ACT! For Notes Administrator's Guide

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Introduction

About this Guide

This guide describes the fundamental information needed to learn how to set up ACT! For Notes 3.05. Many of the features and procedures described may be different from the features in earlier versions of ACT! For Notes. For example, Description File information is now stored in the Contacts database in ACT! For Notes 3.05.

What You Need to Know

The guide's instructions assume that you have basic understanding of Lotus Notes Release 5 terminology and concepts. You should understand views, documents, folders, bookmarks and navigation. In addition, you need to know basic administrative tasks, such as signing a database.

> *The figures shown in this guide were made using the U.S. version of ACT! For Notes and Microsoft Windows 98; therefore, some figures shown in this guide may be slightly different from the ones shown on your screen if your software configuration is different.*

Conventions Used in This Guide

Conventions used in this guide are:

TIP: This symbol indicates a tip or a helpful note.

Alert: This symbol displays when an action may cause loss of information in your ACT! For Notes Database.

This guide has these action button and menu command conventions:

- Menu commands appear in caps, as shown from this example: From the Action menu or button, choose CONTACT>CREATE NEW CONTACT.

- To indicate that you need to choose a command from a pull down menu or submenu, the > sign is used, as shown in this example: From the Action menu or button, choose COMPANY>CREATE NEW COMPANY.

How to Use this Guide

To help you find what you need when using this guide, the following list describes each chapter:

- Chapter 1: **Installing ACT! For Notes** describes the system requirements and installation procedures.
- Chapter 2: **Setting Up ACT! For Notes** shows you how to prepare your ACT! For Notes database for your users.
- Chapter 3: **Converting and Exporting Data** shows you how to import and export data with ACT! for Windows.
- Chapter 4: **Managing Your Data** describes the use of the Other action button.
- Chapter 5: **Customizing ACT! For Notes** describes ways to modify your ACT! For Notes database.
- Chapter 6: **Setting Up PDA Synchronization** describes how to enable ACT! For Notes for PDA synchronization.
- Chapter 7: **Accessing ACT! For Notes from a Web Browser** show you how to set up and use ACT! For Notes for web access.
- Chapter 8: **Keeping the Database Consistent** shows you how to maintain the data in ACT! For Notes.

Chapter 1: Installing ACT! For Notes

This chapter tells you:

- The system requirements for installing and using ACT! For Notes
- How to install ACT! For Notes on a server
- How to Upgrade ACT! For Notes

System Requirements

The following items describe the requirements for installing and using ACT! For Notes:

Server Information:

Domino Supported Platforms:
- Windows NT4.0/Intel
- Windows NT4.0/Alpha
- IBM AIX 4.3.1
- HP-UX 11.0
- Solaris/SPARC 2.6
- Solaris/Intel 2.6
- OS/2 Warp Server 4
- IBM AS/400 V4R2
- IBM S/390 V2R6

Memory Requirements:
- IBM AIX 4.3.1: Minimum 64MB, 128MB or more recommended.
- Microsoft Windows NT4.0 (Intel or Alpha): Minimum 48MB, 96MB or more recommended.
- Sun Solaris/SPARC and Intel Edition: Minimum 64MB, 128MB or more recommended.
- IBM AS/400 V4R2 or later: Minimum 64MB, 128MB or more recommended.
- IBM S/390 V2R6 (with UNIX Services Active): Minimum 128MB (64 MB for OS/390 and 64MB for Domino for S/390), 256MB or more recommended.

Disk Space:
- Minimum 750MB, 1G or more recommended.

Protocols:
- TCP/IP on all platforms.
- X.PC supported on all platforms, except IBM OS/400 and IBM OS/390.
- SPX, SPXII, NetBIOS/NetBEUI, VINES, X.25, SNA, and ISDN supported or selected platforms.

Lotus Notes Software
- Domino release 5.0.1 or later server software.

Workstation Requirements:

Operating System (one of the following)
- Microsoft Windows 95/98
- Microsoft Windows NT
- Microsoft Windows 2000
- Microsoft Windows XP Enterprise edition

Memory/Disk Space Requirements:
- 32MB RAM, 12MB disk space

Lotus Notes Software
- Lotus Notes release 5.0.1 or later (stand alone, remote dialup, or networked connection).

Optional
- Microsoft Windows Supported Mouse
- Hayes or 100 percent compatible modem
- Printer

To Enable Web Access to ACT! For Notes Databases

- Lotus Notes/Domino release 5.0.1 or later Server, mail enabled
- A server that is set up to run the HTTP server task

Installing ACT! For Notes on a Server

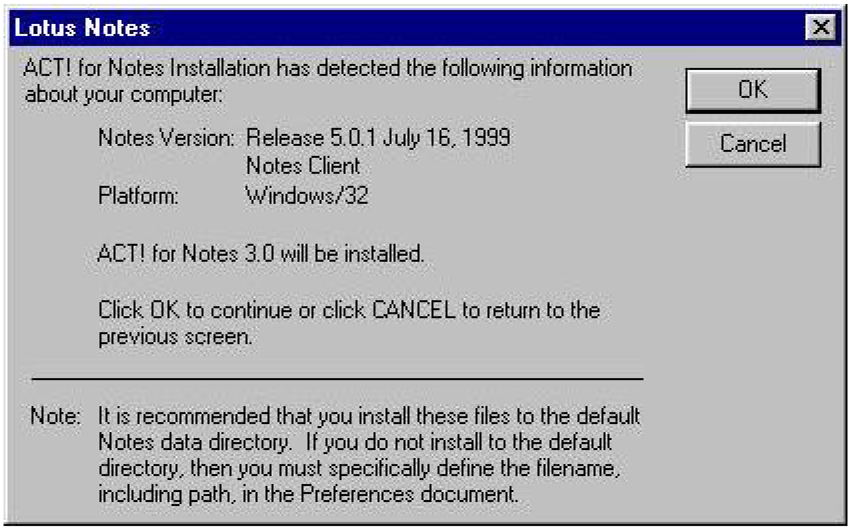
To install ACT! For Notes, you need to complete two tasks:

- Install ACT! For Notes directly on the Server; or, install it locally and make a replica on the Server.
- Add bookmarks for the following databases: ACT! For Notes Contacts and ACT! For Notes Help.

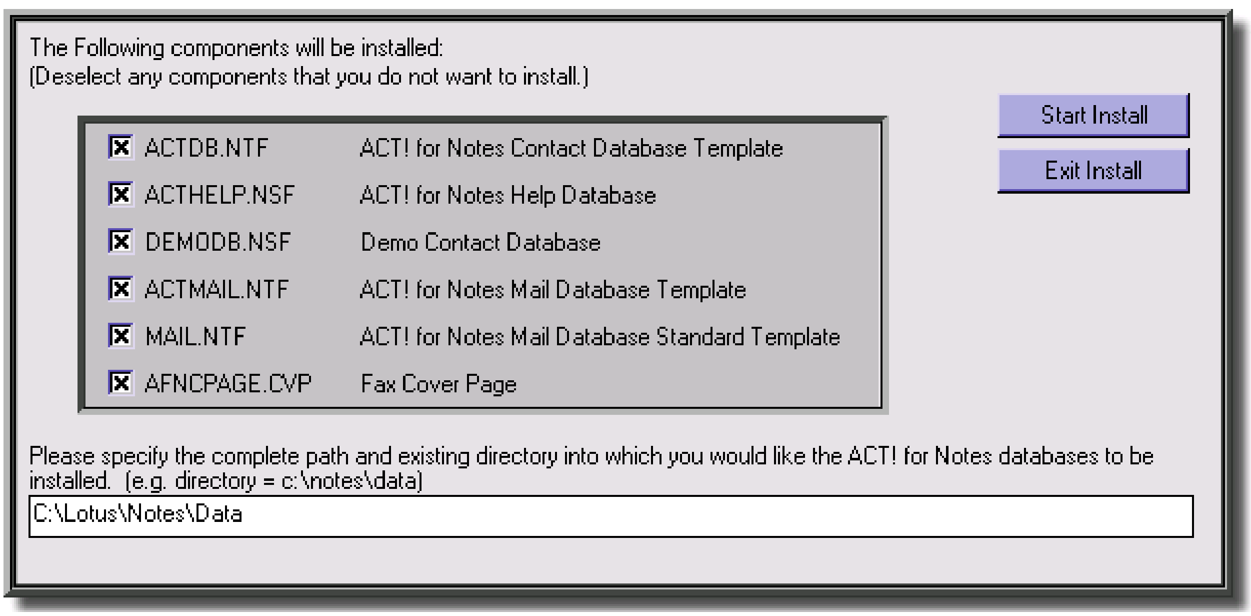
Note: The following procedure assumes you are using Microsoft Windows NT server software.

Installing ACT! for Notes on a Domino Server:

1. Start Windows, and then start Lotus Notes.
2. Insert the ACT! For Notes CD into the appropriate drive.
3. From the Lotus Notes File menu, choose DATABASE>OPEN. The Open Database dialog box displays.
4. Click Browse Button. A dialog box displays, asking you to choose a Notes database or template file. Select Notes Database.
5. Select the CD drive. The files on the CD appear in the dialog box.
6. Select the setup file in the dialog box. For example, to install the United States version, select US.NSF.
7. Click Select. The name of the setup database displays in the Open Database dialog box.
8. Click Open in the Open Database dialog box. The ACT! For Notes installation screen displays.
9. Click the Install ACT! For Notes button. A dialog box displays, displaying information about your computer and the version of Lotus Notes that you are running.



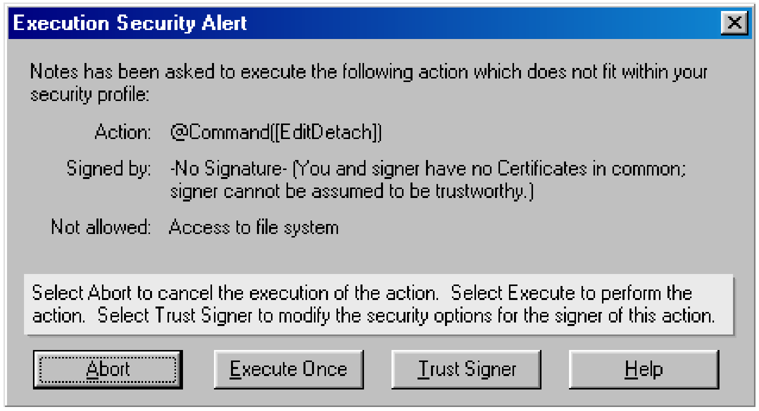
10. If Notes 5.0.1 or higher is detected, click OK to proceed. If you are running an earlier version of Notes, the dialog box will inform you that ACT! For Notes 4.1 cannot be used with your version of Notes. The Installation and Setup screen displays.



11. Deselect any database file you do not want to install. You can enter a different directory location if you do not want to install the database files in the default directory, for instance, C:\NOTES\DATA.

**If you choose to place these files in a folder, then the folder must already exist. The install process does not create folders.

Caution: If you receive the following Execution Security Alert message, click ***Trust Signer***. This indicates that you must sign the all of these .ntf and .nsf files once they are on the server with an ID that is trusted to run agents and send mail on that server.



If you want to install the files in a directory other than the default directory, create the new directory before starting the installation process. If you do use a different directory, the list of templates does not display the template files when you create the new ACT! For Notes databases from the templates. You will need to copy the templates to the Notes\Data directory. For more information, see Chapter 2, "Setting Up ACT! For Notes".

Caution: If you are upgrading ACT! For Notes, the template file names are the same, and you could overwrite the existing templates. It is recommended to backup those templates to another directory or rename them before continuing the installation process.

12. Click the Start Install button.

    If you did not deselect any files, the installer places the following databases and templates into the directory you specified.

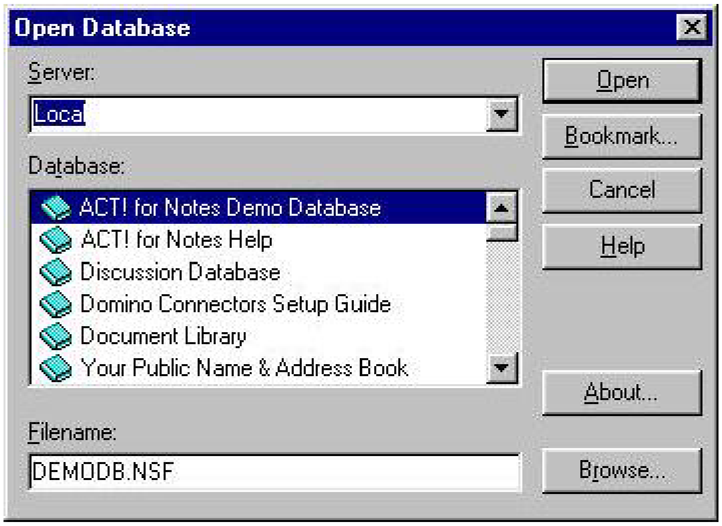
    - ACTDB.NTF, The ACT! For Notes Contact Database Template
    - ACTHELP.NSF, ACT! For Notes Help Database
    - DEMODB.NSF, The Demo Contact Database
    - ACTMAIL.NTF, The ACT! For Notes Database Mail Template (Full Calendar Integration)
    - MAIL.NTF, The ACT! For Notes Mail Database Standard Template (Low Calendar Integration)
    - AFNCPAGE.CVP, a fax cover page for use with the ACT! For Notes Fax Options

    A message displays when the installation is complete.

13. Click OK, and then Exit Install.

To Add Database Bookmarks to a Bookmark Folder:

1. From the File menu, choose DATABASE>OPEN. The Open Database dialog box displays.



2. Choose the server directory where you installed the ACT! For Notes databases.

   Note: If you install the files anywhere except Notes default Data directory, you need to click the Browse button to locate the ACT! For Notes files, before you complete the next step.
3. In the File Name text box, type the name of the ACT! For Notes Demo Database (DEMODB.NSF) and click Add Bookmark.

4. Select the name of the Bookmark folder for which you want to store the Bookmark.

5. Repeat the previous step to add an icon for ACTHELP.NSF, the ACT! For Notes Help database.

6. Click Done.

Upgrading ACT! For Notes

If you have a contact database created with an earlier version of ACT! For Notes, you need to replace the design of the contact database, and if you are using calendar integration, you need to replace the design of the Notes mail file to update the database designs.

To Upgrade from ACT! For Notes 3.05 and earlier:

- Use the installed ACTDB.NTF file on ACT! For Notes CD-ROM to replace the design of the corresponding Contact database.

- **Alert: Perform the next steps ONLY if your previous version of ACT! for Notes was lower than 3.0:**
  - ❑ Update the company and activity documents in the contact database by using two special agents. In the Admin Navigator, choose the Preferences view. Use the Actions drop down menu to run both 'Update Activities to version 1.5 or higher' and 'Update Company Addresses to version 2.0'. The agents update the activity and contact/company documents for use with the AFN 4.1 features in the contact database.

  - ❑ The preferences document will also need to be updated to version 4.1. In the preferences view, choose the action 'Update to version 4.1'.

- ❑ Since there is no Description file in version 4.1, you will want to copy and paste all User Fields, Pop-Up Entries, Other Application documents and Correspondence Headers into the appropriate view in the Admin Navigator of AFN 4.1.

- Users who wish to use calendar integration must update the design of their Notes mail file, using the ACTMAIL.NTF or MAIL.NTF template. For more information, see Chapter 2.

- Have users who use a local replica replicate with the server and automatically receive updated design and data after replacing the database design and updating the activity documents on the server. You will want to have them remove the Description and Reports database files from their workspace if the previous version of ACT! for Notes was below 3.0, as these databases are no longer needed for AFN 4.1. For more information about how to replace a database's design, see Lotus Notes documentation.

To upgrade the company and activity documents in the contact database (if previously running ACT! for Notes below 3.0):

1. Open your ACT! For Notes Contact database.

2. Click on the Admin Navigator and choose the Preferences view. OR Select VIEW>ADMINISTRATION>PREFERENCES.

3. From the Actions menu, select ACTION>UPDATE ACTIVITIES TO VERSION 1.5 OR HIGHER.

4. A dialog box displays, asking you to confirm. Click Yes to run the upgrade agent. The agent runs in the background.

5. From the Actions menu, select ACTIONS > UPDATE COMPANY ADDRESSES TO VERSION 2.0

6. A dialog box displays, asking you to confirm. Click Yes to run the upgrade agent. The agent runs in the background.

To upgrade the preferences document in the contact database (if previously running ACT! for Notes below 3.0):

1. Open your ACT! For Notes Contact database.

2. Click on the Admin Navigator and choose the Preferences view. OR Select VIEW>ADMINISTRATION>PREFERENCES.

3. Choose the action button, UPDATE TO VERSION 4.1.

Chapter 2: Setting Up ACT! For Notes

This chapter tells you how to set up ACT! For Notes by completing the following tasks:

- Creating databases from templates
- Set up access to the database
- Set up Preferences
- Check the Public Name & Address Book
- Document Level Security
- Create User documents
- Customize ACT! For Notes
- Create a full text index
- Create local replicas
- View replication or save conflicts

⌦**TIP**: It is recommended that you complete these tasks in the order listed.

Note: In the following procedures, when you are asked to save the document, either choose Save from the File Menu to save the document before closing it or save it when you choose Close from the File menu.

Creating Databases from Templates

When you install ACT! For Notes, it installs templates you use to create your own set of ACT! For Notes databases. The following templates are installed in the directory you specified:

- ACTDB.NTF, the contact database template.
- ACTMAIL.NTF, a customized mail file template that allows the Notes mail file to interact with ACT! For Notes for High Level Calendar Integration.
- MAIL.NTF, a standard Notes 5 mail file with only additional design elements for use with Low Level calendar integration.

