RemoteDesk Add-On Interface for ACT!

Overview

This add-on for the ACT! contact management system allows you to get at your contacts information easily when you close the deal and enter that big sales order that you have been working on. You can turn a contact into a customer master record instantly. In a normal case, all relevant new customer information must be manually entered. The program reads your ACT! Database directly and passes relevant client information into RemoteDesk so that a new master customer record can be easily created. This new customer record along with the sales order is later passed to head office to the accounting system .

The program uses similar search and grouping definitions that have been set up in ACT! and are used to find your contacts. This RemoteDesk add-on eliminates entry mistakes and repetitive keying of information that already exists in your contact management system to provide a quick and smooth way to create new sales orders.

Installation and Setup

Compatibility

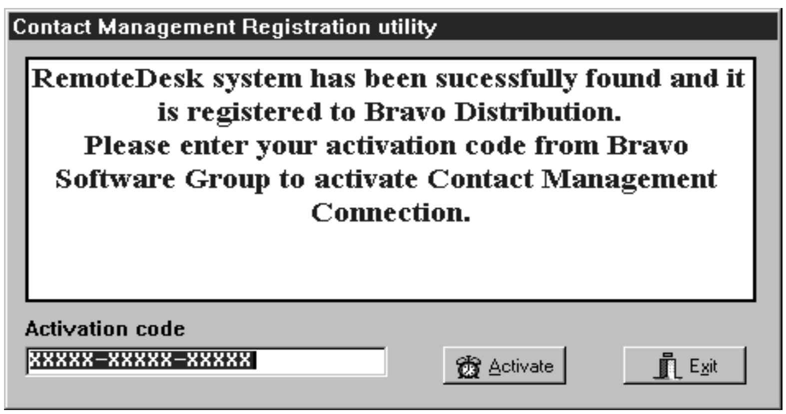
The RemoteDesk add-on for ACT works with the Windows version of ACT 3.0.3 or greater. It is this version that provides data access to external programs using OLE.

Installation

The Contact Management interface is automatically installed with RemoteDesk. By setting the RemoteDesk Company Profile for ACT, you can begin using your ACT data immediately. There is a **free 30 day trial period**. After that period you must get an activation number from Bravo Software Group to continue using the ACT interface. Please refer to the **About RemoteDesk** under the Help menu in RemoteDesk for contacting Bravo Software Group.

Activation

To make your ACT interface permanent, you require an activation code from BSG. Once you have received your Activation code, using the the Windows Start menu, run the program **"a:\activate.exe".** When the following screen appears, enter the code and click on the **"Activate"** button.

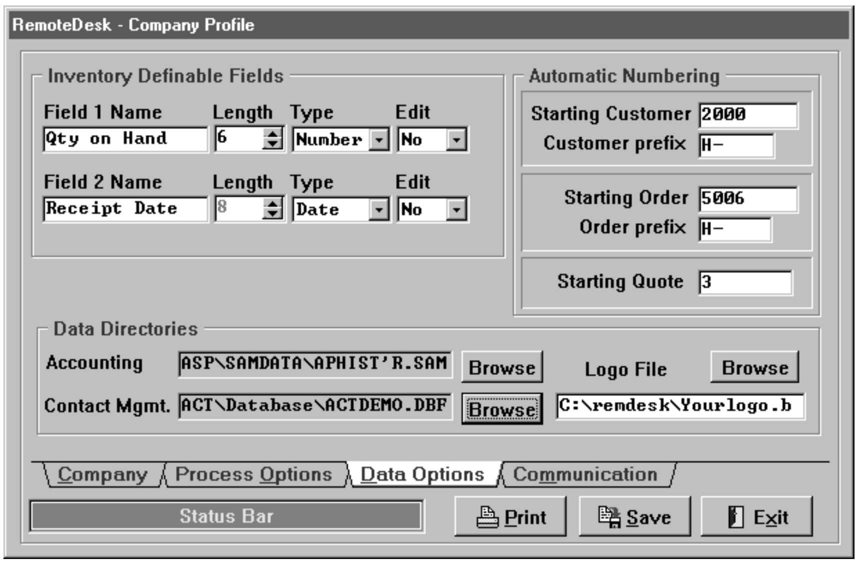


If there are multiple RemoteDesk client sites in your network, you can use the same program and activation code to set an ACT! interface for each one.

IMPORTANT - You must ensure the OLE component of ACT is registered in Windows 95. To register it, use the Windows **"RUN"** option, go to your ACT programs directory, usually **C:\ACT,** and select a program called **ACTREG.EXE**. The process is then instantly updated.

