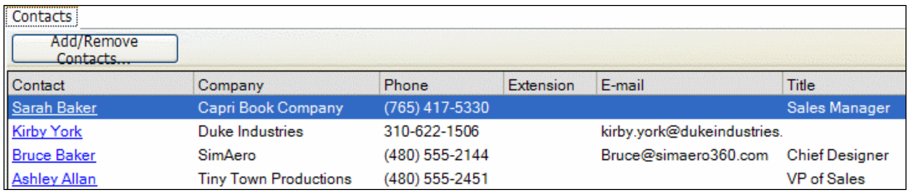


Figure 3-27 Contacts from an existing group

If you scroll through the list of names on the left, you will see that the names that you added to the group are grayed out. This lets you know that the contact is already a member of the current group or has been selected to be a member of the current group.

5. Click OK. You should see the contacts in the **STATIC MEMBERS** section of the Add/Remove Contacts dialog box. Click OK. The contacts will now be added to the Potential Customer group that you created. You will see the contacts at the bottom of the Contacts tab, as shown in Figure 3-28.



Contact	Company	Phone	Extension	E-mail	Title
Sarah Baker	Capri Book Company	(765) 417-5330			Sales Manager
Kirby York	Duke Industries	310-622-1506		kirby.york@dukeindustries.	
Bruce Baker	SimAero	(480) 555-2144		Bruce@simaero360.com	Chief Designer
Ashley Allan	Tiny Town Productions	(480) 555-2451			VP of Sales

Figure 3-28 Contacts added to the group

To add a contact to a group, you can right-click on a contact record on either contact view and select **ADD CONTACT TO GROUP.**

Looking Up Groups

Looking up groups is similar to looking up companies. Lookup ⇒ Groups ⇒ Select an option, will display the same dialog box that you used in Lesson 2 to look up contacts. The differences are the same as the differences for companies.

Exercise 3.15: Finding Group Records

Earlier in this lesson you learned how to find (look up) all of the contacts that were associated with a company. Looking up contacts that are in the same group is basically the same process. In this exercise you will create a look up for groups that are missing data in the primary address field.

1. Lookup ⇒ Groups ⇒ Other Fields.

2. Open the Look in this field drop-down list and select the Address 1 field, then select the **EMPTY FIELD** option, as shown in Figure 3-29. Click OK.

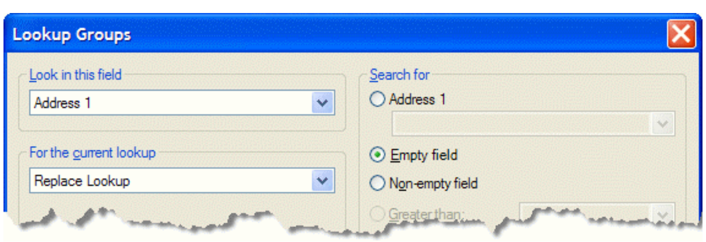


Figure 3-29 Lookup Groups dialog box

You will see the groups that do not have any information in the Address 1 field. If you double-click on any group in the Group List view and then click on the Address tab, you will see that the Address 1 field is empty.

Exercise 3.16: How To Rename A Group

The steps below will show you how to rename a group.

1. Click on the group that you want to rename in the Groups tree, as shown earlier in Figure 3-22. In this exercise click on the Potential Customer group.

2. Type in the new group name. Type the word `Book` after the word **POTENTIAL** in the Group field, then click the Save button. The group will be renamed.

> The reason that I click the Save button is because it refreshes the view. If you clicked on another group in the tree and then come back to the group you changed, you would see that the group was renamed.

Exercise 3.17: Add Contacts To An Existing Group

In this exercise you will find contacts in Arizona and add them to the Potential Book Customer group.

Create The Lookup And Add The Contacts To The Group

1. Create a lookup to find all contacts in Arizona. There should be 15 records in the Contact List view.

2. Select (highlight) the 15 records, then right-click on the highlighted records and select **ADD CONTACTS TO GROUP** as shown in Figure 3-30.

