



Get Into the Act

by Patti and William Feldman

Keeping track of appointments, activities, phone calls, and other records can sometimes be overwhelming. *ACT!*, a feature-rich contact management program, can't bring down your blood pressure but it can help you master the daily challenges of running a small construction business. It's a perfect match for a builder's office, particularly one that either lacks a full-time secretary or harbors an overworked one.

Whether you use the DOS version or the newer Windows program, *ACT!* (an acronym for *automatic contact tracking*) has many useful features, including a calendar, quick data look-ups and retrieval, contact-specific notes, automatic phone dialing and faxing, report generators, and a full-function word processor.

Contact Manager

The main contact screen is where you enter all pertinent information — name, address, phone number — in up to 74 user fields. You can set up multiple databases for various categories of contacts. For example, you can create a database for each of your estimates, label it with a job name, and include basic information about the client, architect, subs, and vendors. As the job progresses through the bidding stage, all the bid quotes, notes, and comments entered into the program provide an accurate historical log. If the estimate turns into a project, everything you need is already in place. If you use the same subcontractor for different projects and list him separately in each job database, your notes will be sorted by project so you can quickly look them up or print them out.

Setting up appointments and keeping track of when you need to make a call is *ACT!*'s forte. The program has a complete set of built-in scheduling features, including a single menu bar with pull-down options. You can flag critical phone calls, meetings, and other tasks with memory-resident beepers and pop-up reminders.

Letters and Reports

ACT!'s word processor stores letters in a general letter file and makes a note in the contact record of the day each letter was sent. This makes it very easy to use the program's excellent mail merge feature to send the same letter

(addressed to suit) to a list of contacts you select. You can create and customize an unlimited number of letters, memo forms, and fax sheets — even simple billing forms.

The look-up feature allows instant access to detailed records, notes, phone calls, and letters for any name in the database. You can also search for key words and quickly switch between databases.

ACT! lets you organize your data into as many as nine predefined report formats, such as contact notes, history summary, and activities completed, or you can create your own report format. Whether you want a report of all client-contractor contact for a six-month period (including phone calls, letters, faxes, and payments), or a report of all activity with everyone for the last seven days, you simply select the contacts and call up the appropriate report form. In seconds, you can view the data on screen, save it to disk, or send it to your printer.

ACT! supplies a sample database to work with, so you don't have to risk any of your own valuable data during the learning process. The manuals are well laid out and informative, and the technical support is excellent.

ACT for Windows

Instead of the "hot keys" used in the DOS version, *ACT! for Windows* lets you maneuver within the program with a mouse. It has an icon toolbar with 15 standard macro buttons (plus 5 more of your choosing) that execute frequently performed sequences of commands in one keystroke. You

can "drag and drop" the same block of data in several different places — for example, to schedule recurring activities on daily, weekly, and monthly calendars.

The Windows version word processor has the look and feel of a desktop publishing program, with the ability to select fonts and type size, change justification and rulers, and preview your documents on screen in "what-you-see-is-what-you-get" (WYSIWYG) format. You can even import graphics to create your own letterhead.

ACT! for Windows is not as fast as its DOS predecessor, and the screen is harder to read. But the Windows version offers the flexibility of sprucing up your documents by importing graphs, data, and graphics from other Windows programs. You might also prefer the Windows version if you have a built-in fax board, because it uses memory better.

Both versions of *ACT!* require a modem to use the auto-dial feature, which dials phone numbers for you and keeps a record of whether or not the calls were completed. You can also send a fax, but only if you have a fax board installed in your computer.

DOS Add On

If you prefer to stay in the DOS environment, a nifty piece of add-on software called *ACT!Pak!* provides an electronic bridge between two popular word processing programs — Microsoft Word and WordPerfect — and all of the standard capabilities of *ACT!*. It transfers the contact, company name, and address to either word processing program, where you can then write and save your document. When you return to *ACT!*, the contact history screens will note the name of the letter and calendar date it was created. ■

William Feldman, a former general contractor, and Patti Feldman write frequently about computers for the construction industry.

ACT! Minimum Requirements

ACT! (version 2.11, \$395) requires an IBM or compatible computer with at least an 80286 CPU, 640K of RAM, a hard disk, and DOS 3.1. It will run on any monitor, up to and including color VGA.

ACT! for Windows (version 1.01, \$495) requires Windows 3.0, 2MB of RAM, and 2MB of free hard disk space. It is compatible with display standards from EGA to SVGA. A mouse is optional. For more information, write to Contact Software International, 1840 Hutton Drive, Suite 200, Carrollton, TX 75006; 800/365-0606.

Act!PAK! (version 1.30, \$60) requires DOS 3.1 or higher, and either Microsoft Word (version 5.5) or WordPerfect (version 5.1). For more information, contact Oakhurst Systems, Inc., 8212 Labbe Lane, Suite 101, Vienna, VA 22182; 703/641-9232.