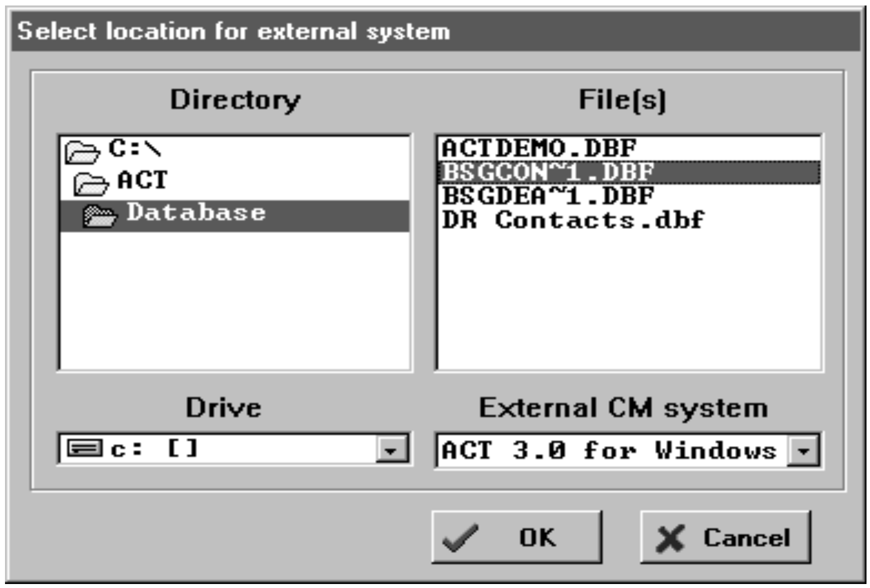
RemoteDesk Profile Setup for ACT

Before trying to use the interface, you must first tell RemoteDesk where to find you ACT database. Click on the **Profile** button and then select **Company Profile** from the drop down menu. From the Profile screen select the **"Data Options"** tab.



Under **Data Directories** you have to enter your Contact Management data path. When you click on the Browse button, the following screen appears.

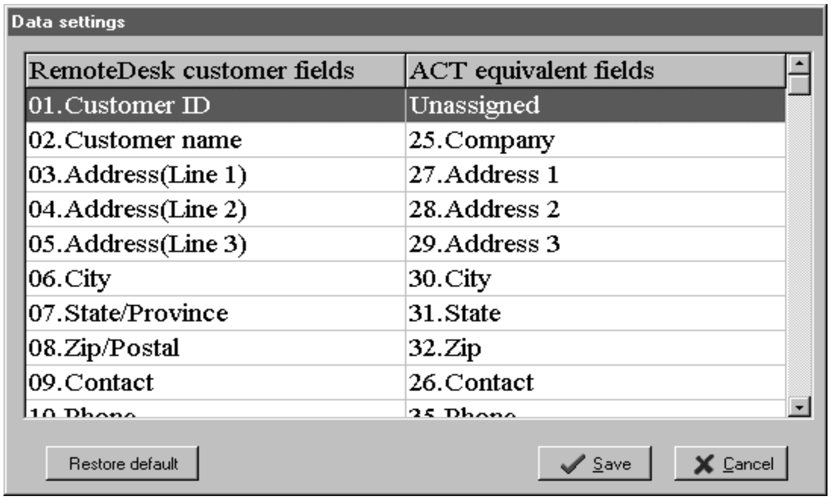
Ensure that ACT is selected for External CM System. Find the ACT data directory and select the appropriate ACT database.   Click on **OK** when this is entered.   The path is updated with your selection.
Click on the **“Save”** button on the Profile screen to save the changes.



You must re-start RemoteDesk to have the updated changes take effect.   RemoteDesk can now access your ACT data.