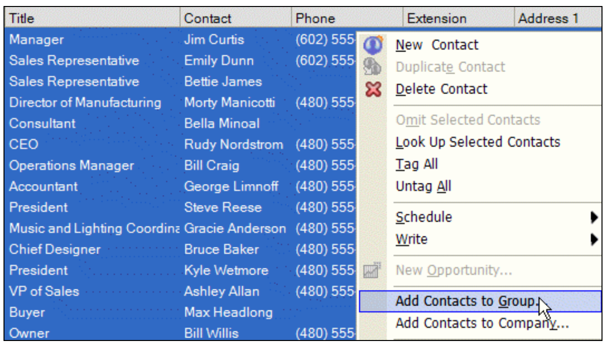


Figure 3-30 Option to add the contacts to a group illustrated

> If you do not want to right-click on the records, use Groups ⇒ Group Membership ⇒ Add Selected to group.

3. Click on the Potential Book Customer group as shown in Figure 3-31, then click OK.

Figure 3-31 Group selected to add contacts to

View The Contacts In The Group

1. Click the Groups button on the Navigation bar, then click on the Potential Book Customer group in the Groups tree.

2. Click on the Contacts tab. You should see the 15 contacts that you just added, plus the contacts that you added in a prior exercise. Click the Save button.

Exercise 3.18: Use The Lookup Command To Add Contacts To A Group

You can use this option when you have several records that have something in common that you want to add to the same group. In this exercise you will create a lookup to find all contacts that have the Sales Representative title. After that, you will create a group and add the contacts to a group.

Create The Lookup And The Group

1. Create a lookup that finds all contacts that have Sales Representative as the title.

2. Groups ⇒ New Group.

3. Type `Sales Reps` in the Group field, then type `This group contains all of the sales reps.` in the Description field.

4. Click the Add/Remove Contacts button, then click the Contacts button.

5. Select the **CURRENT LOOKUP** option from the drop-down list. You should only see the contacts from the lookup that you created, in the list of names on the left side of the dialog box, as shown in Figure 3-32.

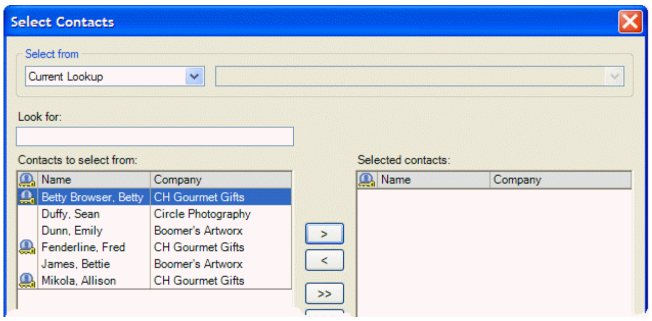


Figure 3-32 Contacts from current look up

6. Click the **ADD ALL>>** button. All of the contacts should be in the list on the right side of the dialog box. Click OK twice to close both dialog boxes.

7. In the Group Detail view click on the Sales Reps group in the Groups tree. On the Contacts tab you will see the contacts that are in the group.

How To View The Groups A Contact Is A Member Of

1. Click on the link for Emily Dunn.

2. On the Groups/Companies tab in the Contact Detail view, you will see that this contact is a member of the Sales Rep group that you just created and the Potential Book Customer group that you created earlier in this lesson.

Exercise 3.19: How To Manage Group Notes And Attachments

The Notes tab on the Group Detail view allows you to enter notes for the group, just like you can enter notes for a contact. If you create a note for the group, you only have to type it in once and it will be associated with all contacts in the group. You can also assign a contacts note to a group. There are several ways to create a note for a group.

How To Create A Group Note And Attach A File To The Group Note

In addition to adding a note to a group, you can attach files like charts, spreadsheets or sales literature to a group. Doing this allows you to keep all of the attachments for the group in one place.

1. Click the Groups button, then click on the Potential Book Customer group.

2. On the Notes tab, click the **INSERT NOTE** button. You should see the Potential Book Customer group name in the Group/Company field on the Insert Note dialog box.

3. Type `These contacts have requested a book catalog.` in the **REGARDING** field.

4. Select the text that you just typed and change the font to Comic Sans MS, then change the font size to 12. Change the color to red. The color option is to the right of the Font Size drop-down list. Leave the dialog box open to complete the next part of the exercise.

How To Attach A File To A Group

In Lesson 2 you attached a file to a contact record. Attaching a file to a group record is the same process.