** All templates must reside in the default notes directory in order to use them to create databases.

After you create your databases from templates, complete the remaining procedures in this chapter to set up and modify the databases for your needs.

Before creating databases from your templates, you must sign the templates with a trusted ID using the Notes server administrator tool. The ID should be able to run agents and route mail on the designated server.

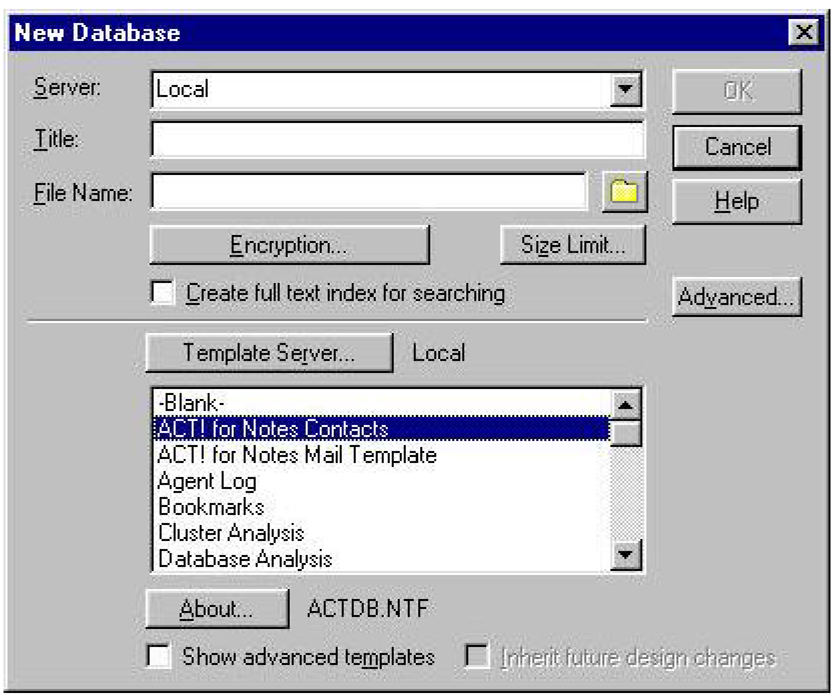
To sign the templates:

1. Start Domino Administrator.
2. Click on the Administration task button in the task bar.
3. Make sure you are using a trusted user ID to sign a template or database.
4. Select the server that stores the databases or templates that you want to sign.
5. On the Files tab, select the databases or templates that you want to sign.
6. Choose Tools - Database - Sign.
7. Select All design documents to sign every design element.
8. Click OK.

A dialog box shows the number of databases processed and the number of errors that occurred (if any). You can see details about the errors in the log file (LOG.NSF) and use database analysis to analyze the errors.

To create a contact databases from the template:

1. From the File menu, choose DATABASE>NEW. The New Database dialog box displays.



2. From the Server drop-down list, choose the server where you want to place the new database.
3. In the Title text box, type a title for the new database. The title is automatically used to create a filename (with a .NSF extension) in the File Name field.

4. From the list of templates, choose the ACT! For Notes contacts template (ACTDB.NTF). The list of templates is drawn from the default Notes data directory on local or on a specified server.

Note: When you choose a template from the list, the file name displays next to the About button. (e.g. ACTDB.NTF). The list of templates is drawn from the default Notes data directory on either the Local directory or from a specified server. Contact your Administrator if you cannot find the template.

5. Check the box marked Create full text index for searching and click OK. This allows you to perform a full text search through the fields of all documents.

   After the process is complete, an icon for the new database displays on the workspace. When you create the contacts database, the About Database document displays.

Setting Up Access to the Database

To use an ACT! For Notes database, you need to set up the Access Control List (ACL) for each database. The ACL lists all users, groups of users, and servers that can access a database, and specifies the level of access for each.

The level of security set in the ACL interacts with the document-level security set inside ACT! For Notes to determine what individual users can access..

To help you quickly set up and manage ACLs, you can create an ACL for groups of users with the same access rights. Database managers are given Manager access. Other users are given Editor or Author access with or without the ability to delete documents, depending on your circumstances. For more information about the various access levels, see the Lotus Notes documentation.

The following entries must be present in the ACL to ensure proper security functionality:

LocalDomainServers	Group containing all trusted servers in the current domain	• Manager access • Delete rights • [AFN Admin] role
OtherDomainServers	Group containing servers from other domains	• No Access
anonymous	Default web user	• No Access • Unspecified
[AFN Admin] role	Access to Administrative functionality	

Rules to go by:

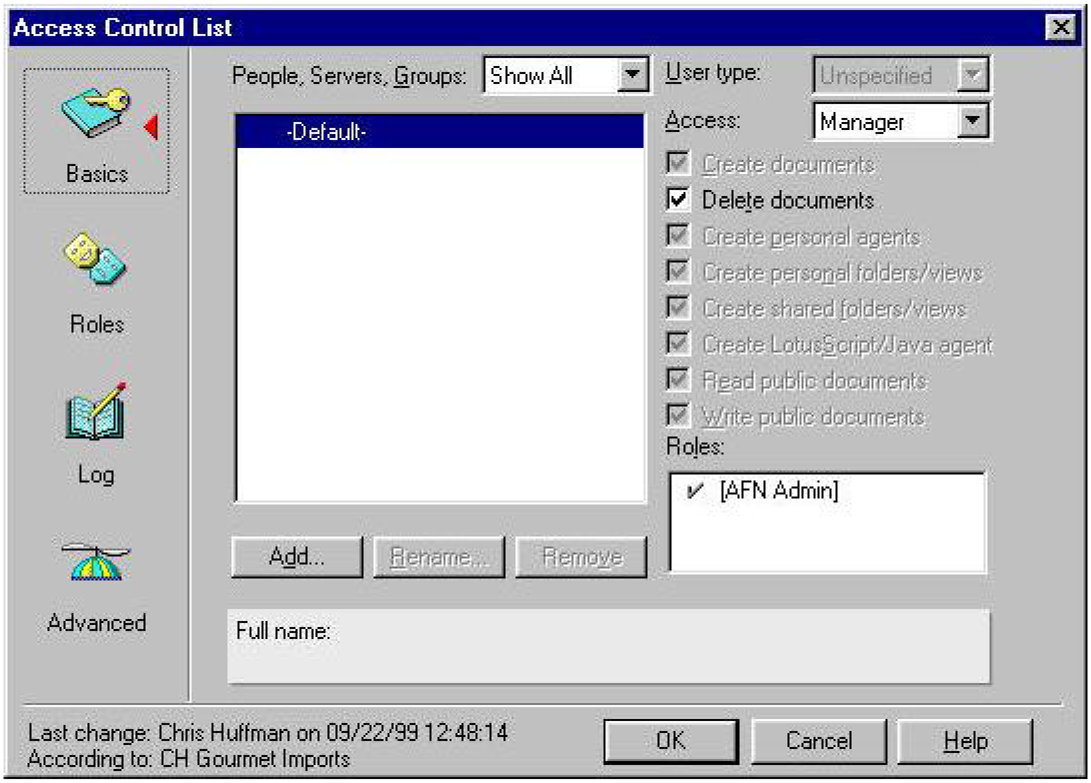
Preferences Document: Manager access and the [AFN Admin] role
User Field Labels and PopUp Entries (Edit and Create): Editor access and the [AFN Admin] role
General Users: Author (recommended) or Editor access, no special roles,

Alert: All users must have rights to create **Personal Views/Folders** on the server

To set up the Access Control List:

1. On the workspace, select ACT! For Notes contact database.

2. From the File menu, choose DATABASE>ACCESS CONTROL. The Access Control List dialog box displays.



3. Click the Add Button. The Add User dialog box displays.

4. Click on the 'blue person' icon to choose names groups and/or server from the public Name & Address book. Using the public Name & Address book helps avoid typing errors. The new entry name displays in the People, Servers, Groups drop-down list.

5. From the Access drop down list, select the security access such as Manager, Author or Reader. Users should be given Editor or Author access. Only database managers should have Manager access. In order for users to create and edit the Preferences document or Administration documents or run Administrative Agents, the role, [AFN Admin] must be checked.

6. (Optional) Select or deselect the appropriate "create" and "delete" options

7. Click on the Advanced button and select the "Enforce a consistent Access Control List across all replicas of this database" option.

** If you are planning on accessing ACT! For Notes via the web, set the default access to No Access and add a user called 'Anonymous' with No Access and no user type.

8. When finished, click OK.

Repeat this procedure for the Help database.

The [AFN Admin] Role

The Access Control List of the contacts database contains one role, [AFN Admin]. This role restricts access to certain elements in the database.

Access Restrictions :

- To create User Field Labels, Pop-Ups, Other Application documents, and Correspondence Header, you must have Editor access or higher and be in the [AFN Admin] role.
- To edit User Field Labels, Pop-Ups, Other Application documents, and Correspondence Header, you must have Editor or Designer access and be in the [AFN Admin] role, or have Manager access.
- To run any of the Admin Tools agents or set up/edit the Preferences document, you must have Manager access and be in the [AFN Admin] role.

Setting up Preferences

Proper execution of several functionalities requires values from the Preferences document, therefore it is recommended that Preferences is set immediately. When you set up ACT! For Notes preferences, you enter the following information:

- The path name and file name of the Help database. After you enter the file name information and save the Preferences document, the ACT! for Note contact database will be linked to the Help database.
- No matter where you are running ACT! For Notes , you must fill in the Server File Name and Local File Name fields in the Preferences document.
- (Optional) Group Security. Identify Notes groups that will have access to the database that you would like to use in Document Level Security.
- (Optional) Name Separators. You can change the name prefixes and suffixes, such as Mr. And Ms., that the contact documents use to separate first and last names for views.
- Inheritance. You can specify which fields to inherit when users create contact and company documents based on the current document.
- Pipeline. Enable Pipeline integration. Pipeline is a Sales Forecasting database that can integrate with ACT! For Notes, also sold by G2X.
- NAB Integration. Specify how contacts should synchronize with the Name and Address Book (NAB) for PDA synchronization.

To set up a Preferences document:

1. Open the ACT! For Notes contact database.
2. Click on the Admin Navigator and choose the Preferences view. OR From the View menu, choose ADMINISTRATION > PREFERENCES. If you are opening a new database, choose ADMINISTRATION > PREFERENCES from the Create menu to create a Preferences document.

3. Open the Preference document in edit mode. The Preference document displays.

4. In the Server File Name field and the Local File Name field, type the file name of the ACT! For Notes Help Database, ACTHELP.NSF.

   If you did not install the ACT! For Notes database files in your Lotus Notes default data directory, type the path name relative to the default Notes data directory to specify the location of the help files.

   If the help database is installed in the default Notes directory, C:\NOTES\DATA, type the name such as ACTHELP.NSF. If you are using the help database on the server and you installed the description database in F: \ACTNOTES\DATA, type F:\ACTNOTES\DATA\ACTHELP.NSF.

   If you are using ACT! For Notes on a local workstation and copied the help database to the workstation, you must specify its location on that workstation. For example, if ACTHELP.NSF is in C:\ACTNOTES\DATA, type C:\ACTNOTES\DATA\ ACTHELP.NSF. **All users should create their local replicas in the same place as there is only one Preferences document per database.

5. When you type in the database name in Step 4, ACT! For Notes reads the database title from the file and fills in the title field for you.

6. (Optional) If you plan to use Notes (Public NAB) groups to give additional read and/or write access to specific documents within the database, on the group security tab list the group names. It is best to select the names from the Public Address book: Click the pop-up icon next to the group name field to access it. Search for the group that you wish to add, highlight it and click the Add button. Click Ok when completed.

7. (Optional) Change or add entries to the Name separators section of the document.

**Within the contact document, there is only one field for the Contact's name. You should place the whole name is this field eg. Mr. John Smith PhD. The name separators will be used to help define the contact's first and last name. Define any other common name separators here. Punctuation, spelling and spacing must match exactly.

Note: When the Contact name itself contains a combination of characters that could be interpreted as a prefix or a suffix (eg. De in Adeline), the automatic Fist and Last name calculation will not be accurate. Users must use the Override First/Last name button in the Contact document to correct the name.

8. (Optional) You can select which fields to inherit when creating contacts and companies based on a current document.

9. (Optional) You can opt to configure with G2X Sales Pipeline.

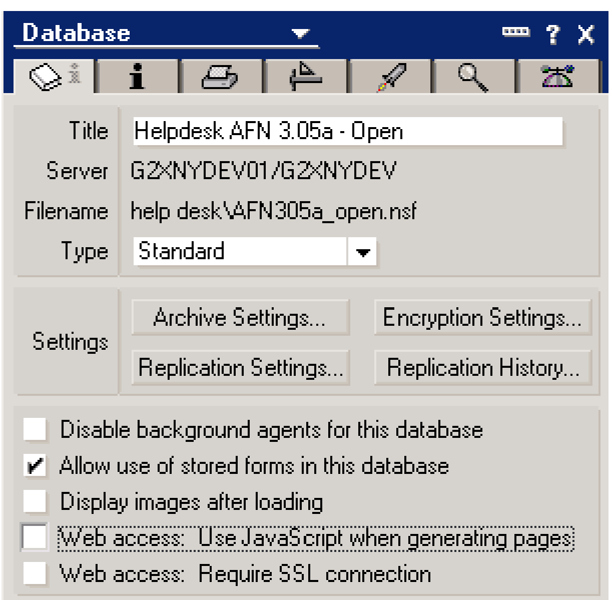
10. (Optional) If you plan to synchronize data with a NAB, you can select your NAB Integration preferences.

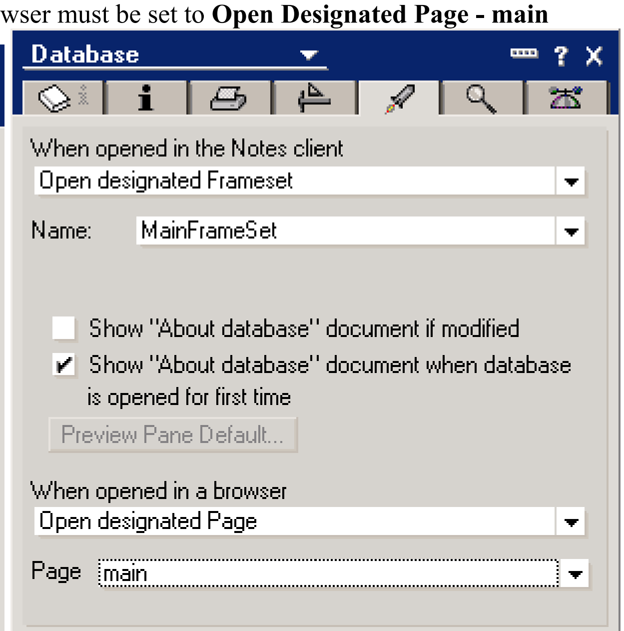
11. Save the document by choosing FILE>SAVE from the menu.

Additional Setup Procedures for Web Access

If you wish database users to be able to access the ACT! For Notes database from a Web browser, there are additional setup requirements:

- The ACT! For Notes Database must be running on a Lotus Domino 5.0.1 server or higher.
- The server must run the HTTP task.
- Ensure the database is properly signed.
- Internet passwords are set up for users who will be accessing ACT! For Notes via the web.
- The ACT! For Notes Contact database must be in your default Notes directory or in a path relative to it.
- The URL for your database will be http://[IP address of your server]/[path to database relative to default Notes directory]/. **The trailing slash is a MUST!
- Users' Internet login name and password are specified in their person document in the Public Address Book.
- For maximum Internet security, make the Default in your ACL No Access, and create an entry called anonymous with No Access (Unspecified user type).
- In Database properties, the option **Web Access: Use JavaScript when Generating Pages** must be de-selected
- In database properties, the launch option for the browser must be set to **Open Designated Page - main**





-

Consult the Lotus Domino documentation for further information.

Creating User Documents in AFN

You will need to create a user document for each individual who will use ACT! For Notes. A user document provides information and personal settings for each person who has access to the database. For example, the document lists the person's home and business address, telephone and fax numbers, and e-mail information. You can create a user document in one of two ways.

- Create document a single user document at a time.
- Import multiple people from the Name & Address Book at once.

After you create a user document, you can view, edit or delete it.

You must use a hierarchical naming scheme in Notes to create User documents in ACT! For Notes. This hierarchical name is stored on the user document in a hidden field called Canonical Name, and is critical to scheduling, security, and personal views.

