

Company Wizard Plus

Usage:

Company Wizard Plus currently offers six functions.

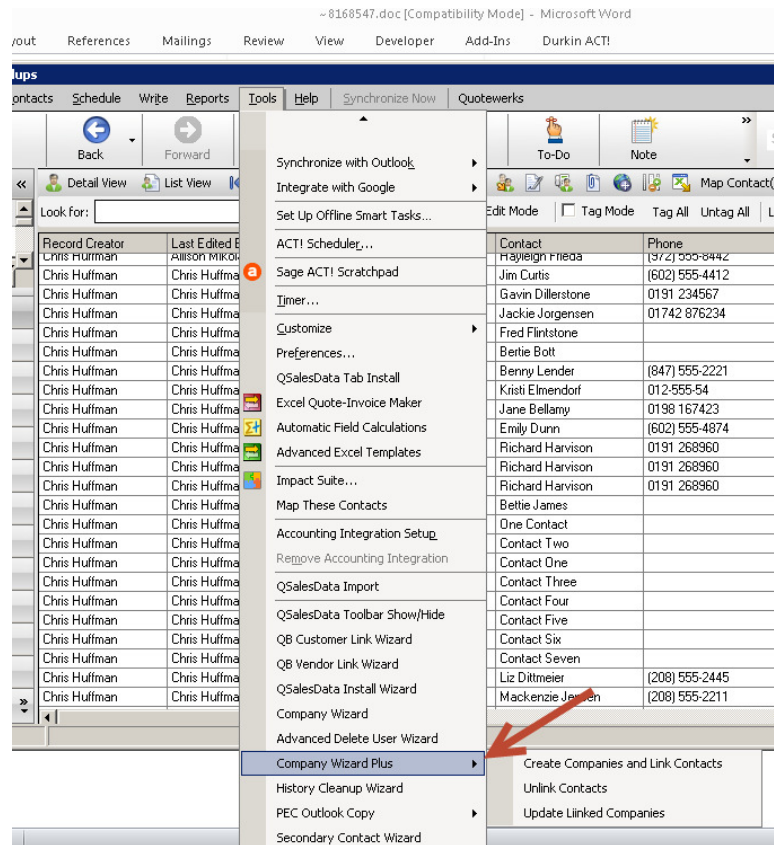
1. Create Company Records and Link Contact Records to the Company Records. For detail on this function, see below.
2. Unlink Contact Records from Company Records. For detail on this function, see below.
3. Update Linked Fields in Contact Records from Company Records. For detail on this function, see below.
4. Update Linked Fields in Company Records from Contact Records. For detail on this function, see below.
5. Flatten an individual Company Hierarchy. For detail on this function, see below.
6. Delete the selected (highlighted) Companies from the Company List. For detail on this function, see below.

Company Wizard Plus

Create Companies and Link Contacts Function

Usage:

1. Open ACT! and switch to the CONTACT LIST view.
2. Do a lookup and tag the contacts you want to process. If you want to process all contacts, use “Tag All” to tag all the contacts.
3. Click on Tools and then on Company Wizard Plus and select the Create Companies and Link Contacts menu item.
4. You will get a dialog box to confirm your action and to specify processing options.



The Image below shows the dialbox that opens when you choose Companies and link Contacts. Select the pairs of fields in the Contact and Company records that will be used to match Contact and Company records. The default is to match just on Company Name and these fields will be preselected in the dropdown boxes. To use different fields or additional fields select the field names in the dropdown boxes. Examples of user are below this image.

Company Wizard Plus for ACT!

The Company Wizard Plus function will create and link Company records for the tagged records in the current contact list. Is this what you want to do? If so specify your match fields below.

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Patricia Egen Consulting, LLC

Contact Fields

Company Fields

Options - and you want me to ...

☒ Link Contacts to Companies as you process them

☐ Don't Create Companies - just link if you can

☐ Process Contact records with Blank Fields

☐ Associate Contacts to Companies as you process them

Version 2.0.0.26

Help Yes, continue No, cancel

For example, if you work with the same company name at multiple locations, one possible set of match fields would be Company Name, City, and State. Another example, you may have imported into ACT! the account records (as Companies) from your accounting software, and also imported the contact names as contacts, and you brought the account numbers into both records. You could link companies and contacts on this account number field in both records.

Note: You must select the same number of fields from the Contact and the Company records for matching purposes. You will get an error message if you do not select the same number of fields for both record types.

You can now select from the following options for creating company records and linking contacts to them.

- To link contacts to company records select the first check box "Link Contacts to Companies as you process them".
- To link contacts to existing company records, select the first and the second check box "Don't Create Companies - just link if you can". This selection will not create new company records. Only contacts that match existing company records will be linked.
- If you want to associate contacts with companies but not link them, select the bottom check box "Associate Contacts to Companies as you process them". Associated