1. Click the **ATTACH** button on the Insert Note dialog box.

2. Double-click on the L2 Attach file. The note should look like the one shown in Figure 3-33. Click OK.

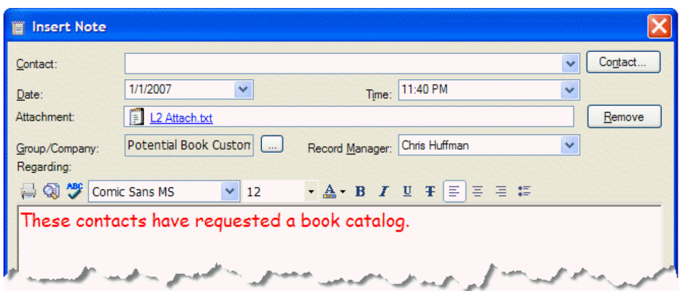


Figure 3-33 Group note

View The Group Notes And Attachments

1. On the Notes tab, open the **SHOW FOR** drop-down list and select Group. The entry should be the same one shown above in Figure 3-33.

2. Click on the Attachment icon for the note. The attached file will open. Close the attached file.

Exercise 3.20: Assign A Contact Note To A Group And Individual Contacts

In this exercise you will complete the following tasks:

① Create two notes for a contact that is in a group.
② Associate one of the notes to contacts in the group that the contact in the task above is a member of and to one contact that is not in the group.
③ Associate the second note to a group that the contact in the first task is not a member of.

Add The Contact To Another Group

1. On the Contacts tab, right-click on the contact Sarah Baker in the Potential Book Customer group and select Group Membership ⇒ Add Selected to Group.

2. Select the Prospects - Hot Opportunities group, then click the Add button. The contact should be a member of two groups, as shown on the right of Figure 3-34. Click OK.

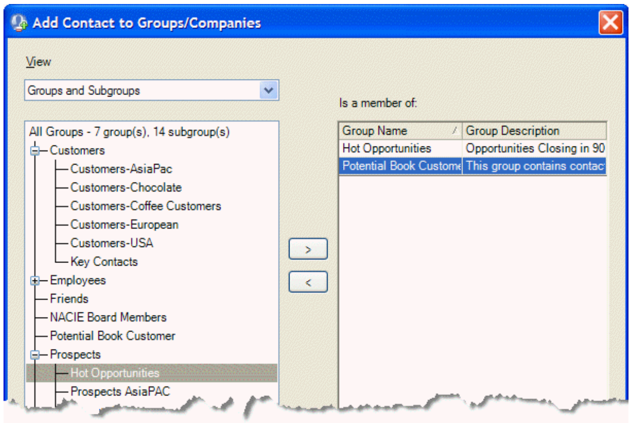


Figure 3-34 Add Contact to Groups/Companies dialog box

Create The Notes

In this part of the exercise you will create the notes for Sarah Baker.

1. Open the Contact Detail view for the contact Sarah Baker. (**Hint:** If you are in the Group Detail view, click on the contacts name on the Contacts tab).

2. Click on the Notes tab in the Contact Detail view and create the notes in Table 3-6.

Note	Regarding Field	Formatting
1	`This is the first contact note for S. Baker. It will be applied to individual contacts in 2 groups and 1 contact that is not in a group.`	Change the font size to 10 and the text color to green and bold.
2	`This is the second contact note for S. Baker. It will be applied to the group via the Insert Note dialog box.`	Change the color of the text to purple, bold and italic. (5)

Table 3-6 Notes to create for Sarah Baker

(5) Click the button at the end of the Group/Company field on the Insert Note dialog box. Click OK to share the note as shown in Figure 3-35. Select the Potential Book Customer group to add to the note. You should have the options shown in Figure 3-36.