This section tells you how to:

- Create User documents one at a time
- Import multiple people from the Name & Address Book
- Set up User Preferences on User Documents
- View and edit user documents
- Delete user documents

To create user documents one at a time:

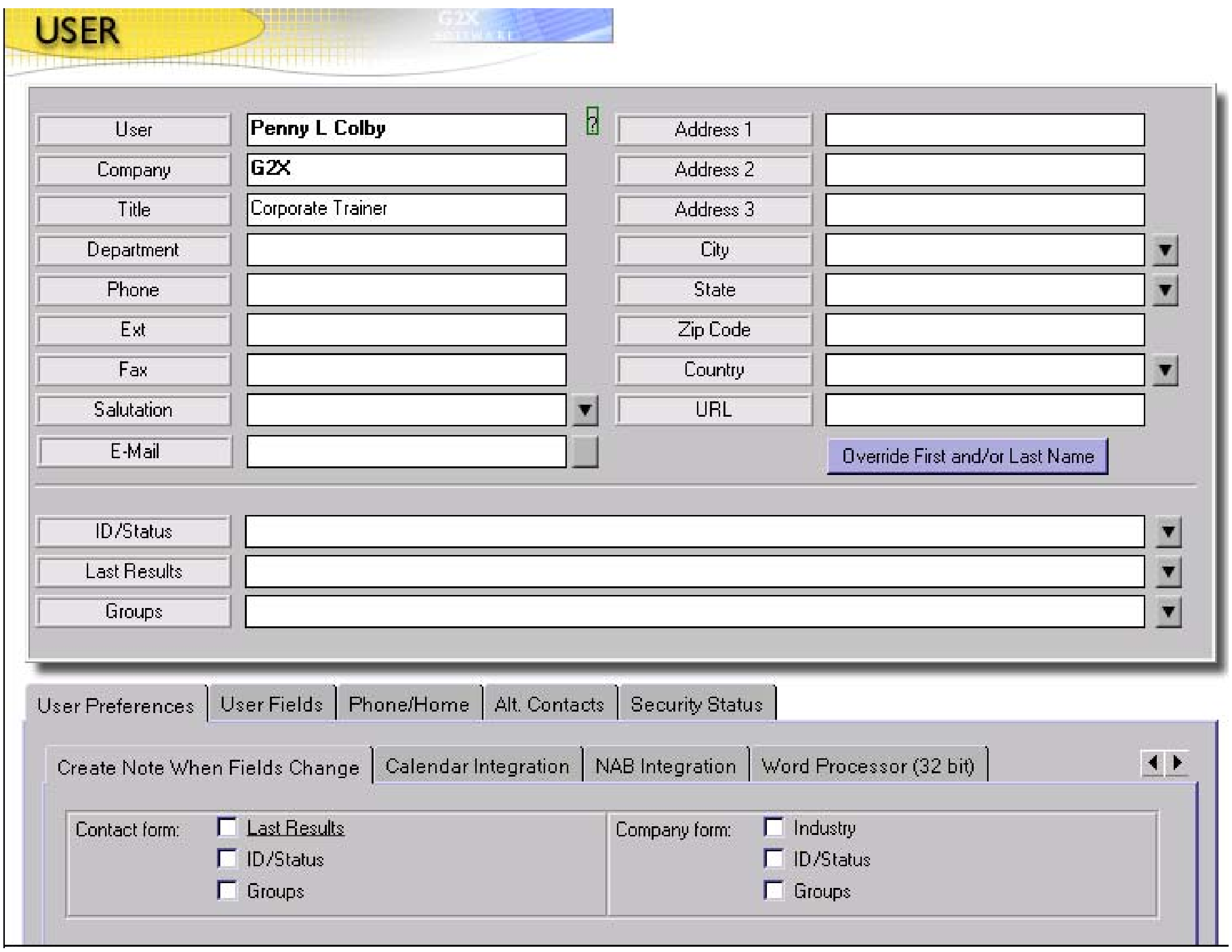
1. Open the ACT! For Notes contact database.
2. Click on the Admin Navigator, the default view is the User List.
3. From the Create Menu, choose USER. The name dialog box displays.

4. From the drop-down list, choose the address book that contains the name of the person for whom you want to create a user document. The list of people in the book displays.

Alert: You must have access to the Public Name & Address Book when creating users to ensure that proper canonical name is recorded.

5. Select a person's name and click OK.

   The new user document displays in edit mode The name of the person that you selected displays in the User field. The organization part of the hierarchical name displays in the Company field.



6. Enter the basic information about the user in the Company, Title, Phone, Address, City, State and Zip Code fields.

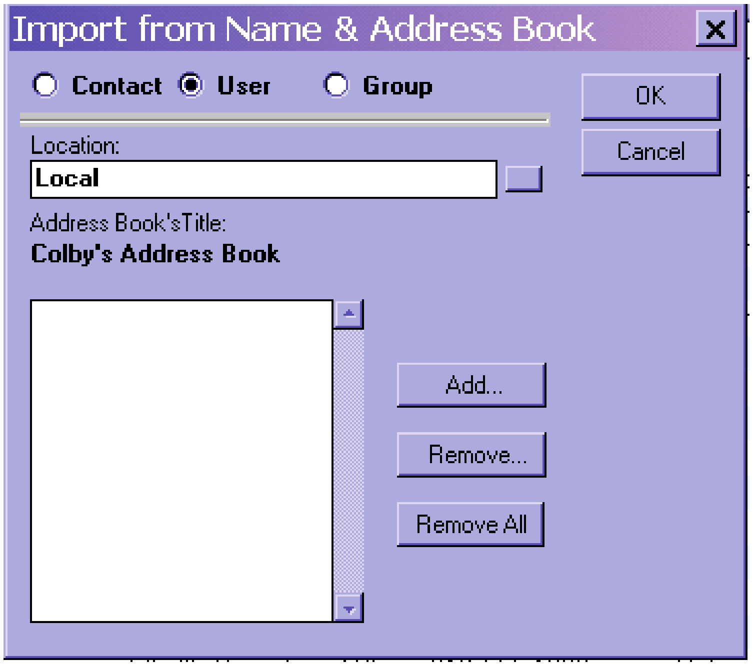
   Click the Groups pop-up icon to add this user to an ACT! For Notes group.

To import people from Name & Address Book:

1. Open the ACT! For Notes contact database.

2. Click OTHER>IMPORT FROM NAME & ADDRESS BOOK.

The Import from Name & Address Dialog box displays.



3. Select the User radio button.

4. Select the Name & Address Book you wish to use. You cannot import Users from a Local address book since it does not store canonical names.

5. Click Add to view a list of people in the Name & Address Book.

6. Select the names of the people for whom you want to create a user documents and click OK.

A list of names selected displays in the dialog box

7. When completed, click OK. The User documents are automatically created and can be viewed in the User list.

"User Preferences" configures the following options for this user in the database.

1. The Create Note when fields Change options for a Contact Form or Company Form determine whether ACT! For Notes creates a note containing the new information when one of these fields changes.

   For example, if the Last Results option is selected for the contact form and the user makes a change to that field, ACT! For Notes stores the new information from this field in a note.

   **This is only true for contact and company documents in which the user is the document manager.

   Check the boxes for fields for which you want these notes created for this user.

2. The Calendar Integration fields cause ACT! For Notes to interact with Notes mail file such that the ACT! For Notes calendar and the mail file calendar remain consistent and ACT! For Notes invitations are sent to the user's mail file when activities are scheduled for them.

You must have upgraded the design of the user's mail file database and selected the correct Calendar Profile options for this to work completely. See "Enabling Calendar Integration" in this guide or Chapter 8 in the User's Guide for a more complete discussion of Calendar Integration.

Check both boxes in this area if you want to enable Calendar Integration for this user.

3. NAB Integration (Optional). This feature allows you to select the Personal NAB for PDA synchronization of contact documents.

4. (Optional) The Word Processor (32-bit) feature allows you to select the type of word processor used for creating Word Processor Documents. The selected Word Processor will automatically launch when a Word Processor Document is created.

   ACT! For Notes works with the following (32 bit) word processors: Lotus Word Pro, Microsoft Word and Corel Word Perfect.

5. The Security Settings feature allows you to set Security Preferences for the following features:

   Set Default Security Status on documents the user creates.

   - Determine if the document is a public or private document.
   - Select the document manager(s).
   - Determine which user(s) have read/write access to the document.

6. The **Signature** feature allows you to attach a piece of text, an image or an HTML file to append copyright message or personal matter when using e-mail within AFN.

7. Save the document.

** You must set up the User Preferences information on each User Document individually.

To view, edit or delete an existing user document:

1. Open the ACT! For Notes contact database.

2. From the View menu, choose ADMINISTRATION>USER LIST.

   A list displays in the view pane.

3. View, edit or delete as you would any standard Notes document.

Enabling Calendar Integration

• **No Calendar Integration** – No communication between ACT! For Notes and your personal mail file calendar. No action is necessary.

• **Low Level Calendar Integration** – This is a one-way exchange of information, which synchronizes the ACT! For Notes calendar with your mail file calendar. Also, ACT! For Notes invitations (notifications) are sent to your mail file when activities are scheduled for you by another user.

1. In the Calendar Integration section of the User's User Document, select 'Synchronize Calendar with My Mail File' and 'E-Mail Invitations to My Mail File'.

2. Replace the User's mail file database design with the ACT! For Notes Standard Mail Template (Mail.ntf)

• **High Level Calendar Integration** – The ACT! For Notes calendar and your personal calendar communicate and data is exchanged and synchronized between the databases. A change in either database will be reflected on both databases.

1. In the Calendar Integration section of the User's User Document, select 'Synchronize Calendar with My Mail File' and 'E-Mail Invitations to My Mail File'.

2. Replace the User's mail file database design with the ACT! For Notes Mail Template (Actmail.ntf)

3. Change the Mail File Calendar setting for each user. Choose the Tools action button, then select Preferences. Find the ACT! For Notes tab. Select 'Send ACT! For Notes Activity Changes to ACT! For Notes' and 'Synchronize Calendar Entries with ACT! For Notes'. Then direct your mail file to the ACT! For Notes database on the server as well as on local (if necessary).

Customizing Field Labels, Pop-Ups, and Other Features

This section tells you how to customize the following features:

- User Field labels and pop-ups
- Letter, Fax and Email templates
- Agents
- Links to other Lotus Notes databases

Note: You must be in an Editor and have the [AFN Admin] role, to perform the following procedures.

Customizing Field Labels and Pop-Ups

You can customize the user field labels that appear on the Company, Contact, Activity and User Documents. Customizing allows you to use labels that are familiar to your users and applicable to the tasks they perform.

You can also create pop-ups to provide a list of commonly used values for fields on the Company, Contact, Activity, Notes and User documents. When you use ACT! For Notes, you access a pop-up list by clicking a pop-up icon that is located next to the field.

This section tells you how to:

Create new user field labels

Edit user field labels

Create new pop-up lists

Edit pop-up lists

Available User Field Labels

20 Company User Field Labels
20 Contact User Field Labels
20 User User Field Labels
4 Activity User Field Labels

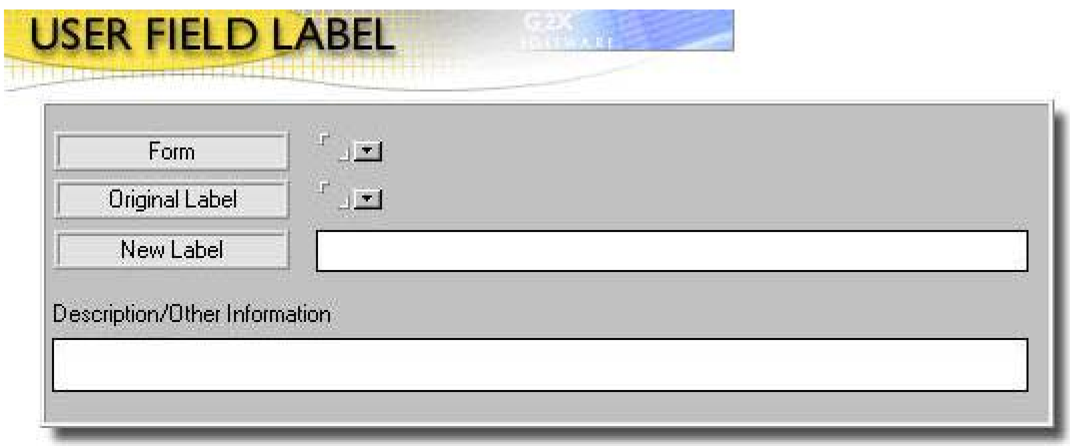
** ACT! For Notes will not allow you to create more user field labels than are available on the form.

Note: You must be an Editor and have the [AFN Admin] role to perform the following procedures.

To create new user field labels:

1. Open the ACT! For Notes Contact database.
2. Click on the Admin Navigator and choose the User Field Label view.
3. From the Create menu, choose ADMINISTRATION>USER FIELD LABEL.

A blank new User Field label document displays.



4. Click the Form pop-up icon. The Select Keywords dialog box displays.
5. Select the form, such as Contact, in which you want to create a user field label and click OK.

The form name displays in the Form field

In the Original Label field, click the pop-up icon and select the user field you want to define from the dialog box. For example, select User 1. (The Original Label will *always* be User 1 – 4 or User 1 – 20 depending on the form.)

In the New Label field, type the new label. The new label will appear in the selected type of form in the User Fields area.

Click the Exit button to save this new label

Repeat Steps 3 through 7 to create additional user field labels. Type User 2, User 3 and so on in the Original Label field for each additional user label.

To edit user field labels:

1. Open the ACT! For Notes Contact database.

2. From the View menu, choose ADMINISTRATION>USER FIELD LABELS or click User Field Labels in the Admin navigation pane. A list of original labels for the Company, Contact, User and Activity forms displays.

3. To change a field label, select and open it in Edit Mode by clicking on the Red Pencil Icon .

4. In the New Label text box, type the new label name.

** No other field should be changed on the form except perhaps the description/other Information field. ALSO, existing data will not reflect the changes until the values are manually changed.

5. Click the Exit button.

The Customized field label displays in the User Field Labels view.

6. Repeat Steps 3 through 5 for each field that you would like to change.

Fields that can have an associated Pop Up Entry:

Form	**Field**
Activity	Type
	Regarding*
	*Based on a value in the Type field
Company	City
	State
	Country
	Industry
	ID/Status
	Groups
	Billing City
	Billing State
	Billing Country
	Shipping City
	Shipping State
	Shipping Country
Contact	City
	State
	Country
	ID/Status
	Last Results
	Groups
	Alt. City
	Alt. State

	Alt. Country
Note	Type Regarding* *Based on a value in the Type field
User	City State Country ID/Status Last Results Groups Alt. City Alt. State Alt. Country

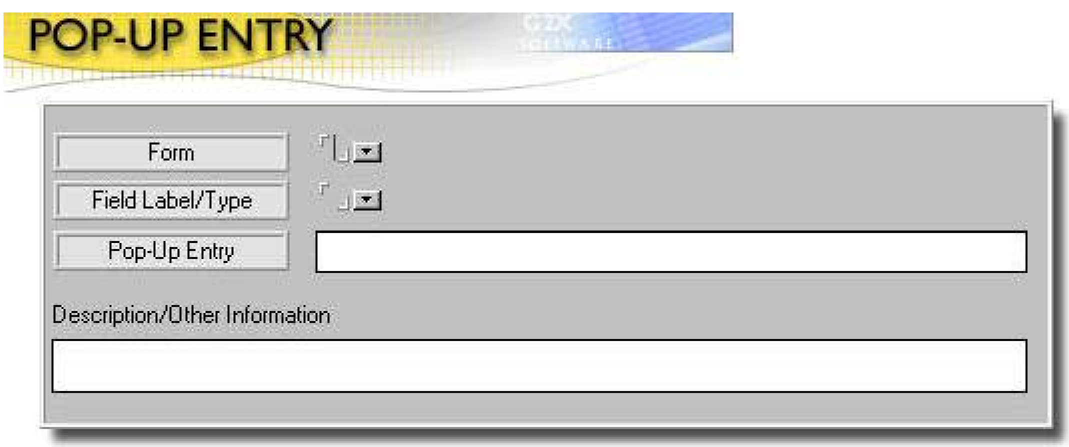
To create new Pop-up lists:

1. Open the ACT! For Notes Contact database.

2. Click on the Admin Navigator and choose the Pop Up Entry view.

3. From the Create menu, choose ADMINISTRATION>POP-UP ENTRY.

A blank Pop-up document displays.



4. Click the Form pop-up icon. The Select Keywords dialog box displays listing the Contact, Company, User, Activity, and Notes forms.

5. Select the form for which you want to create a pop-up list and click OK.

The form name displays in the Form field in the Pop-up for the document.

6. In the Field Label/Type field, click on the pop up icon and choose from the list of available fields. For example, if you want to create a pop-up list of States, choose State in the field.

Note: You can create a Pop-up list for any field that has a pop-up icon next to it in an ACT! For Notes document.

7. In the Pop-up Entry field, type an entry for the pop-up list. Press the Enter key and type the next item.

8. After adding all the items to the list, click the Exit button to save the document.

9. Repeat Steps 2 through 7 to add another pop-up list.

Note: To create a pop-up list for the Regarding field in the Activity or Note form, select the type of activity in the Field Label/Type field. (The Regarding pop-up is based on the type of activity.) Type the list of items for the Regarding field in the Pop-up Entry field.

To edit pop-up lists:

1. Open the ACT! For Notes Contact database.

2. In the Admin Navigation pane, click Pop-ups.

The pop-up lists appear in the view pane.

3. Select the pop-up list that you want to change and open it in Edit mode.

Note: Be sure to select the list itself not the header.

The Pop-up document displays.

4. In the pop-up Entry field, change the item(s) or add new ones. Press the Enter key after you add an item to the list.

5. After making all desired changes, click the Exit button to save the document.

Adding a Logo to a Fax Form

For a professional look, you can add your company's logo to your fax messages. To add a logo, you need to create a correspondence header document in the Contact database. The fax logo will appear on all outgoing fax messages sent from ACT! For Notes. A header can be either an image or text and you can create more multiple Correspondence Header documents to use as fax stationary.

To add a logo to the fax form:

1. Open the ACT! For Notes Contact database.

2. Click on the Admin Navigator and choose the Correspondence Header view.

3. From the Create menu, choose ADMINISTRATION>CORRESPONDENCE HEADER.

4. The Correspondence Header document displays.

5. Enter "Fax" in the Form field. If you click the pop-up, Fax is the only choice.

6. In the Header/Logo field, choose Import from the File menu and select the graphic to import. Click OK.

Note: You can also insert the logo by moving the graphic from the Clipboard and pasting it in the field, or by typing in text.