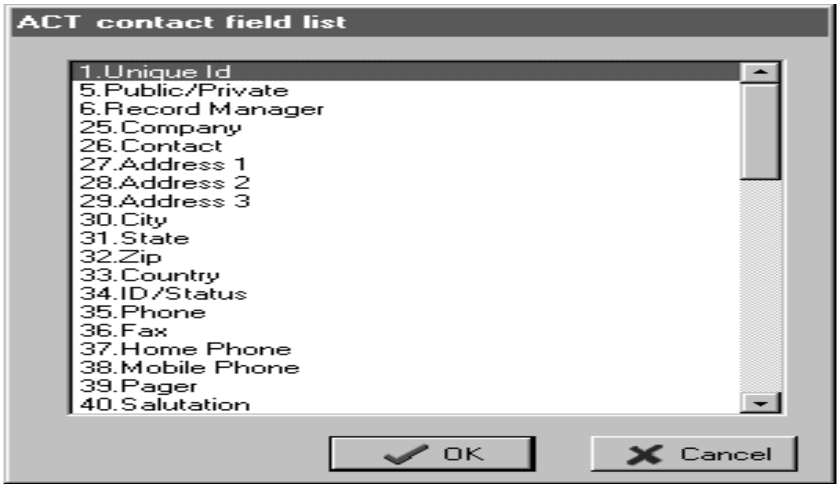
Choosing Data Fields From ACT

To provide maximum flexibility in relating your ACT contact data to RemoteDesk customers, there is a special screen that allows you to make changes. This data relationship has a default setting and will provide basic information exchange between ACT and RemoteDesk. To access user defined fields in ACT and any others, click on the **"Configure"** button on the bottom of the ACT interface screen.



The screen is split into two columns. The column on the left lists all of the RemoteDesk customer master fields that can be filled in. The column on the right, list the ACT contact record fields that relate to each of the RemoteDesk fields. By scrolling through the list, you can see which ACT field is passed into the RemoteDesk customer record.

Pressing the **<Enter>** key or clicking on a selected line will either "Unassign" the field if there was a previous entry or will bring up a window containing the list of ACT fields that can be accessed. "Unassigned" indicates that no ACT field is currently used here and that RemoteDesk defaults will be used to fill in the field.



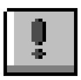
You can scroll through the complete list of ACT fields, including the user definable ones, to assign the right field that pertains to the customer data selected. Clicking on the OK button will update the data setting list with the selected ACT! fields.

Using RemoteDesk with ACT

The ACT add-on provides a direct link to your contact profiles stored in your ACT database. During the entry of a new sales order in RemoteDesk, you can add new customers from your ACT contacts instead of entering all customer name, address and phone details manually.

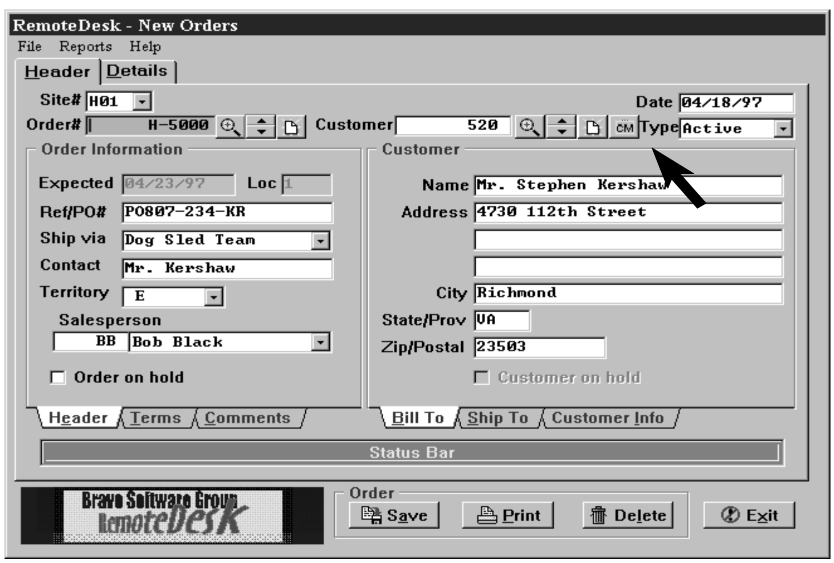
During sales order entry, new customer records can be created. Typically their information must be manually entered. Now on the order entry screen ACT data can be accessed.

When the contact management interface is installed into RemoteDesk, there is a new icon added to the regular sales order entry screen.



Note - if the Contact Management icon does not appear on the order screen, check the **Company Profile** setup on the “Data Options” tab for your contact management type and data path setting.