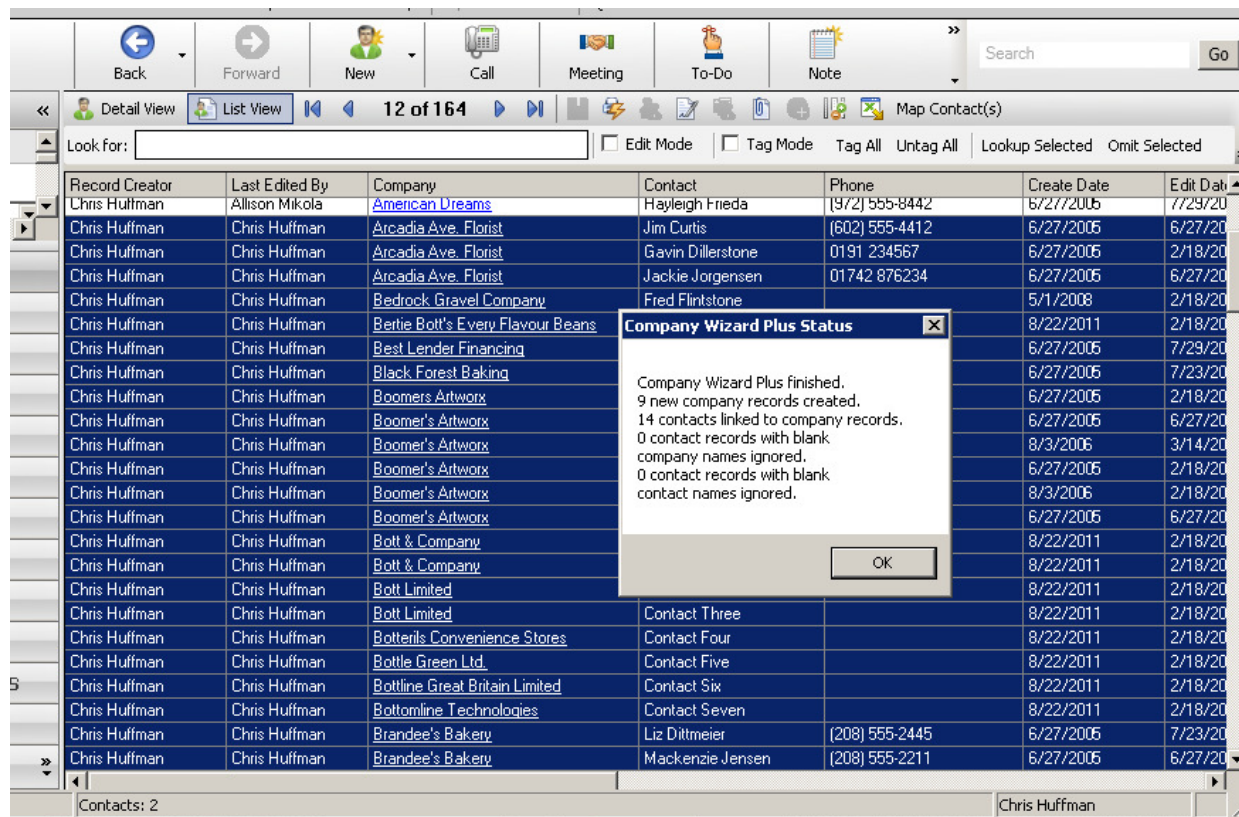
Contacts appear in the Contacts tab of the Company Detail View but the fields in the Contact record will not get updated by using the built-in Companies/Update Linked Contacts action or the Company Wizard Plus Update Linked Contacts function. If you want to build companies during this process then make sure that the "Don't Create Companies" box is unchecked. If you do not want to build companies during this process, make sure that the "Don't Create Companies" check box is checked.

- Normally, Contact records with blank match fields are considered incomplete records and they are bypassed. To force the processing of contact records with blank match fields, check the "Process Contact records with Blank Fields" check box. In this case the blank value is considered as on valid value in the field.

Note: Contact records with blank Company names are always bypassed. This is because, if a company records is attempted to be created from the contact record, the company record is required to have a non-blank Company name.

When you are ready to process the selected Contact records with the selected options, click **YES, CONTINUE**.

You will now see a progress box. If you change your mind during the process, click Cancel. However, company records that have been created and contact records that have been linked or associated will not be rolled back.



The screenshot shows a software window with a toolbar at the top containing icons for Back, Forward, New, Call, Meeting, To-Do, and Note. Below the toolbar is a status bar showing '12 of 164' records. A table of contact records is displayed with columns: Record Creator, Last Edited By, Company, Contact, Phone, Create Date, and Edit Date. A 'Company Wizard Plus Status' dialog box is open in the center, displaying the following text:

Company Wizard Plus finished.
 9 new company records created.
 14 contacts linked to company records.
 0 contact records with blank company names ignored.
 0 contact records with blank contact names ignored.

The dialog box has an 'OK' button at the bottom.

Record Creator	Last Edited By	Company	Contact	Phone	Create Date	Edit Date
Chris Huffman	Allison Mikola	American Dreams	Hayleigh Frieda	(972) 555-8442	6/27/2005	7/29/20
Chris Huffman	Chris Huffman	Arcadia Ave. Florist	Jim Curtis	(602) 555-4412	6/27/2005	6/27/20
Chris Huffman	Chris Huffman	Arcadia Ave. Florist	Gavin Dillerstone	0191 234567	6/27/2005	2/18/20
Chris Huffman	Chris Huffman	Arcadia Ave. Florist	Jackie Jorgensen	01742 876234	6/27/2005	6/27/20
Chris Huffman	Chris Huffman	Bedrock Gravel Company	Fred Flintstone		5/1/2008	2/18/20
Chris Huffman	Chris Huffman	Bertie Bott's Every Flavour Beans			8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Best Lender Financing			6/27/2005	7/29/20
Chris Huffman	Chris Huffman	Black Forest Baking			6/27/2005	7/23/20
Chris Huffman	Chris Huffman	Boomers Artworx			6/27/2005	2/18/20
Chris Huffman	Chris Huffman	Boomer's Artworx			6/27/2005	6/27/20
Chris Huffman	Chris Huffman	Boomer's Artworx			8/3/2006	3/14/20
Chris Huffman	Chris Huffman	Boomer's Artworx			6/27/2005	2/18/20
Chris Huffman	Chris Huffman	Boomer's Artworx			8/3/2006	2/18/20
Chris Huffman	Chris Huffman	Boomer's Artworx			6/27/2005	6/27/20
Chris Huffman	Chris Huffman	Bolt & Company			8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bolt & Company			8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bolt Limited			8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bolt Limited	Contact Three		8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Botterils Convenience Stores	Contact Four		8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bottle Green Ltd.	Contact Five		8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bottline Great Britain Limited	Contact Six		8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Bottomline Technologies	Contact Seven		8/22/2011	2/18/20
Chris Huffman	Chris Huffman	Brandee's Bakery	Liz Dittmeier	(208) 555-2445	6/27/2005	7/23/20
Chris Huffman	Chris Huffman	Brandee's Bakery	Mackenzie Jensen	(208) 555-2211	6/27/2005	6/27/20