7. Save the document and close it.

8. Open the contact database and create a new fax document (select the header you want to display) to check that it displays.

Linking ACT! For Notes to Other Lotus Notes Databases

You can access other Lotus Notes databases by linking the databases to AFN.

To create a link to another database:

1. Open the Contact database.

2. Click on the Admin Navigator, and choose the Other Applications view.

3. From the Create menu, choose ADMINISTRATION>OTHER APPLICATION.

The Other database document displays.

4. Type the other database information, such as database name, title and server location.

5. If you want to create a form in the other database, type the name of the form as it displays in the design of the other database.
6. If you want to open a specific view, type the name of the view as it displays in the design of the other database.

7. In the Purpose field, type the text that you want to appear as a command to go to the link.

8. Save the document.

   Once the document is saved, you will be able to go directly from your ACT! For Notes database to the specified view or form by selecting Application on the Action Bar, then, choosing Other Application.

Creating a Full Text Index

Full text index is a feature of Lotus Notes. The index allows you to perform a full text search that looks at all data stored in the fields of all the documents in a view. When you create a new database, you may want to create a full text index for it. After you create the index once for a database on a server, Lotus Notes automatically updates it.

You can set the frequency of the server update in the Properties for Database dialog box. Click the Full Text tab and choose frequency from the Update Frequency drop-down list.

Note: Local databases are not automatically updated.
Alert: You must be database manager in the ACL to create the full text index.

To create a full text index for a database:

1. Open the ACT! For Notes database.

2. From the File menu, choose DATABASE>PROPERTIES.

3. Click the Full Text tab (magnifying glass icon).

4. Click Create Index.

The Full Text Create Index dialog box displays.

5. Select the index settings and index breaks you want to use and click OK.

    The indexing begins. The amount of time requires to generate an index varies, depending on the options selected and the amount of text in the database. A message displays telling you when the index is complete.

Creating Local Replicas

To create a full replica

You can create a local replica of a database that contains all of the database's documents and design.

1. Open the ACT! For Notes database.

2. From the File menu, choose REPLICATION>NEW REPLICA.

3. Fill in the fields in the New Replica dialog. For Server, select Local. Enter a file name for the replica. For Create, click immediately.

4. (Optional) Do one or both of the following:

    - To encrypt the replica so that it can be opened only with your user ID, click Encryption, select "Locally encrypt this database," and click OK.
    - To create an index so you can perform full text searches on the replica, select "Create full text index for searching."

5. Click OK.

Note: Notes adds a bookmark entry and a database entry to the Replicator for each local replica you create. You can use the Replicator page to update your replicas.

To create a partial replica

1. You can create a local replica of a database that contains selected documents, shortened documents, and/or selected parts of the database's design. You can also specify a maximum size for a local replica.

2. Open the ACT! For Notes database.

3. From the File menu, choose REPLICATION>NEW REPLICA.

4. Fill in the fields in the New Replica dialog. For Server, select Local. Enter a file name for the replica. For Create, click Immediately.

5. (Optional) To limit the size of the replica, do one or both of the following:

- To specify the maximum size for the replica, click Size Limit, select a number of gigabytes, and click OK.
- To specify selective replication settings click Replication Settings, specify the settings you want, and click OK.

For more information, refer the Lotus Notes Documentation.

6. (Optional) Do one or both of the following:

   - To encrypt the replica so that it can be opened only with your user ID, click Encryption, select "Locally encrypt this database," and click OK.
   - To create an index so you can perform full text searches on the replica, select " Create full text index for searching."

7. Click OK.

Note: Notes adds an entry for each local replica you create to the Replicator workspace page. You can use the Replicator page to update your replicas.

Viewing Replication or Save Conflicts

ACT! For Notes provides a Replication Conflict view so that you or other users can quickly see any replication or save conflicts after replicating a database. The Replication Conflict View displays replication and save conflicts in both contact and company documents.

You need to resolve any conflicts manually and then remove replication or save conflict documents. Clicking the Remove Documents from View button does not resolve the conflicts. It removes the document from this view. You should remove the documents only after the conflicts have been resolved.

To view replication or save conflicts:

1. Open the ACT! For Notes Contact Database.

2. Click on the Admin Navigator and choose the Replication Conflicts view. OR From the View menu, choose ADMINISTRATION>REPLICATION CONFLICTS.

ACT! For Notes displays the replication or save conflicts view.

To remove document(s) from the Replication Conflict view:

1. From the View menu, choose ADMINISTRATION>REPLICATION CONFLICTS.

ACT! For Notes displays the replication or save conflict view.

2. Both the Original document and the conflict will display in this view. You need to compare the documents, make any necessary edits to the original document and then delete the conflict.

3. Once you have deleted the conflicts, select the document(s) that you want to remove.

4. Click the Remove Documents from View button on the Action Bar. (This does not resolve the conflict, it simply removes them from this view.)

Chapter 3: Converting and Exporting Data

This chapter tells you how to:

- Convert ACT! For Windows 2.x, 3.x, 4.x or 2000 contact, activity, notes and history database information and append it to an ACT! For Notes database.
- Export ACT! For Notes information into an ACT! for Windows 2.x database.

Alert: When you convert or import data, you append information to the information already in the database. Therefore, you must not convert the same data more than once or you will have duplicate information in the database.

The conversion procedures are different for ACT! for Windows 2.x, 3.x and 4.x databases. Choose the conversion procedure that corresponds with your version.

Convert Act! For Windows 2.X to ACT! For Notes 3.x

When converting an ACT! For Windows database to an ACT! For Notes database it is a two-part process:

Note: Beginning the Data Conversion ensure that ACT! For Windows and ACT! For Notes are installed on your **Local Machine**.

Section 1

1. Open the ACT! For Windows database that you wish to convert
2. Make sure you write down the file name and path of the Database for use later in the conversion process.
3. Select the following: FILE > ADMINISTRATION > DATABASE MAINTENANCE.

Note: Please read the ACT! For Windows explanations carefully before choosing the type of maintenance and proceeding.

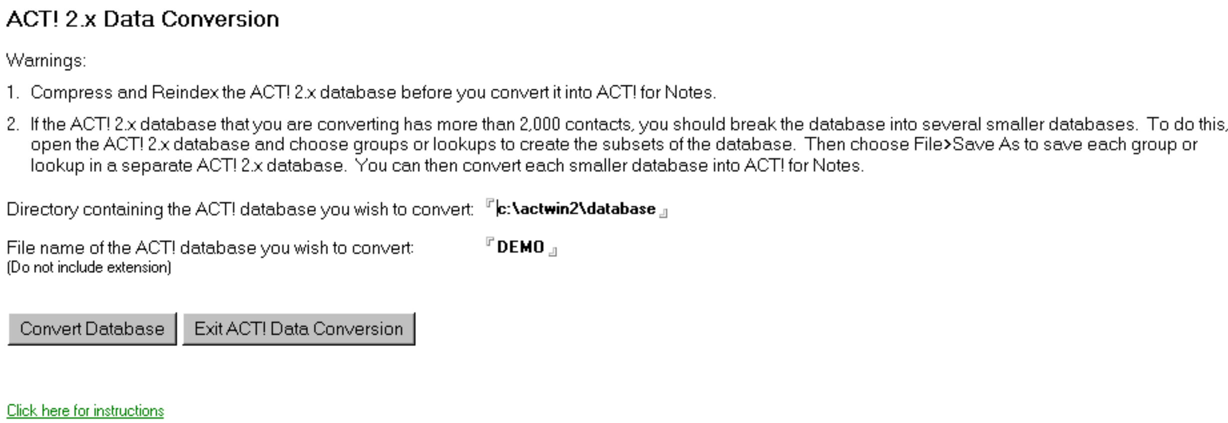
4. Once you have chosen the type of maintenance, click on the Reindex button.

Section 2

- **Note:** Before beginning the conversion process open the blank ACT! For Notes database and create User Documents for all people who will be using the database.

1. Open the ACT! For Notes database select the following from the drop down menu: CREATE > DATA CONVERSION > 2. CONVERT FROM ACT! 2. X.
   - **Note:** Database does not have to be blank. This conversion will simply add to the number of documents that already exist in your ACT! For Notes database.

Once selected the following dialog box will display:



2. In the 'Directory containing the ACT! database you wish to convert' field, you will type the file location. For this example this ACT! For Windows database is located in **C:\actwin\database**

- **Note:** Please do not type the file name into the first field, just the file location.

3. In the 'File name of the ACT! Database you wish to convert' field, enter just the name of the file. This file is located in the same string that you had typed in the "Directory containing" field in the previous instructions.

- **Note:** Be sure when entering the file name just enter it as you see it. Under no circumstances will you need to enter in a file extension. For this example the ACT! For Windows database file name is **DEMO.**

4. Click on the Convert Database button. This will begin the process of Data Conversion; a message will display informing you that the converted data will be appended to the ACT! For Notes Database, when prompted click **OK** the progression bar will display showing the conversion rate.

5. A message will display telling you that the Data Conversion is complete, click ok. Choose the Exit ACT! Data Conversion button. A message will display asking you to Set Manager and Access for new document, click OK and you will be in your new ACT! For Notes database.

- **Note:** You may need to click Refresh or F9 to see your new documents.

Section 3

Once Data Conversion is complete you must make sure that the data that you have just converted is consistent. You must first Set Manager and Access and then Synchronize Data.

- **Note:** Please reference Chapter 5 for instructions on how to 'Set Manager and Access' and 'Synchronize Data'.

ACT! For Windows contains only Contact documents, while ACT! For Notes contains both Contact and Company Documents. When you convert data into ACT! For Notes from ACT! For Windows, you will need to create company documents.

Select one Contact from each Company.
Click on the Company action button then select "Create Multiple Company Documents".

Note: This feature will allow you to create Company Documents from the Contact List. The information that is inherited comes from the Contact. The information that can inherit can be viewed/edited from the preferences document under the "Inheritance" tab.

The final step would be to select all contact documents, select the Contact action button, and select Link Contact to Company. You will be presented with two options, select 'Link Contacts to Companies of the Same Name'.

Converting an ACT! for Windows 3.x, 4.x or 2000 Database

Before you convert your ACT! for Windows 3.x (which must be version 3.06 or higher), 4.x or 2000 database, perform the synchronization and re-indexing tasks described under " Converting an ACT! for Windows 2.x Database".

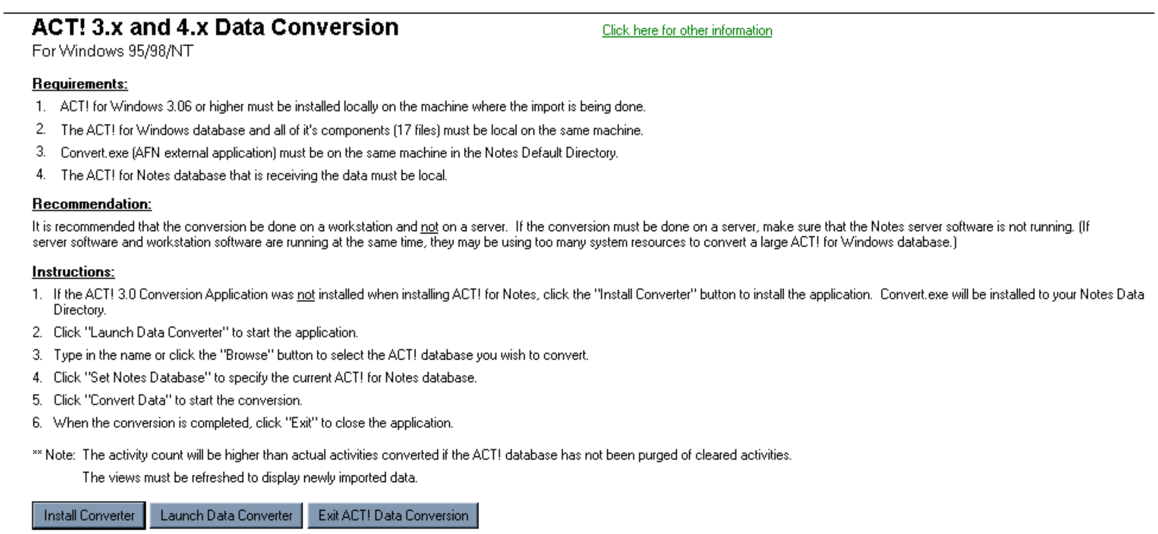
If your ACT! for Windows 3.x, 4.x or 2000 database contains more than 10,000 contacts, you will need to split it into smaller databases after compressing and re-indexing.

To convert an ACT! for Windows 3.x, 4.x or 2000 database:

1. Create a local replica of the ACT! For Notes server database which you want append the converted data.

2. From the Create menu, choose DATA CONVERSION>CONVERT FROM ACT! 3.X AND 4.X.

The ACT! Data Conversion document displays.


ACT! 3.x and 4.x Data Conversion Click here for other information
For Windows 95/98/NT

Requirements:
1. ACT! for Windows 3.06 or higher must be installed locally on the machine where the import is being done.
2. The ACT! for Windows database and all of it's components (17 files) must be local on the same machine.
3. Convert.exe (AFN external application) must be on the same machine in the Notes Default Directory.
4. The ACT! for Notes database that is receiving the data must be local.

Recommendation:
It is recommended that the conversion be done on a workstation and not on a server. If the conversion must be done on a server, make sure that the Notes server software is not running. (If server software and workstation software are running at the same time, they may be using too many system resources to convert a large ACT! for Windows database.)

Instructions:
1. If the ACT! 3.0 Conversion Application was not installed when installing ACT! for Notes, click the "Install Converter" button to install the application. Convert.exe will be installed to your Notes Data Directory.
2. Click "Launch Data Converter" to start the application.
3. Type in the name or click the "Browse" button to select the ACT! database you wish to convert.
4. Click "Set Notes Database" to specify the current ACT! for Notes database.
5. Click "Convert Data" to start the conversion.
6. When the conversion is completed, click "Exit" to close the application.

** Note: The activity count will be higher than actual activities converted if the ACT! database has not been purged of cleared activities.
The views must be refreshed to display newly imported data.

Install Converter | Launch Data Converter | Exit ACT! Data Conversion

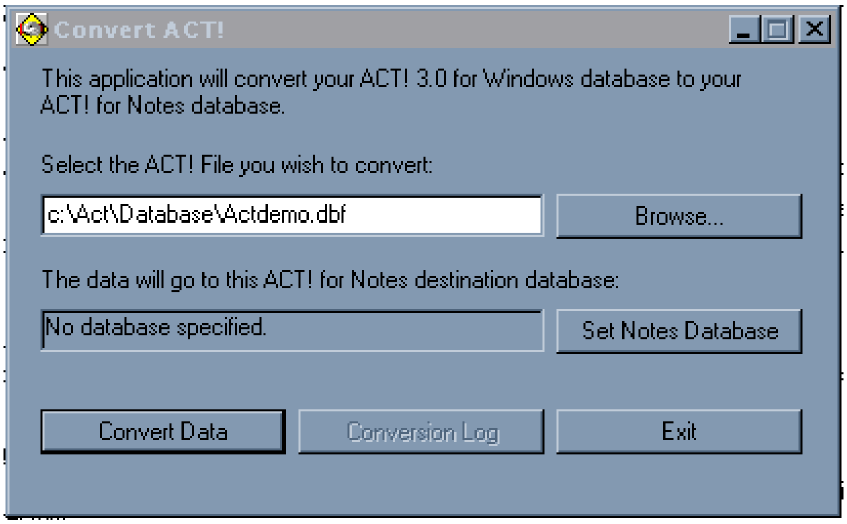
3. There are several requirements for conversion from ACT! for Windows 3.x, 4.x or 2000:

- The ACT! for Windows and ACT! For Notes databases must be on the same local hard disk.

- You must have installed the conversion utility. By default, it installs when you install ACT! For Notes. If you did not install the utility, click the Install Converter button on the Data Conversion document. You will need your ACT! For Notes installation CD. If Convert.exe already exists, overwrite it, so that you have the most current version of the converter.

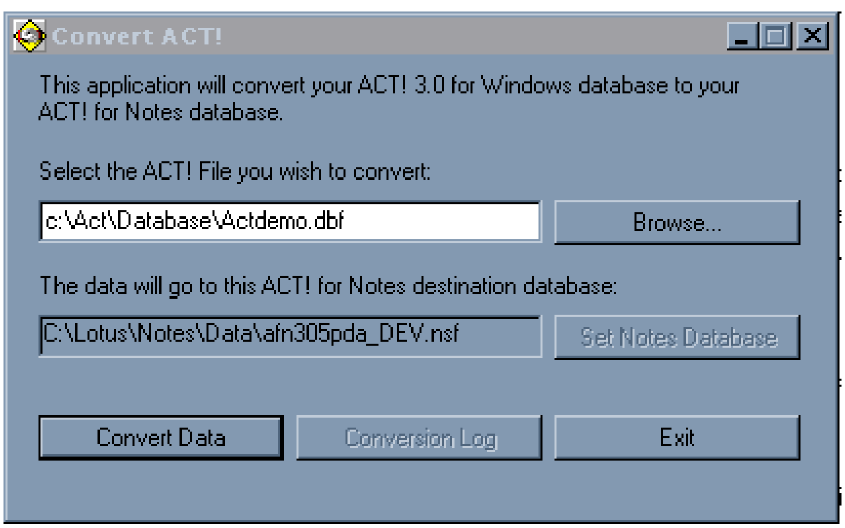
4. Click the launch Data Converter button once the above requirements are met.