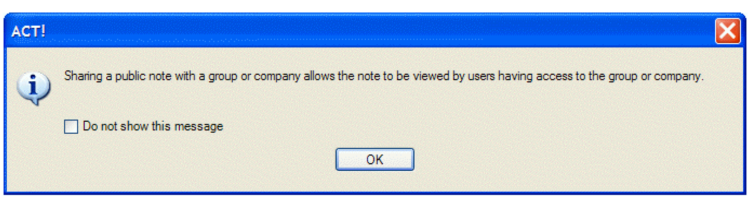


Figure 3-35 Sharing a public note message

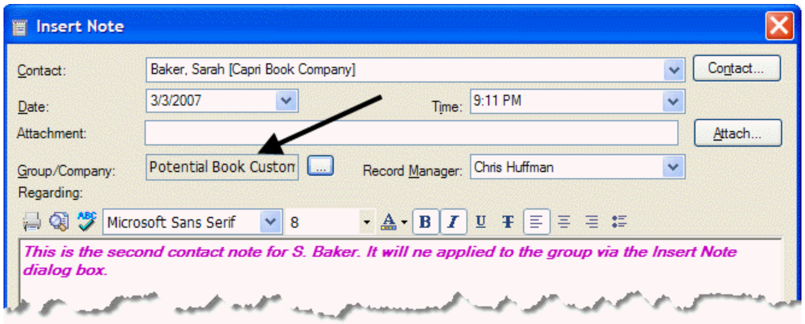


Figure 3-36 Note associated to a group

Associate The Notes

1. Locate the first note that you created in Table 3-6 for Sarah Baker in either the Contact or Group Detail view, then double-click on the note.

2. Click the **CONTACT** button on the Edit Note dialog box and select the contact George Bailey.

3. Open the **SELECT FROM** drop-down list and select Groups, then select the Sales Reps group from the next drop-down list. You will see the contacts for the group at the bottom of the dialog box. Add Bettie James to the contact list.

4. Select the Prospects group. Add the contacts Mary Bailey and Kirby York. You should have the contacts selected that are shown in Figure 3-37.

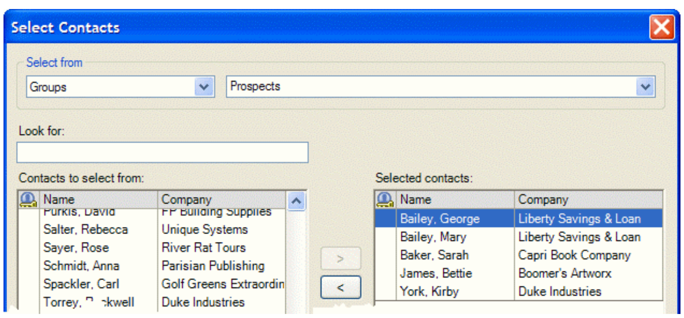


Figure 3-37 Group contacts

5. Click OK twice to close both dialog boxes. When you see the dialog box shown in Figure 3-38 select the first option and click OK.

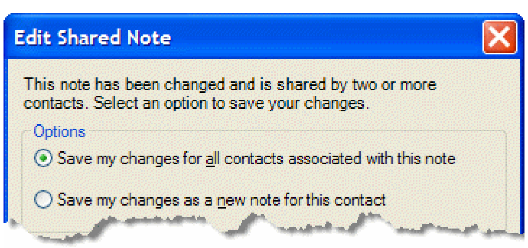


Figure 3-38 Edit shared note options

> **Editing A Shared Note**
>
> After creating a note, you may need to update the information in the note. When you modify a note that is shared with groups or contacts, you will see the dialog box shown above in Figure 3-38. Select the option for how you want the changes to the note to be applied.

View The Notes

1. Create a lookup by last name. Search for Bailey. You will see three contacts. Mary and George Bailey will have the first note in Table 3-6 above (in green). Peter Bailey does not. This is correct.

2. The note should also be available in the Prospects group. If you do not see the note select **GROUP CONTACTS** in the Show for drop-down list.

3. View the Potential Book Customer group notes. You will see the second note that you created in Table 3-6 above. You will also see the first note because it was created by Chris Huffman (aka you) who is a member of the Potential Customer group.

Show For Drop-Down List Options

The options in the **SHOW FOR** drop-down list shown in Figure 3-39 are available on the notes, history, activities and opportunities tabs in the Group Detail view. The options let you filter the entries that will be displayed.

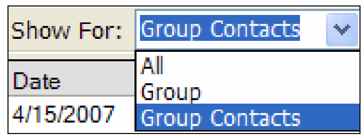


Figure 3-39 Show For drop-down list options

ALL will display both group and group contact entries.
GROUP will display entries that are created at the group level.
GROUP CONTACTS will display entries that are associated with a contact in the group. They are created at the contact level like the one that you created earlier in Exercise 3.20.
The difference between Group and Group Contacts entries are the level that they are created at.

> Group level notes cannot be viewed on the Notes tab in the Contact Detail view. To know if there is a group note for the contact, click on the Groups/Companies tab on the Contact Detail view, then double-click on the group and click on the Notes tab in the Group Detail view.

If the note is long, you will not see all of it on the Notes tab. If you look to the far right of the window, you should see a shaded area. This is the Preview area.