A final box will show you the results of the operation.



Company records have been created and linked as requested.

Notes:

There is a known interaction with Company Wizard Plus and the Contact List Plus product from Durkin Computing, LLC.

If you are using Contact List Plus, Company Wizard cannot find the contacts that you have selected and therefore has nothing to process. This is an issue with the way that both products interact with ACT! itself and is not something that can be fixed by either add-on vendor.

To use Company Wizard in this environment, you must temporarily turn off Contact List Plus using its control dialog found under Tools/Contact List Plus or Tools/Durkin Impact Suite. This brings up the “About Contact List Plus” dialog box. Deselect the check box “Use Contact List Plus (Master Switch)”. This will revert ACT! to using the built-in Contact List function. Use the built-in Contact List to tag contacts and process them through Company Wizard Plus.

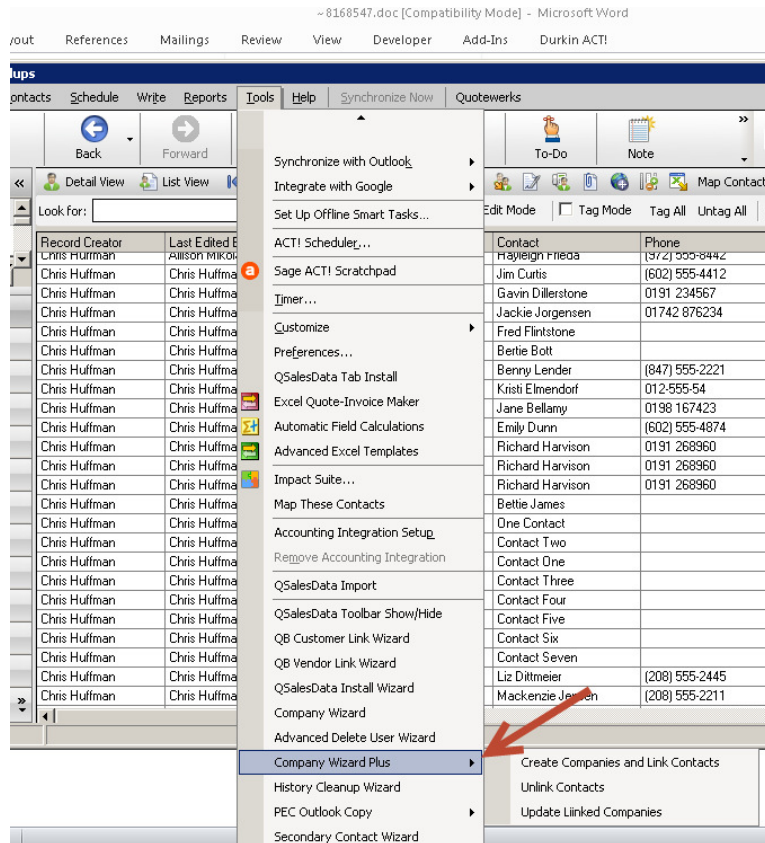
When you are done with Company Wizard, use the Tools/Contact List Plus dialog box to turn Contact List Plus back on (check the box next to “Use Contact List Plus (Master Switch)”).

Company Wizard Plus

Unlink Contacts Function

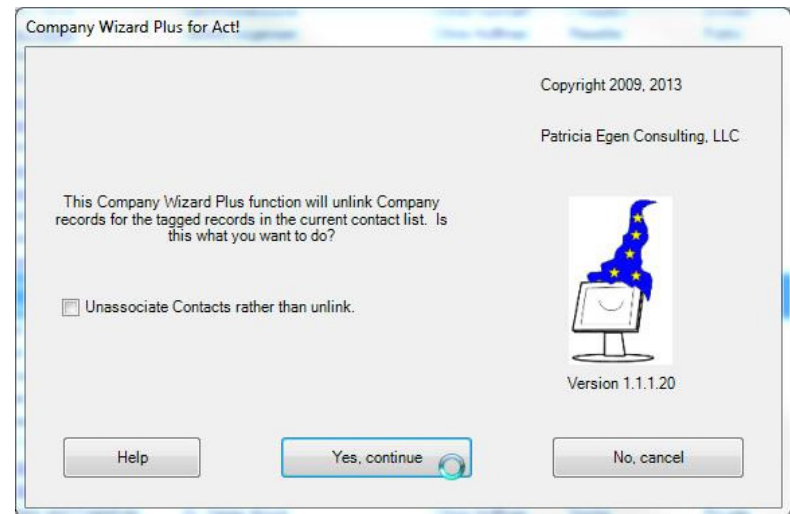
Usage:

1. Open ACT! and switch to the CONTACT LIST view.



2. Do a lookup and tag the contacts you want to process. If you want to process all contacts, use “Tag All” to tag all the contacts.
3. Click on Tools and then on Company Wizard Plus and select the Unlink Contacts menu item.