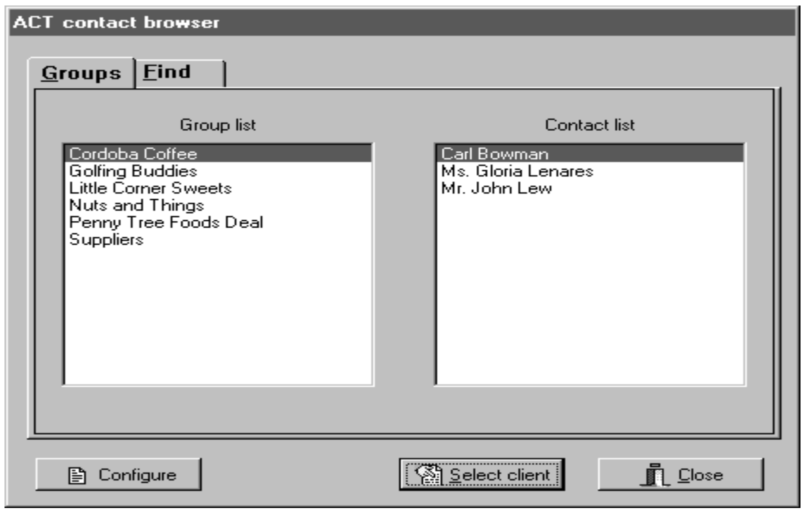
The sales order screen is displayed.



This is the RemoteDesk sales order entry screen. It is displayed when you click on the **Orders** button and select **"Enter New Orders"** from the drop down menu. The icon appears with the **Customer number** field and is marked with a "**CM**" for Contact Management.

Adding a new customer from ACT

To add a new customer from your ACT database click on "new customer" icon, and then click on the Contact Management icon "CM" next to the Customer number field. To update an existing customer record from ACT, display that customer on the screen and then click on the CM icon. The following screen is displayed.

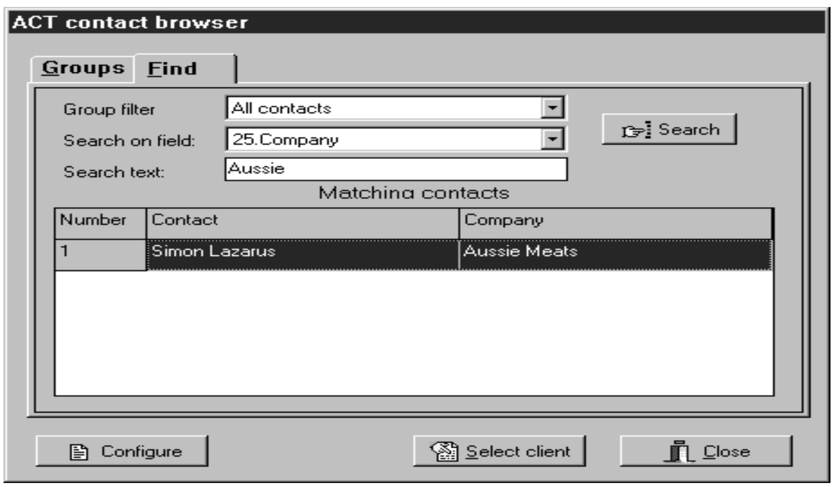


The program uses similar search and grouping definitions that have been set up in ACT and are used to find your contacts. You can click on each of the groups, if they have been defined in ACT, to search for a client record. Then scroll through the contact list to find the right one. Click on the **"Select client"** button to use it in RemoteDesk.

Searching for a Contact

You can also search for a contact by entering a text string for any number of fields. Click on the **Find** screen and select the group to search in and the database field to search for. For example if you only know the company name and want to get the right contact, select **"All contacts".** Then select field **"25. Company"** and enter in the partial company name starting with the correct letter. The program will then display all contacts for companies beginning with the entered text.

Use the contact name scroll window to select the right one. Click on the **"Select Client"** button to pass the highlighted client record to RemoteDesk.



Consideration for Special Fields

Most of the fields in RemoteDesk customer profile are string or text fields and have no special requirements. There are a few fields that do have specific constraints and they are described here. If a field is "unassigned" then the RemoteDesk Order Template is checked for a default for the specific field when the customer is added.

Tax status: The program can accept any existing tax scheme number from ‘0' to ‘9'. Only the first non-blank character of the selected field coming from ACT is checked. If it not the characters 0 to 9 then RemoteDesk uses the Order Template as a default.

Territory: Only the first two characters of the selected fields from ACT are used as the territory code. For example from an ACT field containing “WO - West Ontario” the territory field would be set to “WO”.

Terms: Only a valid RemoteDesk Terms code is acceptable. Anything else is not used and the Order Template is used as a default.

Sales person: Only a valid RemoteDesk Salesperson code is acceptable. Anything else is not used and the Order Template is used as a default.

Discount level: Only first non-blank character is considered. It can be either be a digit from '0' to '5' or letter from 'A' to 'E' . (case is not important). A letter 'O' or 'N' mean no discount.

Credit Limit: Any numeric values from ACT can set the credit limit. For example if the field contains “1000.00" then the credit limit is set to one thousand. If there are other characters in the field the Order Template default may be used.