



# ANSWER QUEST TIP SHEET

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## The Year of Decluttering

I've proclaimed 2004 to be my year of decluttering! How do I propose to do this?

The first thing I decided to do was to organize my contacts (all those names, numbers, and miscellaneous information you want to keep about customers, clients, employees, friends, family, etc.). Back in 1998 I created a custom database that collected all this information. It worked great! The problem was as my contact list grew so did my needs. I now need a way to be reminded automatically of appointments, create a task list that linked back to my database, and most importantly -- be able to take this information with me when I leave the office.

The old database could be updated to do all this but that would have been very time consuming and costly. That's where ACT! ([www.act.com](http://www.act.com)) comes to the rescue. It is contact management software (basically, it's your rolodex on steroids in your computer). What makes ACT work for me is it already does the "extra" things I need plus more -- it also integrates with email and handheld devices.

This software now gives me a much broader use of data than ever before. Don't get me wrong, other databases out there can do this but it would take a lot of programming. ACT's purpose in life is to be contact management software. It does this one thing and does it great! The only drawback is that it is not totally customizable like other database programs. You have to work within the boundaries of the software.

Ok, so I picked my software to replace my old database. Now what? Using contact management software is a "habit" you have to create. You **MUST** be diligent in using it. One definition in Merriam Webster's online dictionary ([www.merriamwebster.com](http://www.merriamwebster.com)) is:

*"a behavior pattern acquired by frequent repetition or physiologic exposure that shows itself in regularity or increased facility of performance b : an acquired mode of behavior that has become nearly or completely involuntary"*

You need to RELEARN everything you've been doing up till now. This is not an easy task. Every time you talk with someone or collect new information about them, you need to enter it into ACT. This helps to leave a paper-less trail.

One great feature is the integration with email. I use Outlook XP (most other programs work -- go to <http://www.act.com/support/technicalsupport/index.cfm> to see about your version). Instead of going into Outlook to send email, you will send it from within ACT. Because it's integrated, that

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means I can still go into Outlook and see all the messages I've sent in sitting my SENT ITEMS folder.

The other feature was the ability to take my data with me. ACT can sync up to my handheld (this means it takes a copy of my data and moves it to my IPAQ ([www.hp.com](http://www.hp.com)). I chose the IPAQ because it uses Microsoft's Pocket PC operating system ([www.microsoft.com](http://www.microsoft.com)). Besides having all my data, I also have Word and Excel on my handheld. Installation and setup of the syncing software was a breeze. Simply use a USB cable between the IPAQ and PC and you are ready to go.

So to summarize, if you need to keep track of your contacts and want to declutter -- you might want to consider ACT! Once you get into the habit, you might start enjoying a more paper-free work environment!

## ACT! Tip

### Assigning Keyboard Shortcuts

You want to be able to just hit a few keystrokes to perform a backup several times per day. Instead of using your mouse, simply assign a "keyboard shortcut!" Here's how:

- Click on Tools
- Click on Customize Contacts Window
- Click on Keyboard tab
- Select the action you want to assign a keyboard shortcut too – in this example, select &backup
- Click on Assign Shortcut
- Using your keyboard, press the keys that you would like to use (if it's already in use, you will need to select another combination of keys) – in this example, press CONTROL and B together
- It will display the keys you pressed and indicate if it's currently not assigned.
- When finished, click OK
- Click OK to exit back to ACT!
- Test the keystrokes. If there is a problem, simply repeat and pick a different combination of keys



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