You will get a dialog box to confirm your action and offer the option to UnAssociate rather than UnLink the tagged contacts.



If you want to unassociated rather than unlink the contacts from their company records check the box.

When you are ready to process the selected Contact records with the selected options, click YES, CONTINUE.

You will now see a progress box. If you change your mind during the process, click Cancel. However, any unlinking or unassociating already performed will not be rolled back.

A final box will show you the results of the operation. Company records have been unlinked or unassociated as requested.



Sage ACT! Premium - DemoDBWithDupes

File Edit View Lookup Contacts Schedule Write Reports Tools Help Synchronize Now Connect with LinkedIn®

Sage ACT!

Back Forward New Call Meeting To-Do Note History

Search Go

Contacts

Detail View List View 24 of 163

Edit Mode Tag Mode Tag All Untag All Lookup Selected Omit Selected Options

Lookup

Contact Field: Contact

Contains: Go

More Options...

Related Tasks

- View All Contacts
- Export to Excel
- Import Contacts
- Print Current Screen

Company	Contact	Record Manager	Title	Address 1	City	State	ZIP Code
Bertie Bott's Every F	Bertie Bott	Chris Huffman	President	Buckingham Palace	London		SW1A 1AA
Best Lender Financi	Benny Lender	Chris Huffman	Sales Manager	4500 Payment Way	Currency	IL	60199
Black Forest Baking	Kristi Elmendorf	Chris Huffman	Manager	Grafenburger Allee 1	Mnchen		9865
Boomers Artworx	Jane Bellamy	Chris Huffman	Owner	Mile End Road	Whitley Bay	KS	NE65 8PL
Boomer's Artworx	Emily Dunn	Chris Huffman	Sales Representativ	8907 E. Rosebud L	Scottsdale	AZ	85258
Boomer's Artworx	Richard Harvison	Chris Huffman	Vice President	No Place	Newcastle upon Tyr		NE12 6YY
Boomer's Artworx	Richard Harvison	Chris Huffman	Vice President	No Place	Newcastle upon Tyr		NE12 6YY
Boomer's Artworx	Richard Harvison	Chris Huffman	Vice President	No Place	Newcastle upon Tyr		NE12 6YY
Boomer's Artworx	Bettie James	Chris Huffman	Sales Representativ	8907 E. Rosebud L	Scottsdale	AZ	85258
Bott & Company	One Contact	Chris Huffman		4 Privet Drive	Little Whinging	Surrey	
Bott & Company	Contact Two	Chris Huffman		4 Privet Drive	Little Whinging	Surrey	
Bott Limited	Contact One	Chris Huffman		Number12	London	England	
Bott Limited	Contact Three	Chris Huffman		Number12	London	England	
Botterils Convenienc	Contact Four	Chris Huffman					
Bottle Green Ltd.	Contact Five	Chris Huffman					
Bottline Great Britain	Contact Six	Chris Huffman					
Bottomline Technolo	Contact Seven	Chris Huffman					
Brandee's Bakery	Liz Dittmeier	Chris Huffman	Manager	41169 Alec Lane	Boise	ID	83705
Brandee's Bakery	Mackenzie Jensen	Chris Huffman	Owner	41169 Alec Lane	Boise	ID	83705
Brock, Lathers and F	Dr. Dieter Brock	Chris Huffman	Plastic Surgeon	FLC Lane		Atiu Island	
Brushw's Golfing Wo	Paul Brushman	Chris Huffman	Chief Golf Sales Mar	Level 36 989 York S	Sydney	NSW	2000
Cadbury	William Cadbury	Chris Huffman	Founder	Cadbury Trebor Bas	Birmingham		B30 2LU
Captains of Industry	IM Powerful	Chris Huffman	President	PO Box 270514	Houston	TX	77277-0514
CH Gourmet Coffee	Cecil Carter	Chris Huffman	Public Relations Mar	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Ernst Anderson	Ernst Anderson	Vice President of US	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Betty Browser	Betty Browser	Sales Representativ	10 Rouse St	Port Melbourne	VIC	3207
CH Gourmet Gifts	Fred Fenderline	Fred Fenderline	Sales Representativ	50c Rothbury Tce	London		EC4 12FT
CH Gourmet Gifts	Chris Huffman	Chris Huffman	CEO	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Allison Mikola	Allison Mikola	Sales Representativ	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Allison Mikola	Chris Huffman	Sales Representativ	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Melissa Pearce	Melissa Pearce	Assistant	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Juliette Rosseux	Juliette Rosseux	CFO	13 East 54th St.	New York	NY	10008
CH Gourmet Gifts	Jonathan Sommer	Chris Huffman	Vice President AsiaF	10 Rouse St	Port Melbourne	VIC	3207
CH Gourmet Gifts	Sarah Whiting	Sarah Whiting	Vice President Euro	50c Rothbury Tce	London		EC4 12FT