The converter dialog box displays:



5. The default name for the ACT! for Windows 3.x, 4.x or 2000 database file will be in the 'Select ACT! file to Convert" area. Change this if it is incorrect or click Browse to search your hard drive for the database. You should always choose the file with the DBF file extension.

6. Click " Set Notes Database" to specify the currently open ACT! For Notes database:



5. Click "Convert Data" to start conversion.

6. If your ACT! for Windows database is in separate pieces, repeat steps 5-7 until complete.

7. Click "Exit ACT! Data Conversion" to close the conversion application once the conversion is complete.

8. Refresh your views in ACT! For Notes to view imported data.

Alert: After you convert an ACT! for Windows 3.x, 4.x or 2000 database, the manager field needs to be updated so that security works properly. You can use the Set Manager and Access feature in the Other action button to select a new manager for the selected contact documents.

ACT! For Windows contains only Contact documents, while ACT! For Notes contains both Contact and Company Documents. When you convert data into ACT! For Notes from ACT! For Windows, you will need to create company documents. Groups are imported into the Categories field of the ACT! for Notes Contact documents.

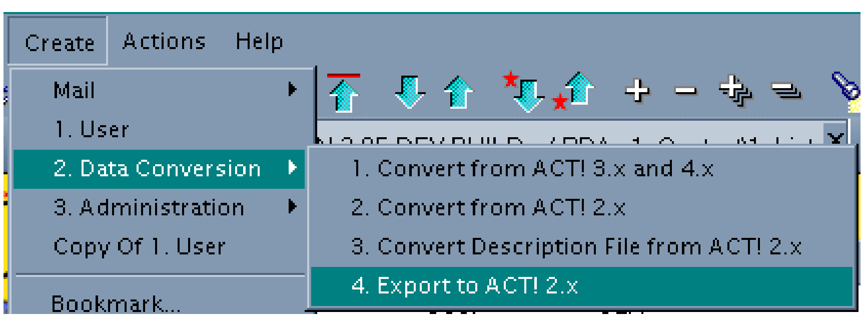
Select one Contact from each Company.
Click on the Company action button then select "Create Multiple Company Documents".

Note: This feature will allow you to create Company Documents from the Contact List. The information that is inherited comes from the Contact. The information that can inherit can be viewed/edited from the preferences document under the "Inheritance" tab. This feature does not check for duplicates, so if several Contacts belong to the same company, that many company records will be created. You will need to remove the extras.

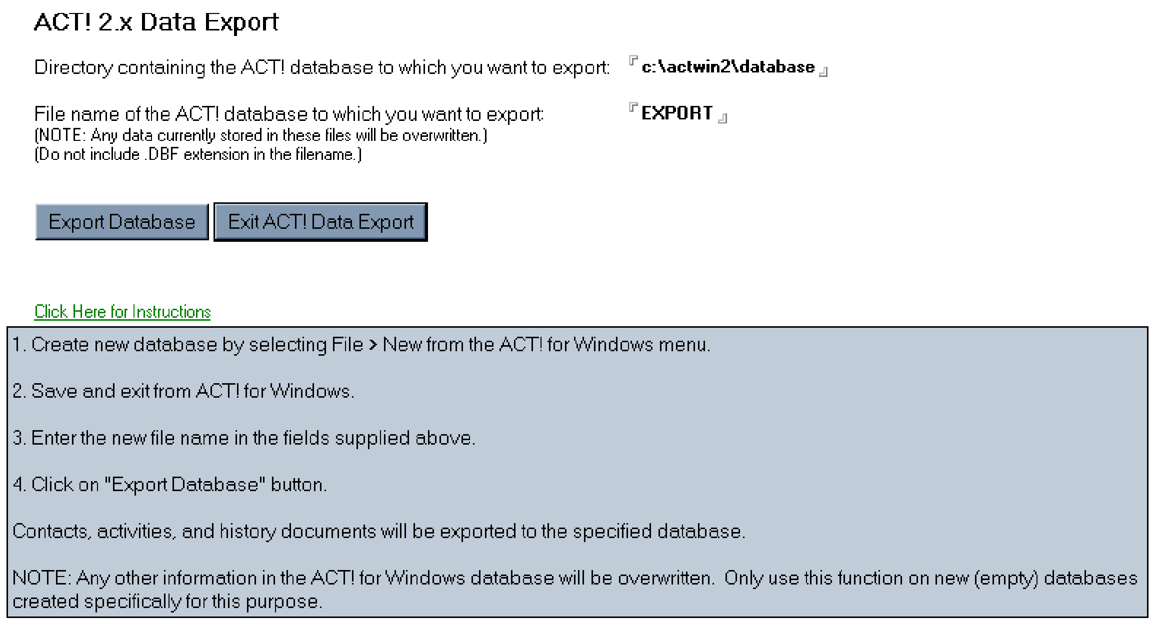
The final step would be to select all contact documents, select the Contact action button, and select Link Contact to Company. You will be presented with two options, select 'Link Contacts to Companies of the Same Name'.

Exporting ACT! For Notes to an ACT! For Windows 2.X Database

Open the ACT! For Notes database select the following from the drop down menu: Create\ Data Conversion\ 4. Export to ACT! 2.X



Once selected the following page will display:
By left-clicking and holding the mouse on Click here for Instructions, the instructions will display.



1. In the first field, type the directory that contains the database that you want to export.
2. In the second field, type the file name of the database to which you want to export. Do not include the file extension.
3. Click the Export Database button. A progress gauge displays indicating the progress of the export.
4. Click the Exit ACT! Data Export button after the export is completed to re-index the new data.

Field Maps

The following table provides a field map between the contact documents in ACT! For Notes and ACT! for Windows 3.x, 4.x or 2000. The activity, history, and notes documents map directly from field to field, using similar names and formats.

The values in the tables are actual field names and may not match the associated field label in the database. An N/A in the table indicates that the field is not converted or is not required in the ACT! For Notes database. In addition, some ACT! for Windows 3.x, 4.x or 2000 fields are joined to create a new field in ACT! For Notes.

When you convert any ACT! for Windows 3.x, 4.x or 2000 contact, activity, history and notes data that information becomes public in ACT! For Notes.

Contact Field Mapping

ACT! for Windows 3.0.6 or later Fields	ACT! For Notes Fields
CF_Name	Contact
CF_Company	Company
CF_Create Timestamp	CreateDate

CF_EditTimestamp	EditDate
CF_Creator	Manager
CF_Creator	Creator
CF_Address1	Address1
CF_Address2	Address2
CF_Address3	Address3
CF_City	City
CF_State	State
CF_Zip	Zip
CF_Country	Country
CF_IDStatus	Status
Parsed from CF_Phone	CountryCode
CF_Phone	Phone
CF_Fax	Fax
CF_HomePhone	HomePhone
CF_MobilePhone	MobilePhone
CF_Pager	PagerPhone
CF_Salutation	Salutation
CF_Title	Title
CF_Assistant	Assistant
CF_LastResults	LastResults
CF_ReferredBy	ReferredBy
CF_User1	User1
CF_User2	User2
CF_User3	User3
CF_User4	User4
CF_User5	User5
CF_User6	User6
CF_User7	User7
CF_User8	User8
CF_User9	User9
CF_User10	User10
CF_User11	User11
CF_User12	User12
CF_User13	User13
CF_User14	User14
CF_User15	User15
CF_AltAddress1	AltAddress1
CF_AltAddress2	AltAddress2
CF_AltCity	AltCity
CF_AltState	AltState
CF_AltZip	AltZip
CF_AltCountry	AltCountry
CF_AltPhone	OtherPhone
CF_Name2	Asst2
CF_Phone2	Asst2Phone
CF_FirstName	FirstName
CF_LastName	LastName

CF_Ext	Ext
CF_AsstPhone	AssistPhone
CVF_EmailAddress	Email
GF_Name (Group Names)	Categories

Activity Field Mapping

ACT! for Windows 3.0.6 or later Fields	ACT! For Notes Fields
AF_CreateTimestamp	CreateDate
AF_EditTimestamp	EditDate
AF_Type	Categories
AF_Priority	Priority
AF_Regarding	Regarding
AF_StartTime	Date
AF_StartTime	Time
AF_StartTime	CalendarDateTime
AF_StartTime	StartDateTime
AF_StartTime + AF_Duration	EndDateTime
calculated from AF_Duration	Duration
calculated from AF_Duration	DurationType
AF_LeadTime	LeadTime
Recurring Activity Information	Text

Notes-History Field Mapping

ACT! for Windows 3.0.6 or later Fields	ACT! For Notes Fields
NHF_CreateTimestamp	CreateDate
NHF_EditTimestamp	EditDate
NHF_Type	Categories
NHF_Text	Regarding
NHF_UserTime	Date
NHF_UserTime	StartDateTime (cleared activities)
NHF_RecordedTime	Time (cleared activities)
NHF_Attachment	Attachments

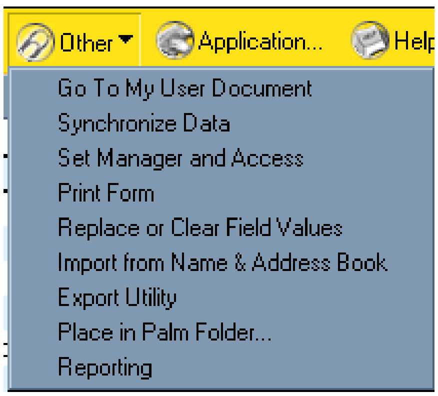
NOTE: ACT! for Windows stores attachments as pointers to a file. If the file exists in the stored path, the attachment is created as an embedded object in the note, otherwise only the path name is stored.

Chapter 4: Managing Your Data

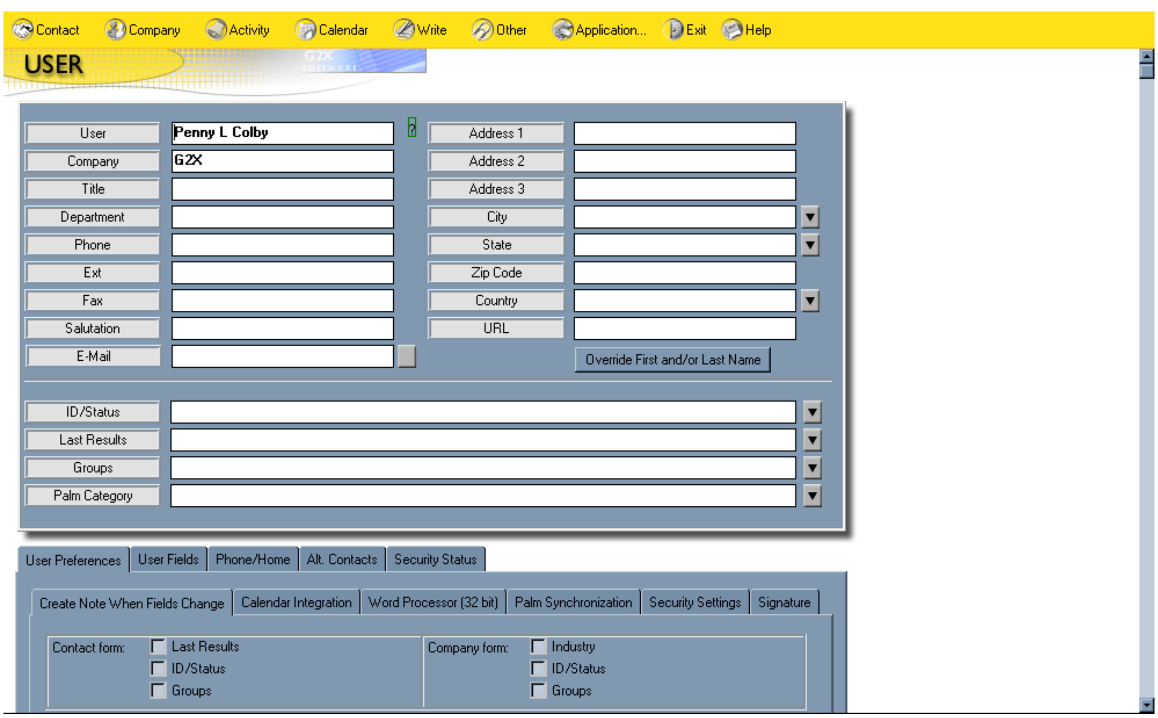
Go To My User Document

User documents are required for every person who will be using ACT! For Notes in your organization. Normally, your ACT! For Notes Administrator creates these documents in advance.

To view your own User Document, click on the Other action button and select Go To My User Document.



Your User Document displays.



Edit the document by pressing the  red pencil button in the tool bar.

Your name appears in the User field. The organization part of the hierarchical name appears in the Company field.

Enter the basic information about you. Title, Phone, Address, City, State, and Zip Code fields, if the fields are not already filled in.

"User preferences" configures the following options for you in the database.

- Create Note when fields Change options for a Contact Form or Company Form determine whether ACT! For Notes creates a note containing the new information when you change one of these fields.

  For example, if the Last Results option is selected for the contact form and you make a change to that field, ACT! For Notes stores the new information from this field in a note. This is only true for contact and company documents in which the user is the document manager.

  Check the boxes for the fields on which you want these notes created.

- The Calendar Integration fields cause ACT! For Notes to interact with your Lotus Notes mail file and calendars. Such that the ACT! For Notes calendar and the mail file calendar remain consistent and ACT! For Notes invitations are sent to your mail file when activities are scheduled for you.

  Your administrator must have upgraded the design of your mail file database and selected the correct Calendar Profile options for this to work completely.
  Check both boxes in this area if you want to enable Calendar Integration, if they are not already selected.

- The NAB Integration feature allows you to enable Synchronization between ACT! For Notes and your Personal Name and Address book (NAB), so that you may choose to synchronize your personal NAB with your PDA device.
  - First, identify the filename and path of your personal name and address book, either by typing in the value or by clicking 'Choose NAB' to browse for it.
  - Second, determine whether you are using a standard Lotus Notes designed address book or if any customizations have been made to the address book you are using.

  With the 'AFN changes Overwrites NAB changes' selected, HotSync manager will distinguish changes between ACT! For Notes and your NAB and give ACT! For Notes the priority to overwrite the Data in the NAB.

  With the 'NAB changes overwrites AFN changes' selected, HotSync manager will distinguish changes between ACT! For Notes and your NAB and give your NAB the priority to overwrite the Data in ACT! For Notes.

  With the 'Don't synchronize changes' selected, HotSync manager will NOT distinguish any changes between ACT! For Notes and your NAB and the Data will remain intact in both the NAB and ACT! For Notes.

- The Word Processor (32-bit) feature allows you to select the type of word processor used for creating Word Processor Documents. The selected Word Processor will automatically launch when a Word Processor Document is created.

  ACT! For Notes work with the following (32 bit) word processors: Lotus Word Pro, Microsoft Word and Corel Word Perfect.

- The Security Settings feature allows you to set default security status on documents the user creates.

- Determine if the document is a public or private document.
- Select the document manager.
- Determine which users have read/write access to a document.
- Select the group for which the user should belong. These user groups are used for scheduling activities, as well as document security.

Note: See Appendix A for additional information regarding document security.

- The **Signature** feature allows you to attach a piece of text, an image, or an HTML file to append copyright message or personal matter when using e-mail.

Save the document by clicking the Exit action button.

Synchronize Data

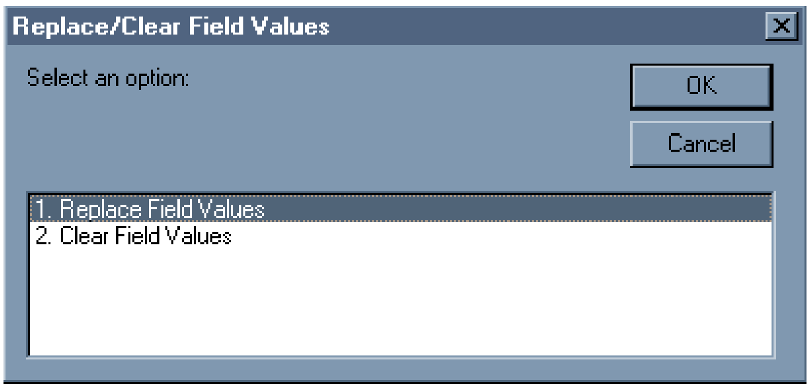
Anytime any of the information for a Contact or Company document changes you have the option to also change all of the response documents. Select the main document (Contact or Company) click the twisty down and select the response documents (notes, activities, etc.) under it. Choose the Other action button, and select Synchronize Data. Any inherited information that you changed on the main document (Contact or Company) will now change in the response documents (anything under the twisty).