If you click on a note, you will see the note on the right side of the window. You can resize the Preview area by placing the mouse pointer in the position illustrated in Figure 3-40 and drag the mouse pointer in the direction that you want to resize the window to.

If you do not want to have the Preview area visible, you can hide it by clicking on the Options button and clearing the **SHOW PREVIEW** option. You can do this on any Notes tab.

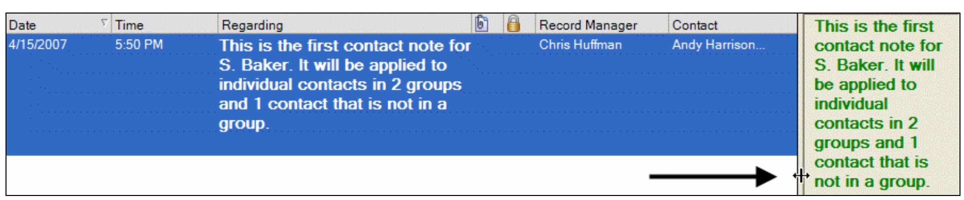


Figure 3-40 Preview area illustrated

Exercise 3.21: How To Save The Result Of A Lookup As A Group Or Company

If you create a lookup that you will use over and over, you can save it as a Group or Company by following the steps below. The number of records in this type of group or company can change. If the value in the field that the lookup is using changes and now meets the criteria, the contact record will automatically be added to the group or company. If the value in a contact record changes and no longer meets the lookup criteria, it will automatically be removed from the group or company.

1. Create an Email Address lookup for contacts that do not have an email address.

2. Lookup ⇒ Groups ⇒ Save Lookup as Group.

3. Type `My Group Lookup No Email` as the group name, then View ⇒ Refresh.

4. Lookup ⇒ Companies ⇒ Save Lookup as Company.

5. Type `My Company Lookup No Email` as the company name, then View ⇒ Refresh. If you view the records under the company and group that you just created, you will see that both have the same records.

Subgroups

A subgroup is usually a subset of the contacts in the group. In the previous exercise you created a group that contains contacts that do not have an email address. If you wanted to further categorize the contacts by company, title, state, status or just about anything that you can think of, you can create a subgroup. Subgroups can be 15 levels deep, meaning subgroups can have subgroups. Subgroups are similar to divisions that companies have.

Exercise 3.22: Creating Subgroups

In this exercise you will create two subgroups for the My Group Lookup No Email group; one for sales reps and one for title.

1. In the Group Detail view, right-click on the My Group Lookup No Email group and select **NEW SUBGROUP**.

2. Type `Sales Reps No Email` in the Group field, then type `This subgroup contains sales reps that do not have an email address` in the Description field.

3. Click on the My Group Lookup No Email group in the Groups tree. You should see the subgroup.

4. Create another subgroup under the My Group Lookup No Email group. Use `No Title` as the name. Type `These contacts do not have a title` in the Description field.

Exercise 3.23: Moving (Copying) Contact Records Between Groups And Subgroups

After subgroups are created, it is a good idea to move the appropriate records from the group to a subgroup. In this exercise you will move contacts that have the Sales Rep title to the corresponding subgroup and contacts that do not have a title to a different subgroup. There are two ways to move contact records as discussed below.

① Move the contacts manually.
② Use a query. You will learn how to do this in Lesson 8.

Keep in mind that the contact records are not physically removed from the group and placed in the subgroup. The contact records are copied. This means that contact records at the group level can also be in a subgroup. There are three ways to avoid this if you think it will drive you crazy to see the same contacts in the group and subgroup. This is one of the items on my ACT! wish list that I would like to see improved. I think it would be easier if we could move contacts between groups and subgroups.

① Do not create any subgroups. Only create groups.
② Use the Add/Remove Contacts dialog box to remove the contacts from the group.
③ Do not add records to a group that you really only want to see in a subgroup.

Moving Records Manually

1. Click on the My Group Lookup No Email group, then click on the Contacts tab.

2. Sort the contacts by the Title field. The contacts that do not have a title should be at the top of the list.

3. Click in the row of the first contact without a title. Press and hold down the Shift key, then click in the row of the last contact record that does not have a title.

4. Right-click on the highlighted records and select Group Membership ⇒ Add Selected to Group.

5. Select the **NO TITLE** subgroup that you created in the previous exercise, then click OK.

6. Select all of the contacts that have the Sales Representative title in the My Group Lookup No Email group and add them to Sales Reps No Email subgroup.