Lookup: All Contacts Contacts: 2 Chris Huffman

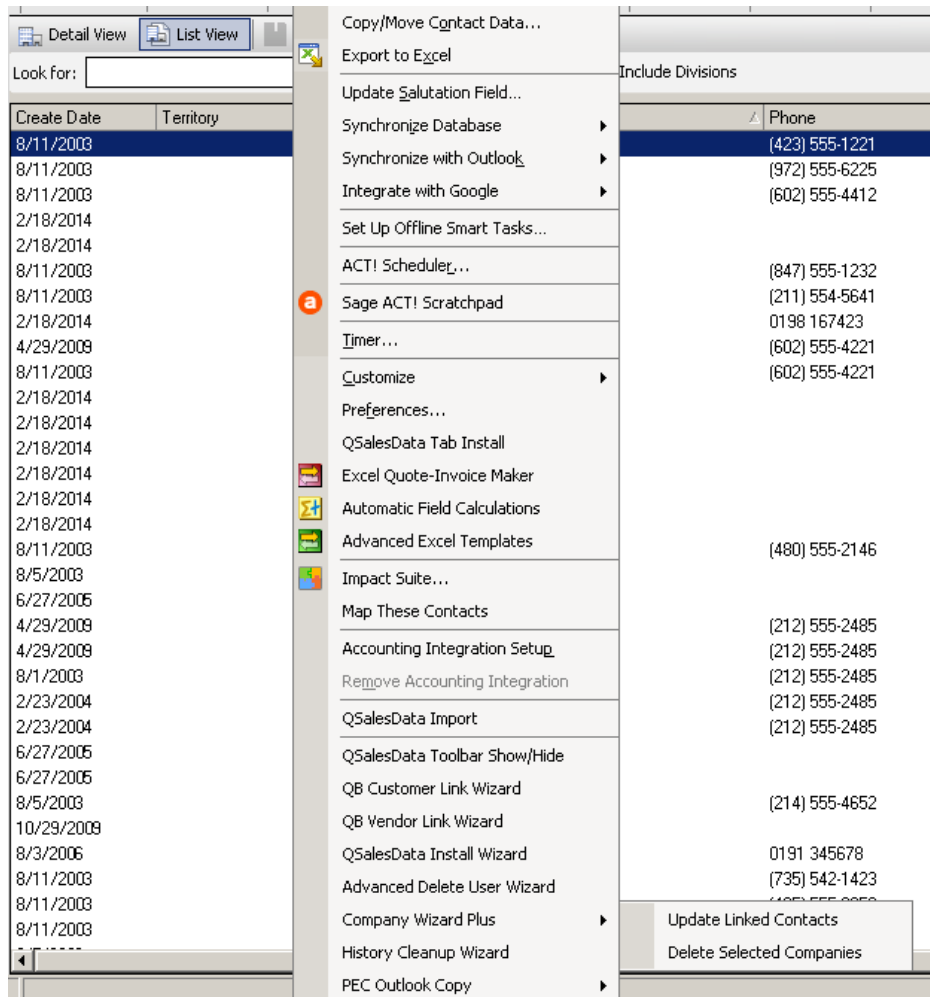
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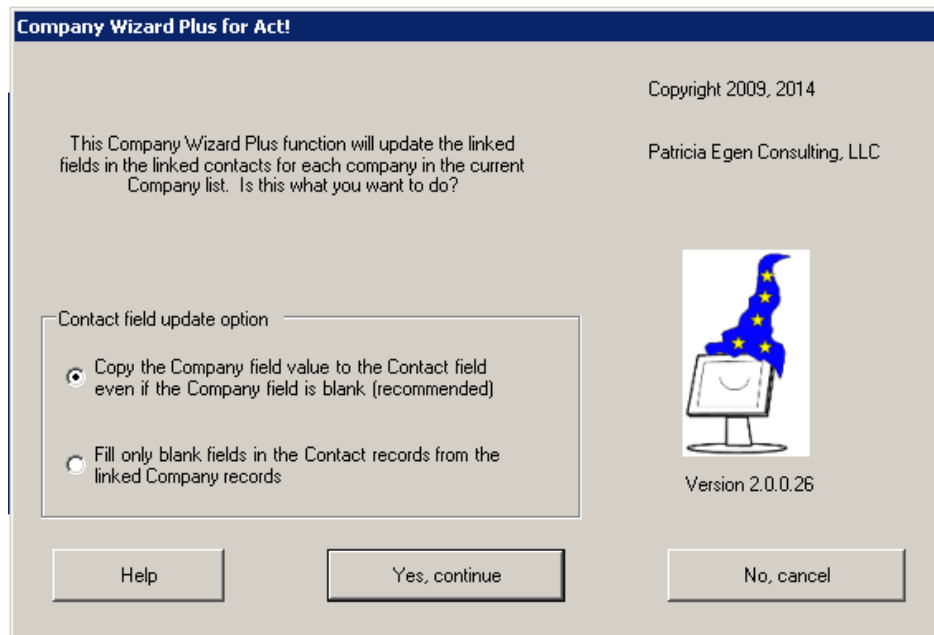
Company Wizard Plus

Update Linked Contacts Function

Usage:

1. Open ACT! and switch to the COMPANY LIST view.
2. Do a lookup of the companies you want to process. If you want to process all companies, do an explicit Lookup/All Companies to ensure that the proper list will be found by the tool.
3. Click on Tools and then on Company Wizard Plus and select the Update Linked Contacts menu item.
4. You will get a dialog box to confirm your action.





Here you can select from one of two modes of operation.

- The first option copies the field value from the company record to the contact record unconditionally. This option will even overlay a non-blank value in a contact record with a blank value from the company record. This is the recommended option as it follows the expectation that the contact fields will be exactly the same as the linked company fields.
- The second option only fills empty fields in the Contact records with non-empty values from the linked company records. Note that this is not the normal way that linked fields are supposed to work so that is why this is not the recommended nor default option.

When you are ready to process the selected Company records with the selected options, click YES, CONTINUE.