Print Form

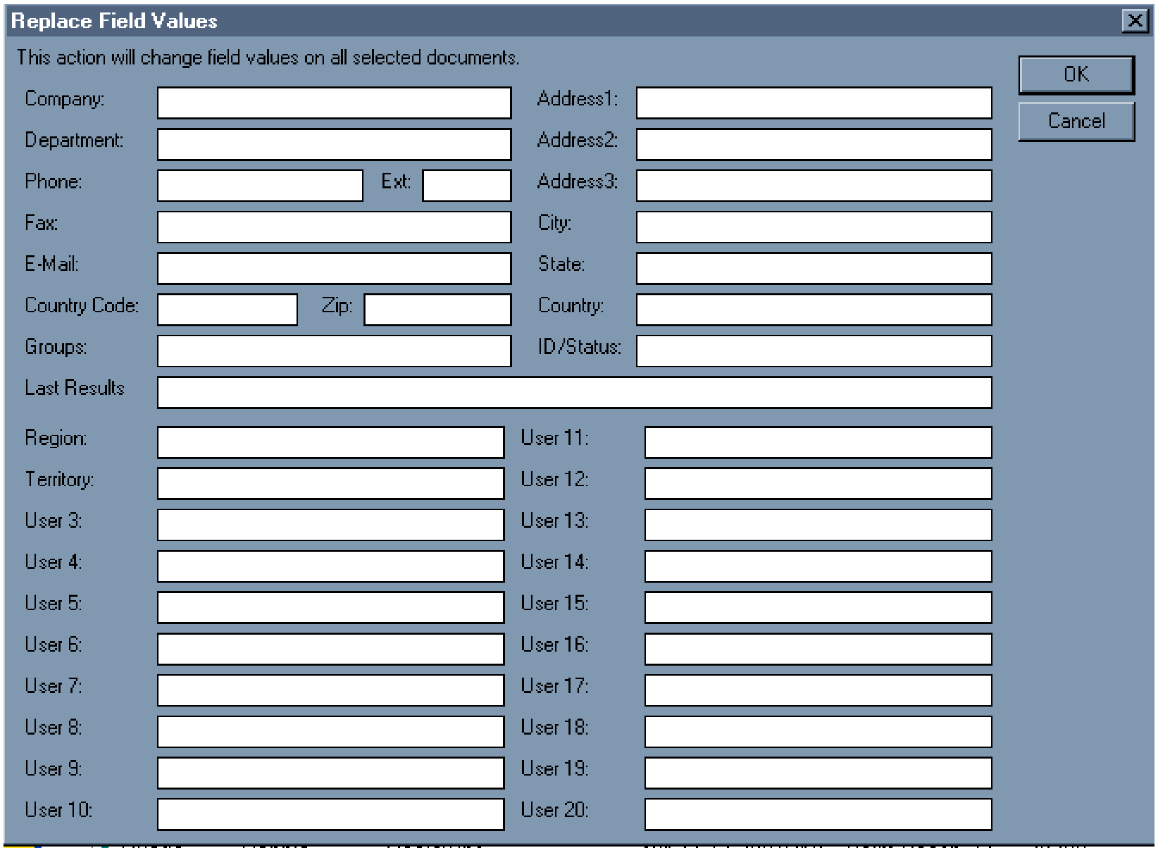
This feature will simply allow you to print the whole form,(Main Documents and Response Documents) it will open up all the tabs so that you may print the whole form and not just what's in the view.

Replace or Clear Field Values

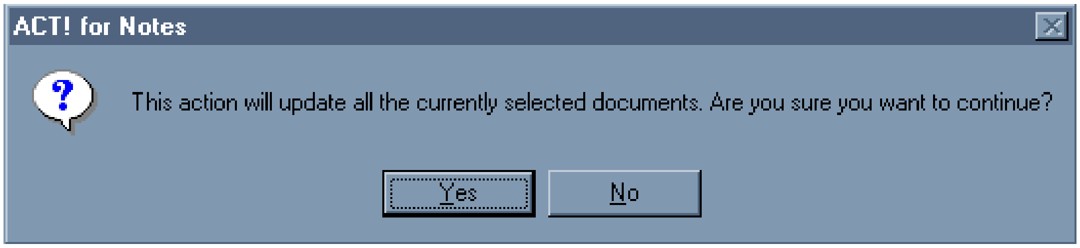
This feature also found under the Other action button allows you to change information on multiple documents for the same fields. You would select the documents that you would like to change and then click the Other action button and choose to Replace Field Values or Clear Field Values.



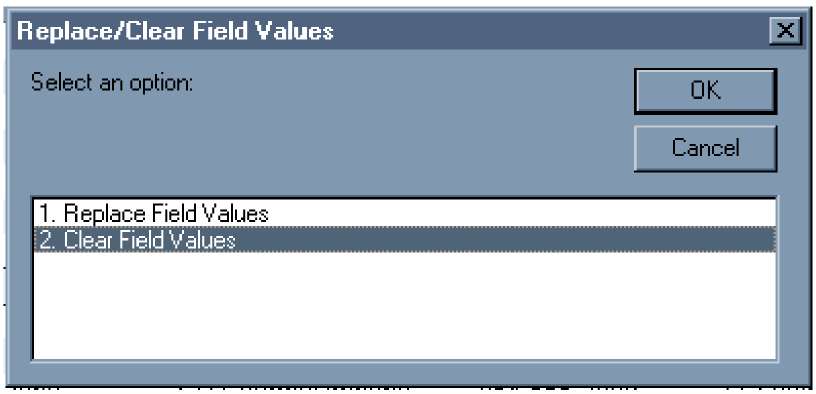
If you select Replace Field Values you will see the following form appear. You will need to fill in the fields that you want to change for all of your documents (be careful because this will change the fields on all the selected documents).


Replace Field Values
This action will change field values on all selected documents.
OK
Cancel
Company:
Department:
Phone:
Ext:
Fax:
E-Mail:
Country Code:
Zip:
Groups:
Last Results
Address1:
Address2:
Address3:
City:
State:
Country:
ID/Status:
Region:
Territory:
User 3:
User 4:
User 5:
User 6:
User 7:
User 8:
User 9:
User 10:
User 11:
User 12:
User 13:
User 14:
User 15:
User 16:
User 17:
User 18:
User 19:
User 20:

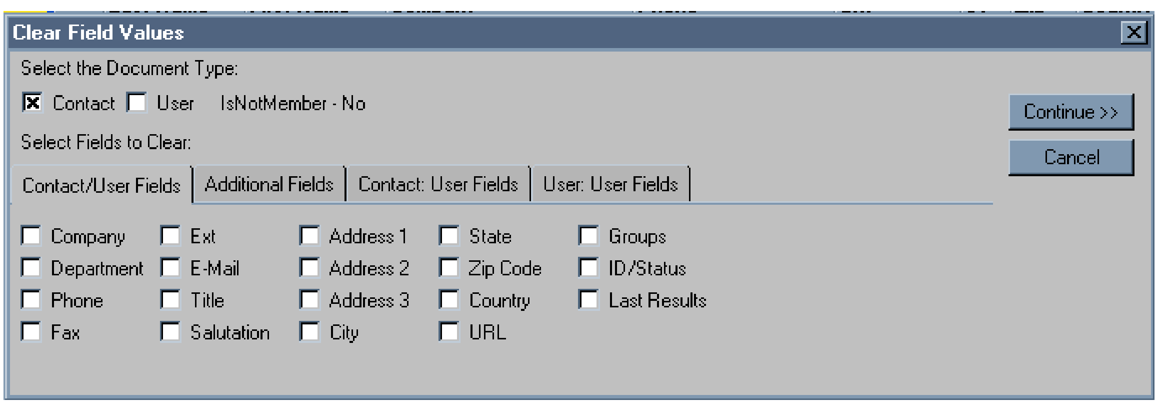
When you select OK, it will prompt you to make sure that you do want to update all the currently selected documents.



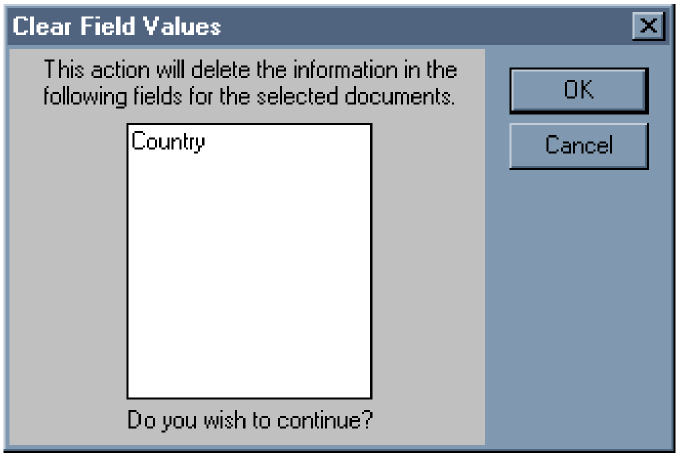
If you select Clear Field Values in the dialog box.



You will see this form, so that you may select the fields you would like to clear on the documents you selected.



When you choose Continue it will prompt you to make sure you have the appropriate fields selected to clear.

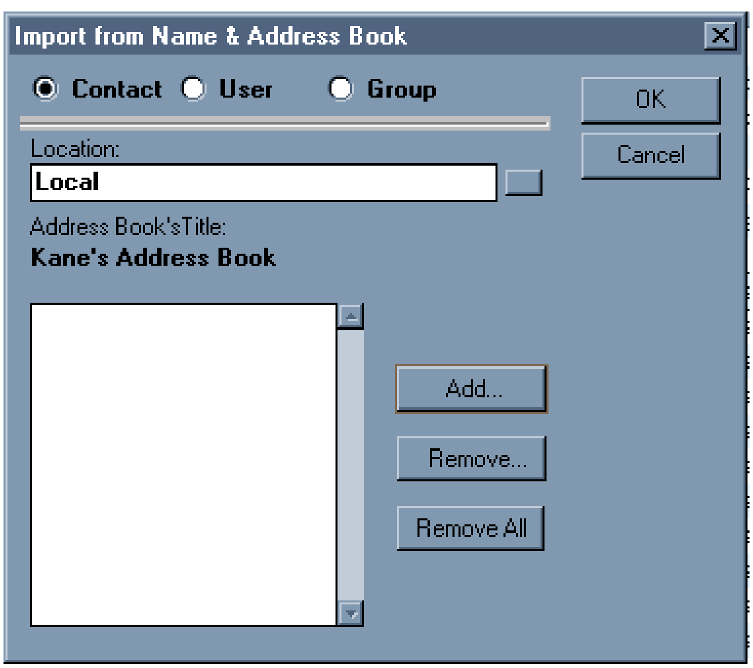


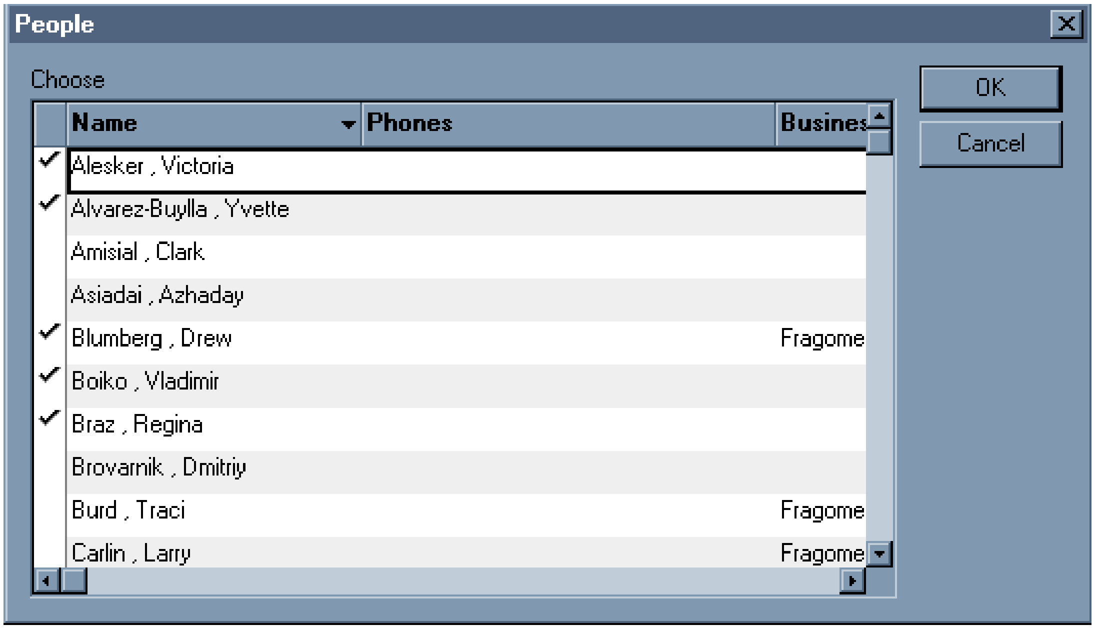
Click OK and the fields you selected will be blank.

Import from Name & Address Book

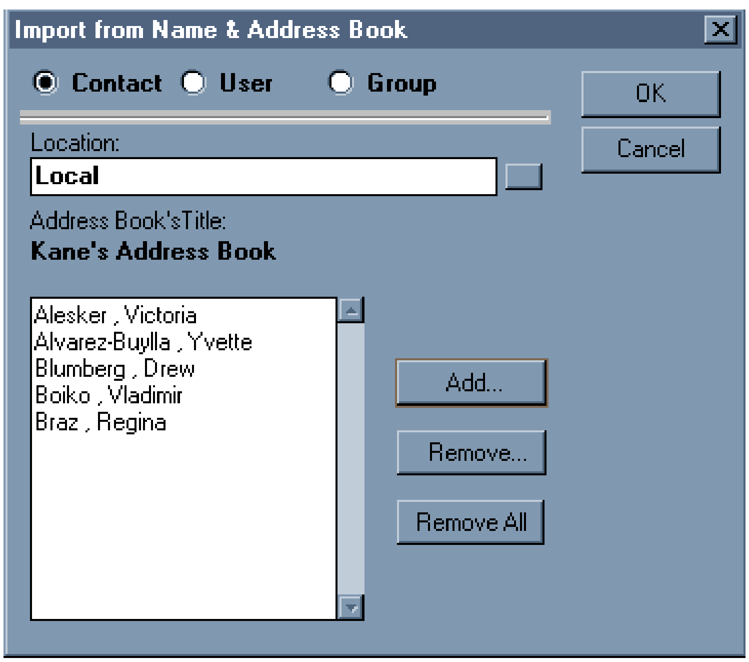
Import from Name and Address Book allows you to bring in Contacts from your personal Name and Address Book. To do this, click the Other action button and choose Import from Name & Address Book. You will see the following dialog box. Choose the Add button, to open your personal address book in order to select those contacts to add to ACT! For Notes.

Alert: Although you can bring Users and Groups from the Name and Address Book, you can only do so using a Public name and address book, since those names are later used for security purposes. If you try to import a user or a group from the local address book, you will get an error message and the import will be automatically reset to Contact.





You will see the Contact(s) names that you selected. If they are correct, click OK.



You will now see these Contact name(s) appear in the Contact List view.

Last Name	First Name	Company	Phone	City	St	Zip	Country
Actman	David	Cordoba Coffee Shops	212-555-1000	New York	NY	10001	
Aguilar	James	Decisions, Inc.	716-555-1509	Rochester	NY	14653	
Albright	John	L.B.Foster Inc.	412-928-4556 x4876	Pittsburgh	PA	07789	
Alesker	Victoria						
Alvarez-Buyll	Yvette						
Anderson	Ernst	CH Gourmet Imports	954-555-2000	Ft. Lauderdal	FL	90876	
Anderson	Gunther	CH Gourmet Imports	954-555-2000	Ft. Lauderdal	FL	90876	
Barrymore	Drew	Bon Bon Ind.	310-966-3900 x310	Los Angeles	CA	90005	
Bencsics	Bob	IBM Inc.	897-908-7890 x8990	Honolulu	HI	45678	
Beyer	Bob	Century 21	212-555-2890	New York	NY	10010	
Big	Really Really	Big Company; The	301-555-1111 x678	New York	NY	89076	United States
Big	Robert	Big Company; The	301-555-1111 x570	New York	NY	10010	United States
Bloggs	Joe	Berkshire Fine Teas, Ltd.	01234 567890	Maidenhead	Berk:	AB1 2(	England
Blumberg	Drew	Fragomen					
Bodell	Sandy	Astrup Company; The	401-555-5555 x500	Pawtucket	RI	02245	
Boiko	Vladimir						
Bouvier	Danese	Kwik-e-mart	415-555-3322 x356	Los Angeles	CA	98765	United States
Bowman	Carl	Cordoba Coffee Shops	212-555-1000	New York	NY	10001	United States
Braz	Regina	G2X Inc.		Tinton Falls	NJ	07724	
Braz	Regina						

Export Utility

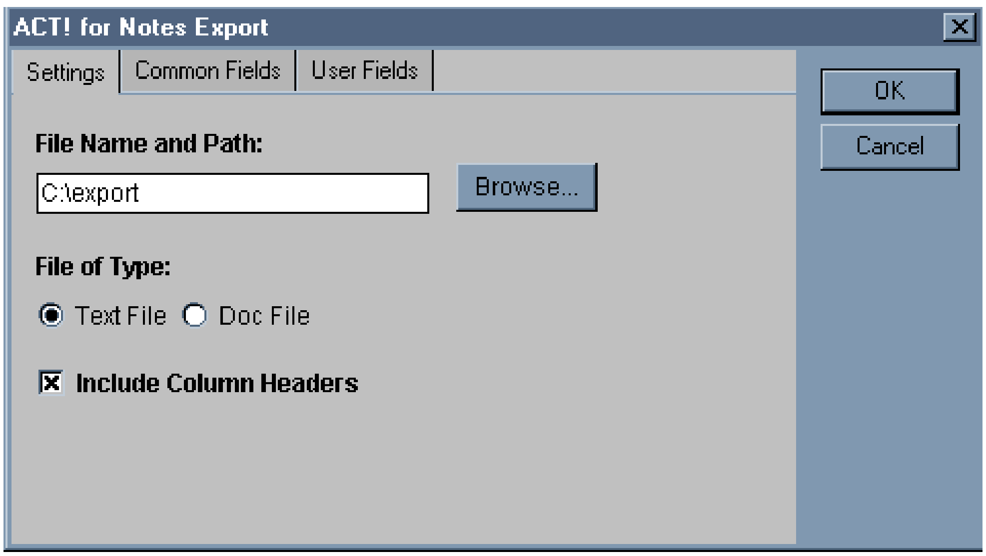
Export Utility provides a tool to export ACT! For Notes information into a text or document file.