7. If you click on the Sales Reps No Email subgroup you will see the contacts that you added as shown in Figure 3-41.

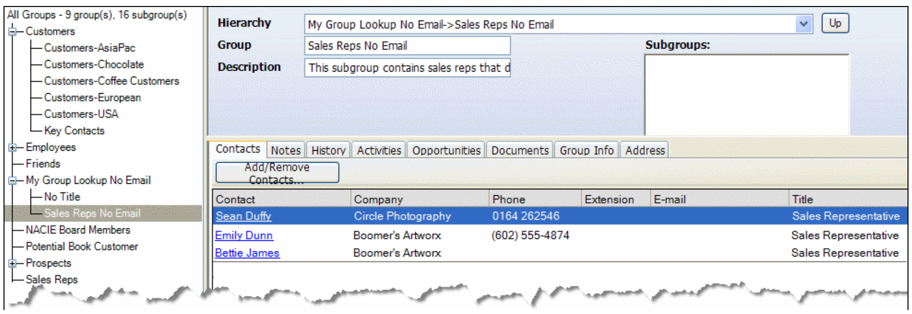


Figure 3-41 Contacts in a subgroup

Deleting Groups Or Subgroups

You may have a need to delete a group or a subgroup. When you delete a group or subgroup, the contacts, their notes and attachments are not deleted. The groups notes, history records and attachments are deleted. Subgroups of the group that will be deleted are not deleted. If you need to delete a group or subgroup, you can follow the steps below. For now, you can read this section because you do not need to delete any group or subgroup.

How To Delete A Group

1. Right-click on the group in the Group Detail or Group List view and select Delete.

2. Click Yes when prompted to delete the current group.

How To Delete A Subgroup

1. Right-click on the subgroup in the Group Detail or Group List view and select Delete.

2. Click Yes when prompted to permanently delete the current subgroup.

Removing Contacts From Companies Or Groups

There may be times when you need to remove contacts from a company, division, group or subgroup. An example would be if the contact leaves the company. If this is the case, you can follow the steps below to remove contacts that are not linked to a company, division or group record.

1. Right-click on the company, division or group that has contacts that you want to remove in the tree and select Company Membership ⇒ Add/Remove Contacts or Group Membership ⇒ Add/Remove Contacts.

2. Click the Contacts button on the Add/Remove Contacts dialog box.

3. Select the names that you want to remove in the **SELECTED CONTACTS** list, then click the Remove button.

4. Once you have removed the contact records, click OK twice to close both dialog boxes.

Removing Links Between Contact And Company Records

If a contact is linked on the Company (name) field, it cannot be changed until you remove the link. Earlier in this lesson you learned that contact notes and history records that appear under the company record are not automatically removed. Removing the link between the contact and company is how the contact records remain under the company record.

1. Open the contact record (in the Contact Detail view) that you want to remove to company link from.

2. Click the button at the end of the Company field. You will see the message shown in Figure 3-42. Click OK. The link will be removed and the Company name will no longer be linked.

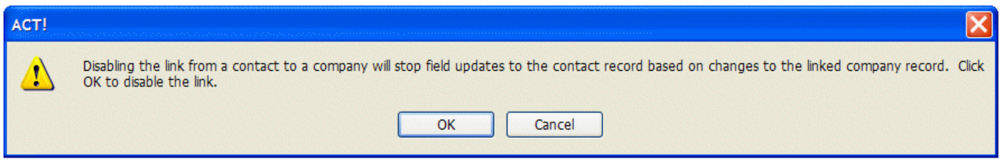


Figure 3-42 Disable link message

Converting A Group To A Company

Groups and subgroups can be converted to a company. If the group or subgroup that you convert has subgroups, the subgroups are not converted. They move up the hierarchy and quite possibly become a group. Contacts that are in the group or subgroup become members of the company.

One reason that you may convert a group to a company is because the contacts in the group have the need to use some of the features that a company record has. In this exercise you will convert the My Group Lookup No Email group to a company.

Once you convert a group to a company, it cannot be converted back.

Exercise 3.24: Using The Convert Groups To Companies Wizard

1. In the Group Detail view, right-click on the My Group Lookup No Email group and select Convert to Company.

Groups ⇒ Convert To Company, will also open the wizard shown in Figure 3-43.