You will now see a progress box. If you change your mind during the process, click Cancel. However, any field updating already performed will not be rolled back.

A final box will show you the results of the operation.



Contact records have been updated as requested.

Sage ACT! Premium - DemoDBWithDupes

FileEditViewLookupCompaniesScheduleWriteReportsToolsHelpSynchronize NowConnect with LinkedIn®

Sage ACT!

BackForwardNewCallMeetingTo-DoNoteHistory

SearchGo

Companies

Detail ViewList View

☐ Edit Mode☒ Include DivisionsOptions

Company	Phone	Address 1	Address 2	City	State	ZIP Code	Web Site	Industry	ID/Status
Bott & Company		4 Privet Drive		Little Whinging	Surrey				
Bott Limited		Number12	Grimmauld Plac	London	England				
Botterills Convenience Stores									
Bottle Green Ltd.									
Bottline Great Britain Limited									
Bottomline Technologies									

Lookup

Company Field:

Company

Contains:

Go

More Options...

Related Tasks

Print Current ScreenChange ColumnsMail Merge to Company ContactsSort List

Welcome

Connections

Contacts

Groups

Companies

Calendar

Task List

Opportunities

Reports

Dashboard

Search

Lookup: CompanyNotes: 2Chris Huffman

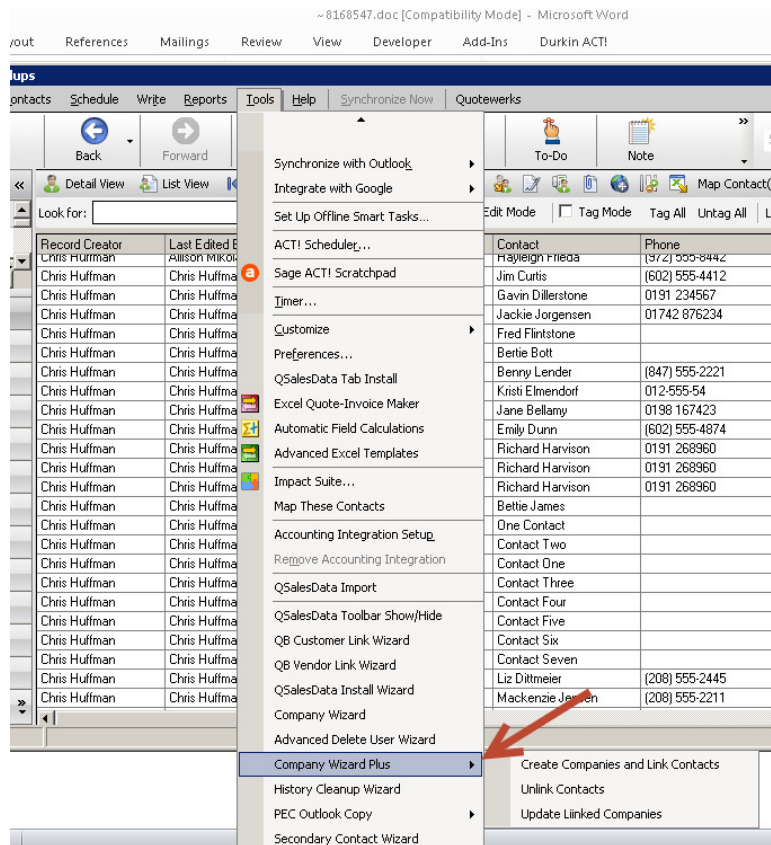
Company Wizard Plus

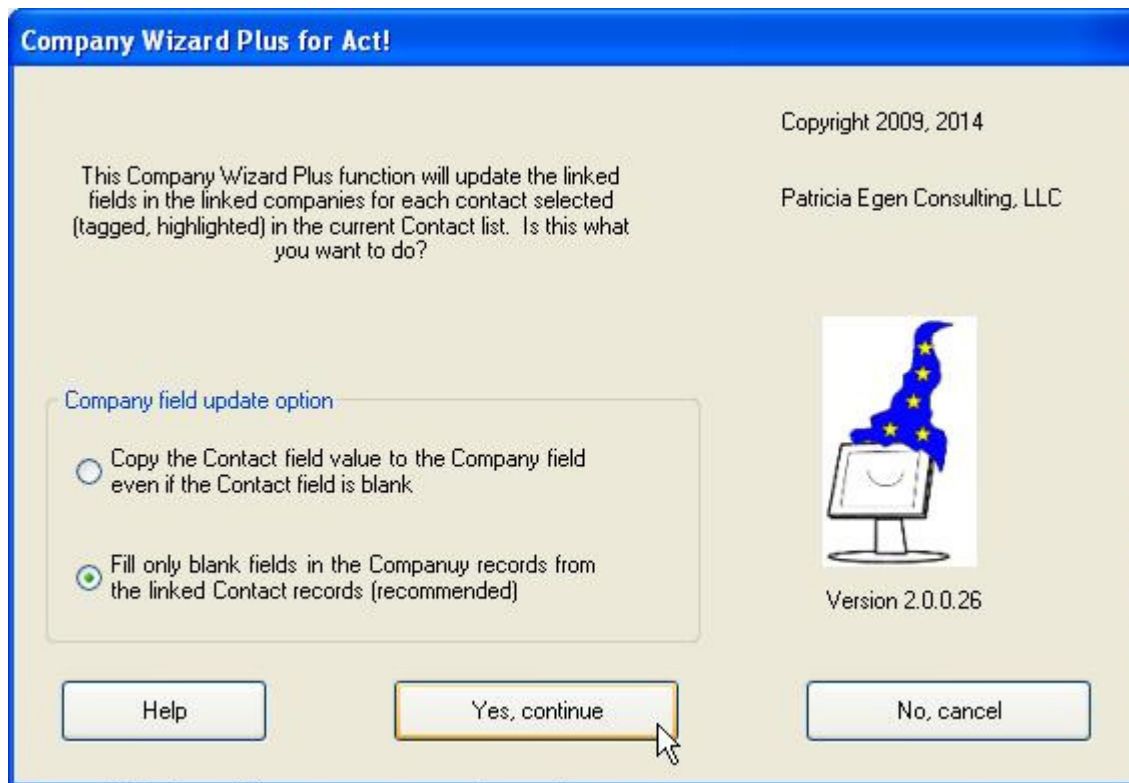
Update Linked Companies Function

Usage:

1. Open ACT! and switch to the CONTACT LIST view.
2. From the contact list select (highlight, tag) the contacts you want to process. If you want to process all contacts in your current Contact List then use the Tag All button at the top of the Contact List screen so highlight all the displayed contacts.