Note: This action will not remove information from ACT! For Notes, it will simply copy information out.

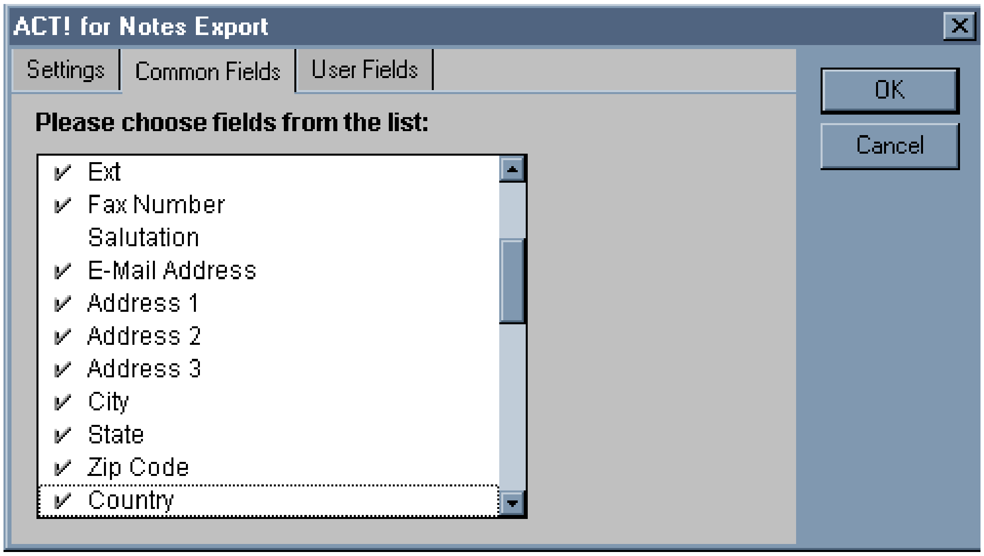
Select the Contacts that you would like specific information Exported, click the Other action button and choose Export Utility.

You will see this dialog box with three tabs. The first tab is the Settings, this allows you to setup your new document by:

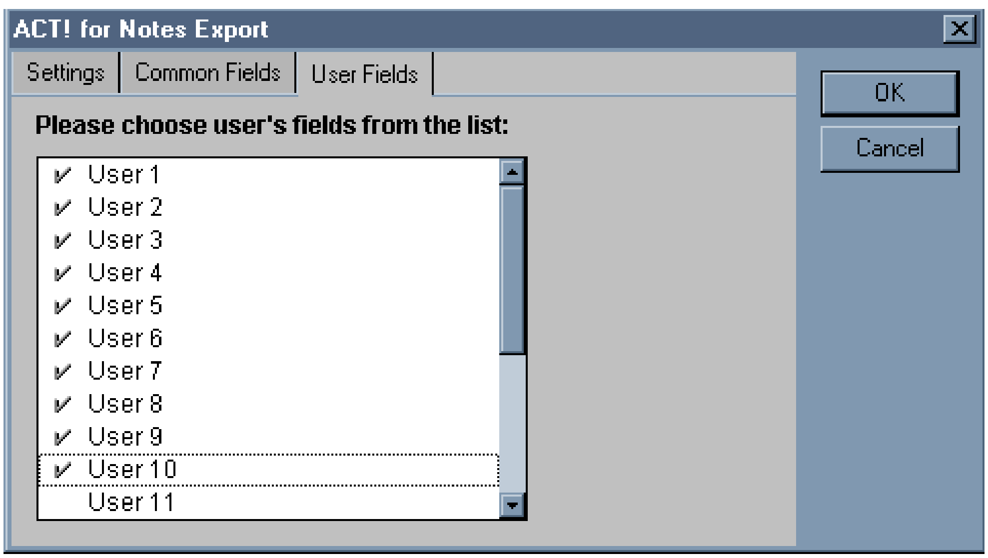
Define the file name and path
Determine the file type, and
Choose to include Column Headers or not.



The next tab Common Fields allows you to select the fields that you would like in your export, you do this by choosing the field in the left margin.



The User Fields tab allows you to select the User Fields that you would like to include in your export.



Choose OK when you are finished with your selections.

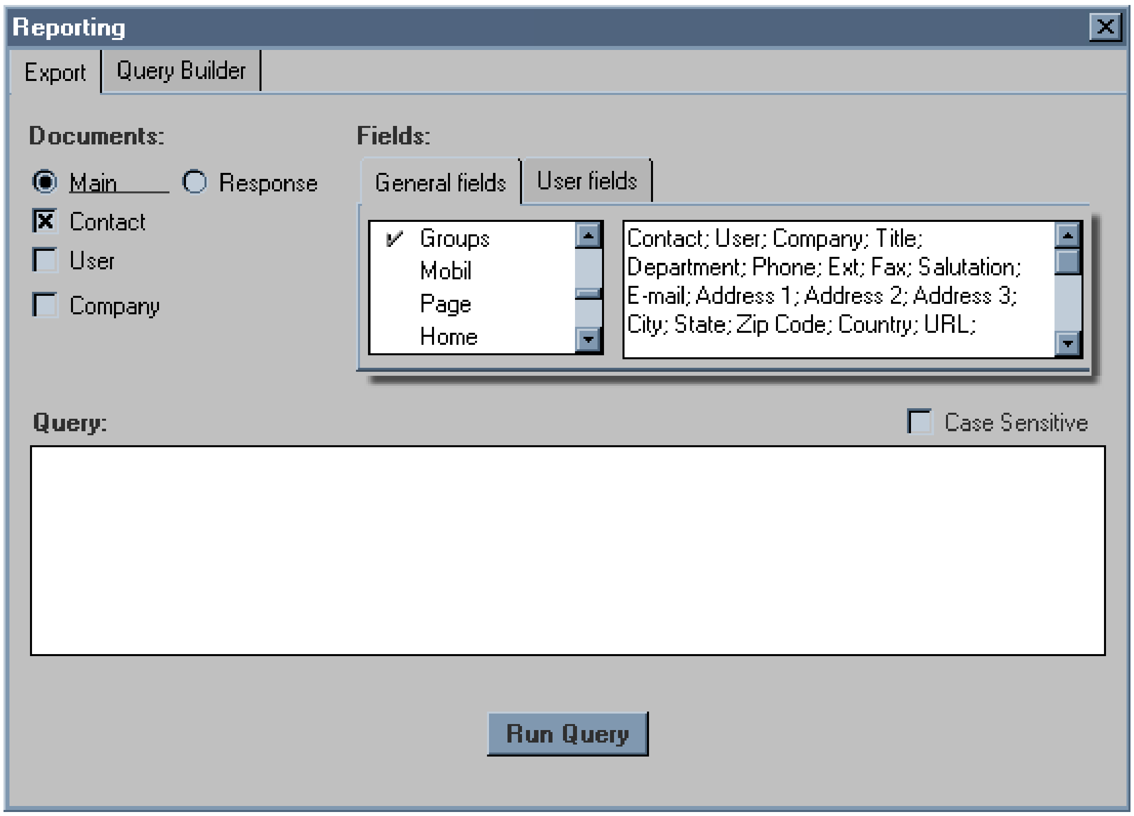
A file will automatically be created based on the information you provided on the Settings tab. You now need to go open it in the application you selected.

Note: You can easily open a text file in any spreadsheet application.

Reporting

Reporting provides a tool to query ACT! For Notes information and export it into a spreadsheet file. It has a Query Builder dialog to make it easier to create/update a search query and stores the query in ACT! For Notes. All documents meeting the search criteria are exported along with the column headers.

Select the Other action button, and choose Reporting. The Reporting dialog box appears.

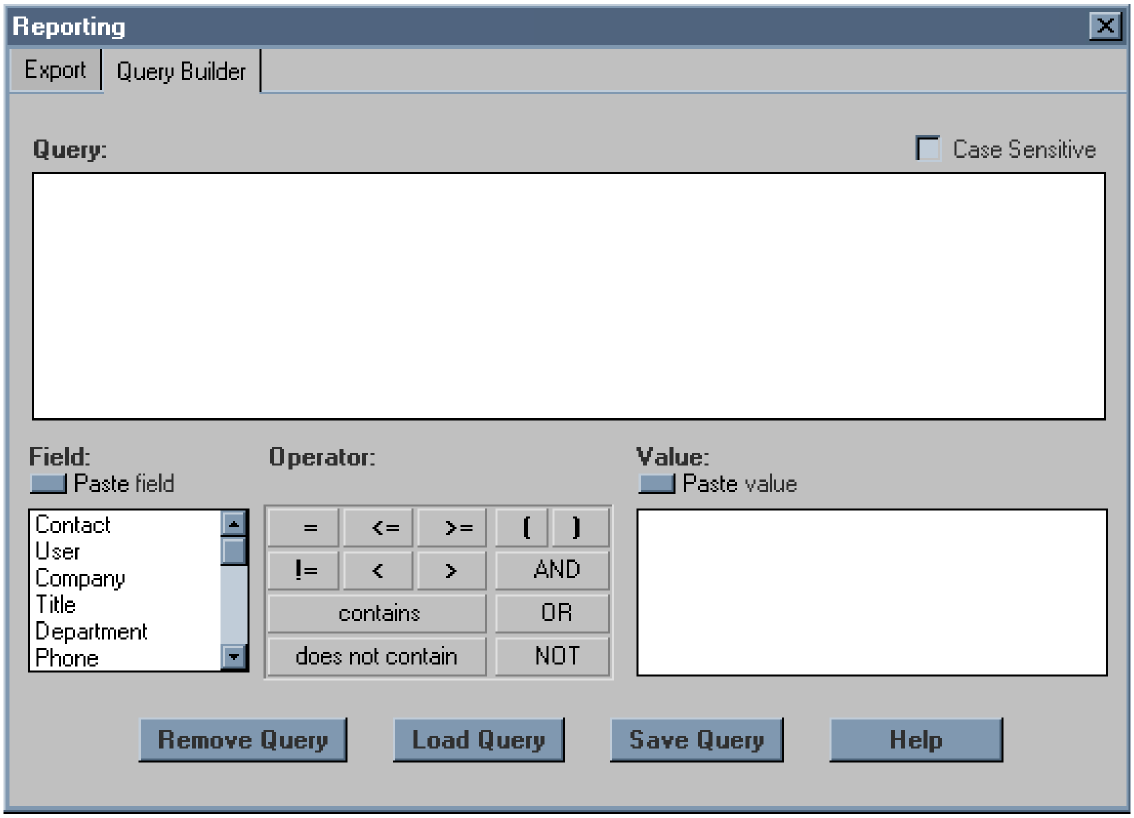


Select Main or Response documents to export to your spreadsheet file.

Check the type of documents that you want to export (Contact, User or Company).

Select the fields that you want to export.

Building the Query. After selecting the fields you would like included in your report, select the Query Builder tab.



We are interested in searching our database to determine which Contacts in the New York State area have a title of President. We will build a query by inputting this information.

Operators Legend:

=	equal	**contains**	Text is part of a field
<=	Less than or equal to	**does not contain**	Text is not part of a field
>=	Greater than or equal to	**( )**	Isolate condition
!=	Not equal to	**AND**	Multiple conditions must be true
<	Less than	**OR**	Only one of multiple conditions must be true
>	Greater than	**NOT**	Negative condition

Follow these steps to build this Query.

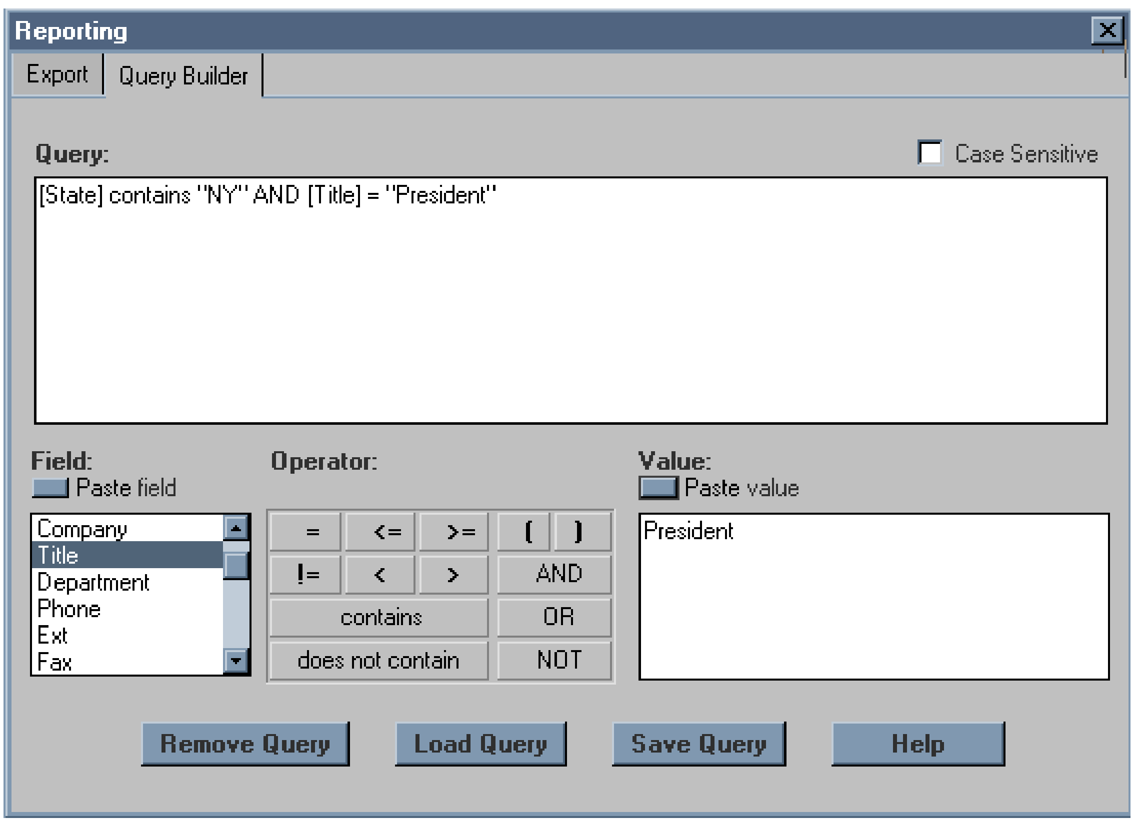
Select the field value from the left box. In our case "State" then choose the "Paste field" button.
In the bottom center, select the appropriate operator. In our case, select contains or =.
In the bottom right, type the field value. In our case, type "NY" then select the "Paste value" button.

Note: This accomplishes the first portion of our search; all contacts in the state of New York.

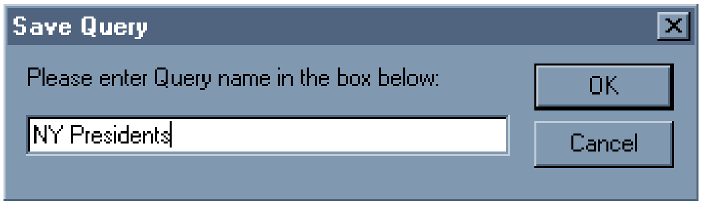
In the operator section, select AND because we want the documents to meet both of these criteria.
Select the "Title" field from the left and choose to "Paste field".
Select operator contains or = President.

Note: Contains operator will allow the search to pick up Vice President as well. = operator will only allow for the exact value of President.

On the bottom right, type the value "President" (this search is not case specific) then choose to "Paste value".



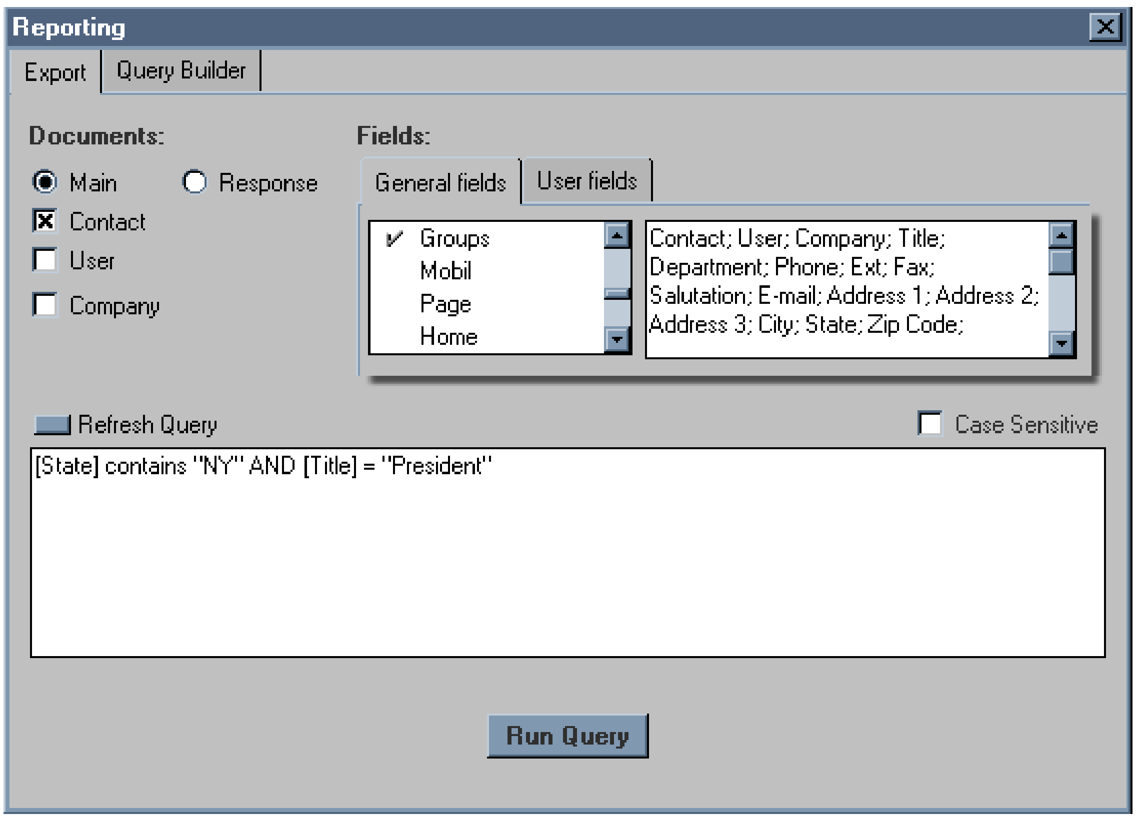
If you would like to save this query, click the Save Query button. A dialog box appears requesting that you name your query. We will name our query NY Presidents.