2. Click Next on the first screen of the wizard. You will see the screen shown in Figure 3-43. Click Next.

The **SELECT GROUPS** screen shown in Figure 3-43 lets you select the group(s) that will be converted to a company. Because you selected the group before opening the wizard, the group is already selected and in the **SELECTED GROUPS** list, ready to be converted to a company.

If the group has subgroups that you also want to convert, check the **INCLUDE SUBGROUPS** option.

The **MAP FIELDS** screen shown in Figure 3-44 lets you select the field in the company record that data from a field in the group record will be moved to.

If you need to select a different company field, click in the company field that needs to be changed and select the field that you need from the drop-down list as shown in Figure 3-44.

If you modified the group view and added fields to it, you will not see a corresponding field in the list of company fields. You will have to modify the company view also. You will learn how to modify layouts in Lesson 10.

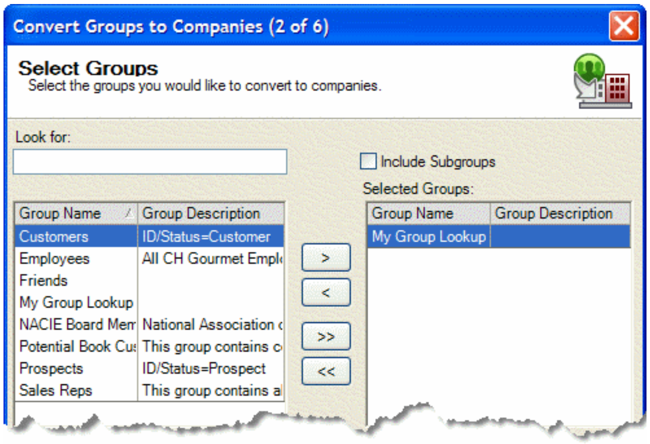


Figure 3-43 Select Groups screen

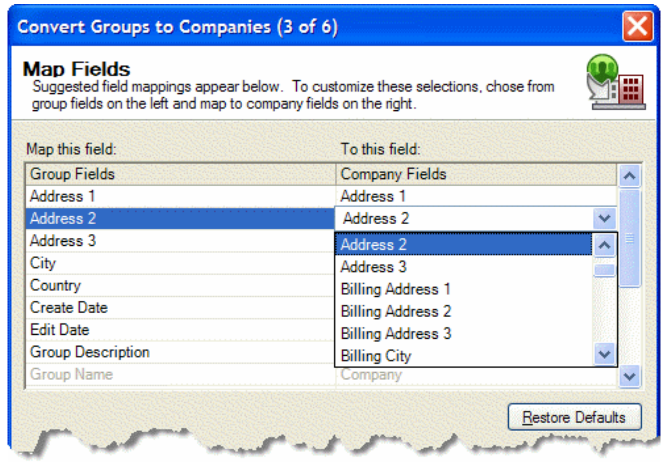


Figure 3-44 Map Fields screen

3. The fields are mapped correctly. Click Next on the Map Fields screen.

   The screen shown in Figure 3-45 displays the group(s) that will be converted.

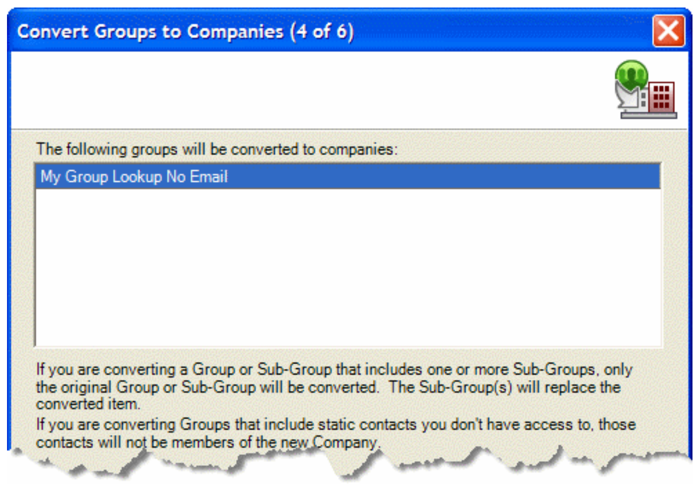


Figure 3-45 Groups to be converted screen

4. Click Next on the screen shown above in Figure 3-45. The Convert Groups to Companies screen lets you know when the group has been converted.

5. Click Next after the group has been converted. Click Finish on the last screen of the wizard.

The group record has been removed. If you look in the Company Detail view you will see the My Company Lookup No Email company. If you need to change the company name you can.