3. Click on Tools and then on Company Wizard Plus and select the Update Linked Companies menu item.

You will get a dialog box to confirm your action.





Here you can select from one of two modes of operation.

- The first option copies the field value from the contact record to the company record unconditionally. This option will even overlay a non-blank value in a company record with a blank value from the contact record. This is not the recommended option as the original intent of this process is to attempt to complete a possibly incomplete company record with information from linked contacts
- The second option only fills empty fields in the Contact records with non-empty values from the linked company records. This is the recommended option as noted above.

When you are ready to process the selected Contact records with the selected options, click YES, CONTINUE.

You will now see a progress box. If you change your mind during the process, click Cancel. However, any field updating already performed will not be rolled back.

A final box will show you the results of the operation.



Company records have been updated as requested.

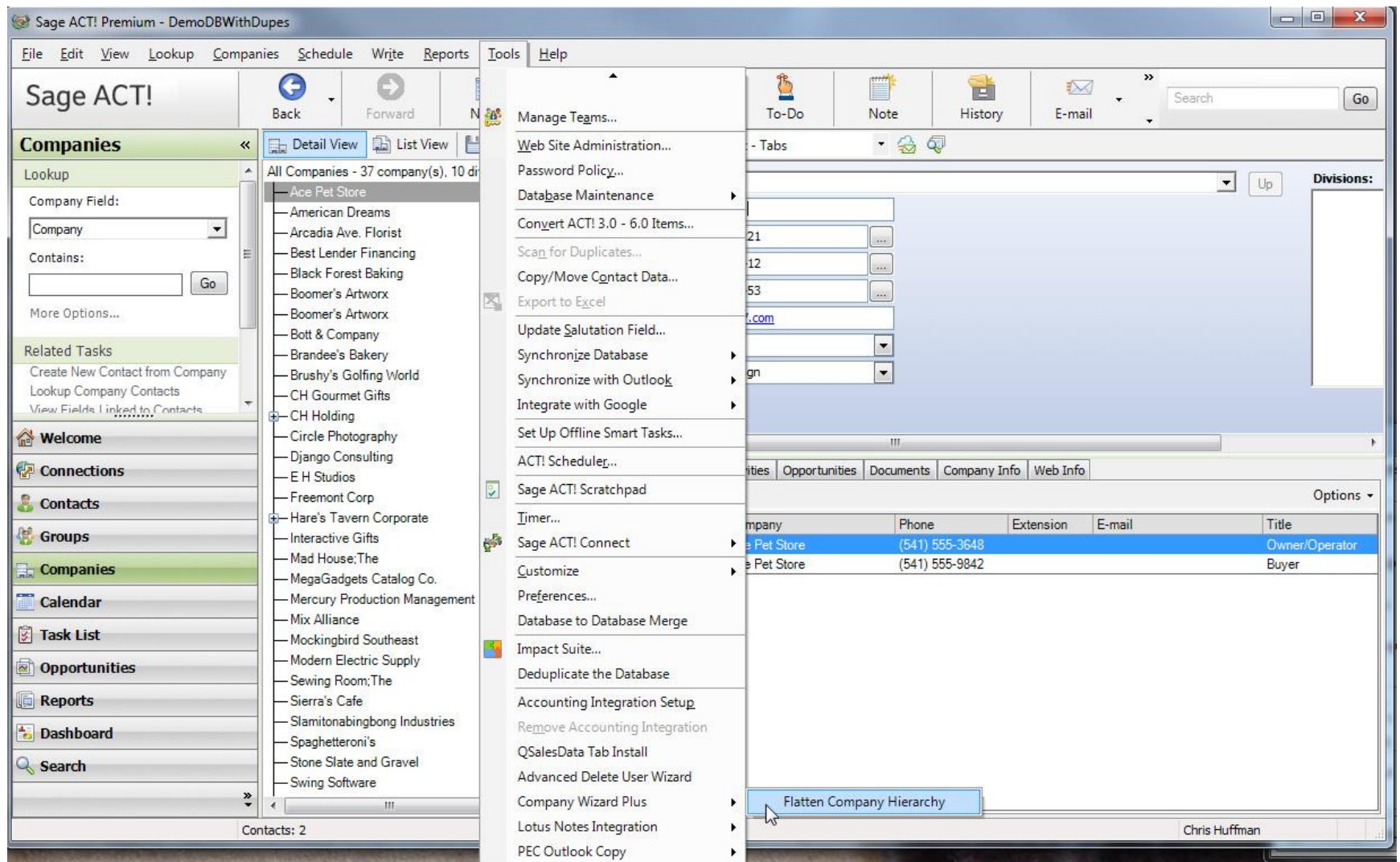
Company Wizard Plus

Flatten Company Hierarchy Function

This function moves all Sub-divisions of the displayed Company record to be immediate children (just Divisions) of the displayed Company record. Thus a multi-level Parent Company/Division/Sub-division hierarchy is flattened to a two level Parent Company/Division hierarchy only.