Load Query will allow you to pull up a previously saved query.

Remove Query will allow you to delete a previously saved query.

Back to the Export tab.



Click on the Run Query button. A spreadsheet file will launch with the results of your query.

Chapter 5: Customizing ACT! For Notes

As an ACT! For Notes administrator, you can customize your Lotus Notes databases for a workgroup's needs. Additionally, if you are an application or database developer, you can change a database's design by viewing and modifying selected pieces of the source or database code. Like many Lotus Notes database applications, ACT! For Notes is customizable in similar ways. You must purchase the source code to perform customizations of this sort.

To customize ACT! For Notes, you should be familiar with Lotus Notes application development. For more information about Lotus Notes application development, see the Lotus Notes' Application Developer's Guide.

This chapter explains which features you can and cannot customize in an ACT! For Notes database. To learn more about customizing an ACT! For Notes database, contact your G2X sales representative for more information.

Note: G2X cannot offer Technical Support on how to customize ACT! For Notes, nor on any ACT! For Notes features which have been customized in any way.

Alert: If you have purchased a version of ACT! for Notes without the source code, it is strongly recommended that you refrain from any type of customizations. Although the code is not visible, it is nevertheless there and any additions will automatically invalidate original functionality.

About Customizing ACT! For Notes

As you install the software, ACT! For Notes is ready to use. However, if you choose, you can modify your ACT! For Notes database. You can change field labels, add fields on forms, change existing form layouts, and customize many other ACT! For Notes features.

All of these changes are possible using Lotus Domino Designer.

Caution: An application developer should exercise caution when customizing ACT! For Notes. Every form has hidden fields, in the user interface, integrated into the products operation. Some fields have values computed based on the values contained in other fields. You cannot tell which fields are computed fields on a form because the formulas are hidden. Therefore, if you remove those fields, you can damage the functionality of the form.

When customizing ACT! For Notes' forms, you should try not to remove the default fields. Some fields, such as user fields, can be removed without damaging the form. However, because you may not be sure which fields can be removed without affecting the functionality of the form, you may not want to delete any fields on the form. Instead of deleting fields from a form, you can hide the fields by using the text properties of the form.

Views have even stricter restrictions than forms. Because @DbLookup, @DbColumn, and @PickList functions use views and extract data based on the position of the column in a view, you should not insert or delete columns in existing views. You may add views without adversely affecting existing programming; however, views are physical structures and adding new views can add to the database size, which could affect performance.
As you become familiar with ACT! For Notes, you may want to extend its functionality or modify it for your needs. The next section explains which features you can customize.

Ways to Customize ACT! For Notes

In ACT! For Notes, you can change or customize many database features. The following list describes the ACT! For Notes features that you can customize and contains some examples explaining how to customize those features.

- Add new views. You can add personal or shared views. Remember that adding new views can increase the database size and consequently affect database performance.
- Add new forms. For example, you can add a response document to the Contact form so users can track a project and have fields inherited. To view the requests that you are tracking, you can build a new view that displays the projects.
- Add public and private folders. Folders allow users to group documents and decide who can view them. For more information about creating folders, see Lotus Notes documentation.
- Add action buttons to the Action Bar. Throughout ACT! For Notes, the Action Bar contains certain buttons, depending on which form is displayed. If you want, you can add buttons to the Action Bar. For example, you could place an action on a Company form to create an opportunity manager application.
- Add public or private agents to look up, automate, verify, or update contact information. For more information, see Lotus Notes documentation.
- Build a link between ACT! For Notes documents and documents in other Lotus Notes applications. For example, you can fill in contact names in an opportunity manager application. For more information about linking ACT! For Notes to another Lotus Notes database, see the document Customizing ACT! For Notes on the ACT! For Notes CD-ROM.
- Extract ACT! For Notes data using the @DbLookup function and use the data for lead tracking or sales forecasting.

Features You Cannot Customize

Although ACT! For Notes is customizable changing certain features in the design can cause problems. For best result, follow these guidelines:

Do not add too many views. Adding too many views can affect the database and degrade ACT! For Notes performance.

Do not modify columns where formulas exist. If you change a formula and you want to restore it, restoring the original formula can be difficult or impossible.

Do not delete any existing ACT! For Notes forms.

Do not delete any views whether hidden or not. You can tell a view is hidden if its name has parentheses around it in the Views Design List.

Do not delete shared fields.

Do not delete existing subforms, which can affect security and database performance.

Do not remove default buttons on the Action Bar.

Chapter 6: Setting Up PDA Synchronization

These guidelines will outline the process needed for synchronization to occur between ACT! For Notes Activity and Contact documents and the Appointment records in a standard Notes Mail file and a Notes Address Book, independent of what Third Party solution you have installed as long as the current conduit has the capability of synchronizing Notes Mail Appointments with a PDA and Contact documents in your Name and Address Book, then ACT! For Notes Activity and Contact documents may be synchronized by way of that functionality.

Activity/Calendar Synchronization

Low-Level Calendar integration provides an automatic one directional *push* from ACT! For Notes to the Notes Mail file. It requires the User to choose the Activity action button and then Pull Mail File Calendar Changes in order to retrieve changes to ACT! For Notes from the Notes Mail File.

1. Set up Low-Level Calendar integration for each user who would like to synchronize activities in ACT! For Notes with their PDA, by applying the ACT! For Notes Standard Mail Template to their mail file.
2. Create a User document for the person, ensuring to select in the Calendar Integration section, Synchronize Calendar with my mail file and Email Invitations to my mail file.

This template adds two hidden views to the mail file ActivityID and PullMailFileCalendarChanges, to make the process faster and more efficient. ACT! For Notes finds the mail file through the Location document, so ensure that the location document is set up properly.

Any activity created in ACT! For Notes and Scheduled for the User will automatically display on the User's mail file calendar. Once synchronization with the PDA has occurred, all new activities created in the PDA and mail file calendar can be placed in ACT! For Notes by going to ACT! For Notes and choosing ACTIVITY > PULL MAIL FILE CALENDAR CHANGES. The User will be presented with two choices: Selected Documents and Based on Date Criteria.

By Selected documents – if the User chooses this option they will be presented with a List of all Mail file Appointments, where they can select which documents should be synchronized with ACT! For Notes.

Based on Date Criteria – if the User chooses this option they will be presented with an input dialog to select documents Created before or after a certain date.

Contact and Address Book Synchronization

Contacts in ACT! For Notes are synchronized with the Name and Address Book(NAB). Since ACT! For Notes is a collaborative application, users of ACT! For Notes can have individually defined, overlapping lists of contacts to synchronize with their NAB. A simple mechanism using private folders is provided for each user to select and keep updated a list of contacts to synchronize.

1. The Preferences document must be set up to enable PDA synchronization on a database level.
2. The User documents must be set up individual preferences for synchronization. The file path and name of the user's personal address book must be specified here.

A private on first use folder is already set up titled "My PDA Contacts", the name of this folder cannot be changed. Any contacts that the user would like synchronized to their PDA would have to be placed in this folder. In all of the 'Contact' views, there is an action under the Other action button, Place in My PDA Folder.

When the User selects this option, they will be presented with three options: All Contact documents, Selected Documents and Based on Field Values.

All Contact Documents – This action will place all contact documents in ACT! For Notes into the PDA folder.

Selected Documents – This action will place any previously selected contact documents (by placing a checkmark next to the document(s)) into the PDA folder.

Based on Field Values – There are two choices within this option. Based on a Manager's name or Based on a field value on the contact document.

Based on Manager's Name – the User will select a Manager's (from the Security Section) name and all the documents that that person is the Manager of will be placed in the PDA folder.

Based on a field value – the User can set a value for any one of the following fields to be placed in the PDA folder
Contact, Company, Title, Department, Phone Number, Ext, Fax, Salutation, E-Mail, ID/Status, Last Results, Groups, Address 1, Address 2, Address 3, City, State, Zip Code, URL or Country.

Once documents have been placed in the folder, the user will be taken automatically to the PDA folder. They may also choose at any time OTHER > GO TO MY PDA FOLDER. There are three action buttons which will assist with Synchronization: Synchronize, Remove from PDA Folder and Log.

Synchronize – There are two choices within this action button, All documents or Selected documents.

All Documents – this action will synchronize all documents in the PDA folder with the User's NAB.

Selected Documents – this action will synchronize only the previously selected documents (by placing a checkmark next to the document(s)) with the User's NAB.

Remove from PDA Folder – There are three choices available from this action: All Contact Documents, Selected Documents and Based on Field Value (see description above for further information).

Log – This action allows you to view information about synchronization; such as when synchronization occurred, how many documents were synchronized, etc. There are three choices available from this action: View Log, Trim Log and Purge Log.

View Log – Allows the user to view their entire log.

Trim Log – Allows the user to remove all but the last 10 synchronization log entries.

Purge Log – Allows the user to completely remove all synchronization log entries.

Import from NAB

To retrieve new contacts you have created/updated in your PDA, synchronize with the NAB, then follow the Import from NAB process described in Chapter 5 to create them in ACT! For Notes. These new documents will be automatically added to your PDA Folder.

Deletions from the PDA and Address Book are not sent back to ACT! For Notes.

Chapter 7: Accessing ACT! For Notes from a Web Browser

Users can access the ACT! For Notes contact database with a limited feature set from a web browser. Users' Internet login name and password are specified in their person document in the Public Name & Address Book. The ACT! For Notes Contact database must be in your default Notes directory or in a path relative to it. The URL for your database will be http://[IP address of your server]/[path to database relative to default Notes directory]/.

Browser Settings Recommendation

- **Microsoft® Internet Explorer v4.x and higher** Font size "Smaller" (VIEW>TEXT SIZE>SMALLER) when using display resolution 800x600;

- **Netscape® Communicator v4.x and higher**
- Font size "Fixed width font" should be set to 9 when using display resolution 800x600

ACL Setting Recommendations

For maximum Internet security, make the Default in your ACL No Access, and create and entry called Anonymous with No Access (User Type Unspecified).

Chapter 8: Keeping the Database Consistent

ACT! For Notes provides agents to help maintain the integrity of the data. In order to use these agents, the user must be either listed an Editor or Designer with membership in the [AFN Admin] role, or as a Manager in the database ACL.

Remove User Profile Agent

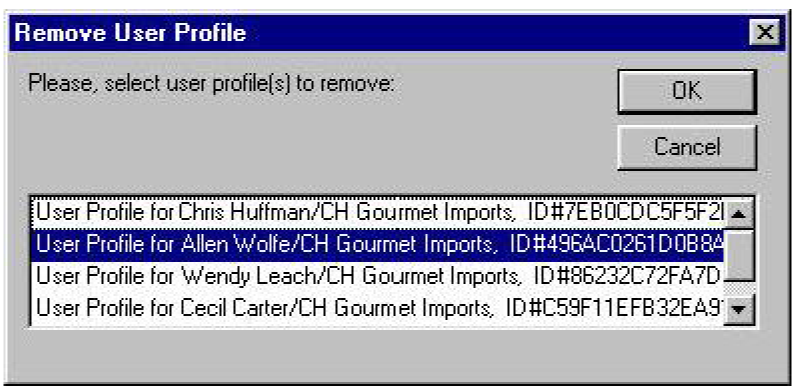
When a user opens the contact database, a user profile document is created. The document combines user settings from Preferences document and current user's User document. By "caching" the settings, "response time" is improved in all agents and formulas, which refer to the Preferences and User documents. These settings are easily accessible in the profile document. When the user closes the contact database, the User Profile document is removed.

It is recommended to use the Remove User Profile agents if a users profile document does not get updated with changes from User or Preferences document.

To run the Remove User Profile agent:

1. Select ACTIONS>ADMIN TOOLS\REMOVE USER PROFILE from the menu.

2. Select the User Profile document to remove and click OK.



Check Database Consistency Agent

The Check Database Consistency agent runs on all documents in the contact database. The agent checks for the following inconsistencies in the database:

1. The document's ID field does not match its Universal ID.

2. A main document, such as a contact, has a response property. If a main document is not a replication conflict and a $REF field then the $REF field is removed from the document.

3. A response document, such as a note or activity, does not have a corresponding parent. If a parent document can not found for a response document then the response document is deleted.

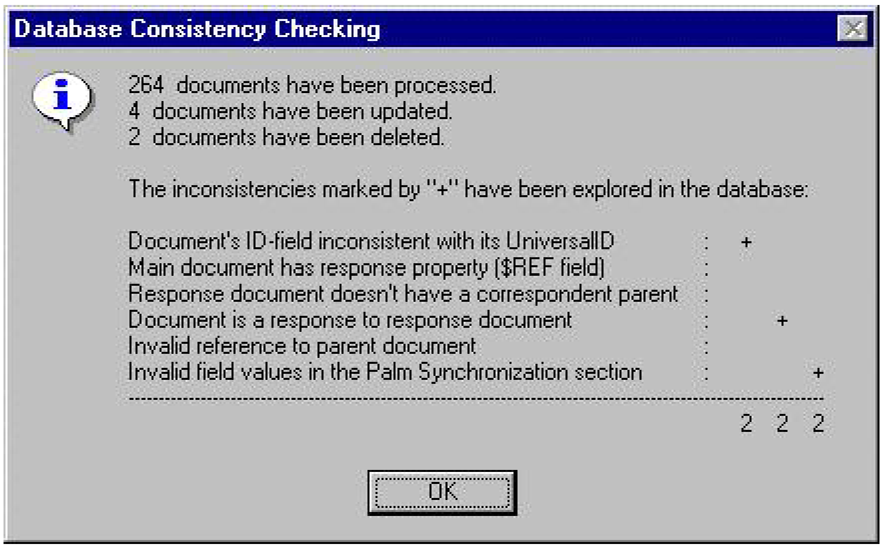
4. A document is a response to a response document and therefore removed.

5. A response document has an invalid reference to a parent document. The agent compares the parent's document ID, on the parent document, to the parent's document ID, on the response document. If there is a difference, the agent updates the parent's document ID on the response document.

To run the Check Database Consistency agent:

1. Select ACTIONS>ADMIN TOOLS>CHECK DATABASE CONSISTENCY from the menu.

When the agent is finished, a dialog box displays displaying the results of the consistency check.



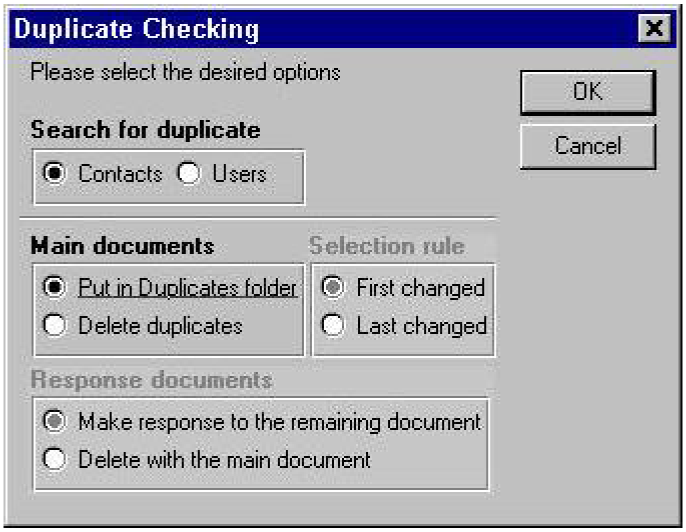
The numbers located at the bottom right are the subtotals for the inconsistencies listed. The sum of these numbers should be the same as the total of the number of documents updated and deleted.

Check Duplicates Agent

The Check Duplicates agent scans the database for duplicate contact or user documents. Documents in which the contact and company name, or the user and company name match are consider duplicates. You have the option to delete duplicates, or put them in a folder to resolve manually.

To run the Check Duplicates agent:

1. Select ACTIONS>ADMIN TOOLS\CHECK DUPLICATES from the menu. The Duplicate Checking dialog box displays.



2. Select the type of documents you want to check such as Contacts or Users.

3. Select how you would like to handle duplications.

a) To place duplicates in a folder:

- Select the radio button Put in Duplicates folder and click OK.
- Duplicates are places in a folder accessible by VIEW>GO TO… A dialog box displays listing views and folders.
- Select Duplicates folder to view documents. You can delete the documents that you do not want.
- Select the remaining documents and click Remove from Duplicates folder action button to remove them from the Duplicates folder.

b) To delete duplicates:

- Select the radio button Delete duplicates. Select which duplicate you would like to delete in the Selection rule area. **First changed** deletes the document with an earlier modification date. **Last changed** deletes the document with a later modification date.
- Select how you wish to handle the response documents connected to the deleted duplicate. **Make response to the remaining document** attaches the response documents to the document left in the database. **Delete with main document** removes the response documents from the database along with the duplicate.
- Click OK.

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