Usage:

1. Open ACT! and switch to the COMPANY Detail view.
2. Display the Parent Company (or Company Division) you want to flatten
3. Click on Tools and then on Company Wizard Plus and select the Flatten Company Hierarchy function.



The work is done immediately and the only response is a confirmation box when the work is done.

Company Wizard Plus

Delete Selected Companies Function

This function deletes the selected (highlighted) companies from the Company List. This allows multiple companies to be deleted in one operation. Although this function is available built-in to Act! v16 this brings this function to earlier versions of Act!

As this process is destructive and there is no Undo action make sure you have a backup of your Act! data base in case you delete a company record that you really wanted.

Usage:

1. Open ACT! and switch to the COMPANY List view.
2. Select using the mouse, left shift key, and/or left control key the Companies to be deleted.
3. Click on Tools and then on Company Wizard Plus and select the Delete Selected Companies option.

Sage ACT! Premium - DemoDBWithDupes

File Edit View Lookup Companies Schedule Write Reports Tools Help

Sage ACT!

Back Forward

Companies

Detail View List View

Lookup

Company Field:
Company

Contains:
Go

More Options...

Related Tasks

Print Current Screen
Change Columns

Welcome

Connections

Contacts

Groups

Companies

Calendar

Task List

Opportunities

Reports

Dashboard

Search

Lookup: All Companies

Company

- Boomer's Artworx
- Brandee's Bakery
- Brushy's Golfing World
- CH Gourmet Coffee
- CH Gourmet Gifts
- CH Gourmet Gifts
- CH Gourmet Gifts
- CH Gourmet Gifts - Administration
- CH Gourmet Gifts - Sales
- CH Gourmet Imports
- CH Holding
- Circle Photography
- Django Consulting
- E H Studios
- Freemont Corp
- Hare's Tavern Corporate
- Hare's Tavern Phoenix
- Interactive Gifts
- Jake Flakes Inc.
- Mad House, The
- MegaGadgets Catalog Co.
- Mercury Production Management
- MiniSoft
- Mix Alliance
- Mockingbird Southeast
- Modern Electric Supply
- Sewing Room, The
- Sierra's Cafe
- Slamitonabingbong Industries
- Spaghetteroni's
- Spin Recording Studio

Spelling... Alt+F7

Define Fields...

Design Layouts

Design Dashboards...

Manage Users...

Manage Teams...

Password Policy...

Database Maintenance

Convert ACT! 3.0 - 6.0 Items...

Scan for Duplicates...

Copy/Move Contact Data...

Export to Excel

Update Salutation Field...

Synchronize Database

Synchronize with Outlook

Integrate with Google

Social Updates

Set Up Offline Smart Tasks...

ACT! Scheduler...

Sage ACT! Scratchpad

Timer...

Customize

Accounting Integration Setup

Remove Accounting Integration

Preferences...

QSalesData Tab Install

Company Wizard Plus

To-Do Note

Search Go

Options

Address 2	City	State	ZIP Code	Web Site	Ind
Suite 25	Scottsdale	AZ	85258	www.boomersartwor	
	Boise	ID	83705	www.brandeebakery	
	Sydney	NSW	2000	www.brushygolf.com	
	New York	NY	10008	www.chgourmetgifts	
Suite 200	New York	NY	10008	www.chgourmetgifts	
Suite 201	New York	NY	10008	www.chgourmetgifts	
Suite 4	Dallas	TX	75214	www.circlephoto6.c	
Suite 200	Fenham	Tyne & W	NE57 00T	www.chgourmetgifts	
	New Brunswick	NJ	08901	www.freemontcorp.c	
	Denver	CO	80427	www.harestavern.cc	
	Phoenix	AZ	85258	www.harestavernaz.	
		NY	12548	www.interactive23.c	
Suite 40	Tempe	AZ	85281	www.jakeflakes.com	
	Manhattan Beach	CA	90266	www.1madhouse1.c	
	Chicago	IL	60601	www.megagadgets.c	
Suite 200	Central City	CO	80427	www.mercuryprodma	
	New York	NY	10003	www.minisoftny.com	
Suite JS16	Baton Rouge	LA	70831	www.mixalliance.cor	
	Chattanooga	TN	37402	www.mockingbirdso	
Suite 40	Tampa	FL	34655	www.ModernElectric	
	San Francisco	CA	94114	www.thesewingroom	
	Long Beach	CA	90807	www.sierrascafe.cor	
			85028	www.sioabb.com	
			06051	www.spaghetteroni.i	
			00121		

Update Linked Contacts

Delete Selected Companies

(423) 555-6221 123 Pasta Way

Chris Huffman

A window comes up saying that you are about to delete the selected companies in the list.



Move the click the Yes, continue button if you are sure you want to proceed.

Another warning box comes up asking again if you want to proceed.



If you are really sure click the Yes button. Delete processing then begins.

A Progress box will appear and increment as the deletion process continues. Press the Cancel button on the Progress box to interrupt the process. Company records already deleted cannot be recovered except from a backup of your Act! data base.

When the delete process is completed a status box will display showing the results of the operation.

