

The Lookup Menu

Looking up Contact records is what the **Lookup** menu does. Used properly, the Lookup menu can help you locate not just specific people, but groups of people based on more than one criterion.

Example: You want to see a list of all Contacts in New York who are Prospects.

Many common lookup fields are already set up for you to use in the Lookup menu itself.

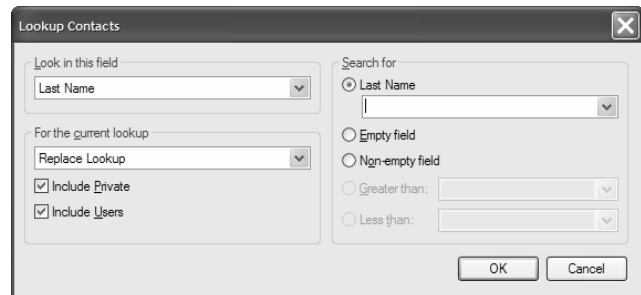
Procedure: *To lookup a record*

1. Choose **Lookup** from the menu. A number of common fields are displayed, like **Contact**, **Company...**, **First Name...**, **Last Name...**, etc. Click the appropriate item.



You can also right-click any field and select **Lookup <current field>** from the shortcut menu.

Note: the **Lookup** dialog box reminds you of the Lookup menu item you chose (**Last Name** in this case).



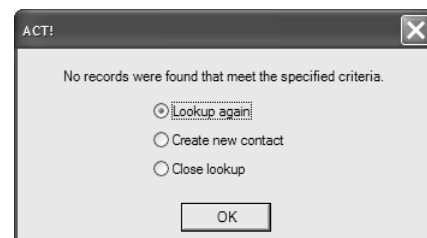
2. In the Search for area, type part or all of the name or number you wish to lookup. The lookup dialog box for some fields contains lists from which you may choose (**City** is an example of this).


You should type the *beginning* of the data for which you want to search. The more you type, the more specific the lookup.

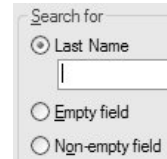
3. **OK**
 - ✓ If only one record matches your criteria, it will be displayed in **Contact Detail** view.
 - ✓ If more than one record matches your criteria, the results will be displayed in **Contact List** view.
 - ✓ If no contacts match your search criteria, then ACT! offers you the option of... **Lookup again**, **Create new contact**, or **Close lookup**

ACT! scans all available records and displays only those records that fit the lookup.

If necessary, double-click the contact you want to display in Contact Detail view.



 *Extra points for you if you noticed the **Empty field** and **Non-empty field** options. Click one of these options to lookup all records where the chosen field is empty (so that you can fill in the blanks) or all non-empty fields where there is something typed (like all Contacts with fax numbers).*



Search for
 Last Name

 Empty field
 Non-empty field

Lookups are easy if you remember just a few things:

- ✓ You can right-click any field to perform a lookup on that field.
- ✓ Lookups are not case sensitive - all you have to do is spell it right!
- ✓ The more you type, the more specific the lookup is. The less you type, the less specific it is.

Example: You are looking up a Last Name. Type the letter “h” to lookup all Contacts that begin with the letter **H**. Type **Hal** to locate all Contacts with last names that begin with **Hal**. Type **Hall** to look up only the last name of **Hall** (now how many of *those* could there be? Well there could be a Hallmark).

Example: You want to lookup only those people in a certain area code. Do a lookup on **Phone** and type the area code only. The result is all those Contacts whose phone numbers begin with that area code.

- ✓ You can lookup the full Contact name (really handy for common names like Susan Clark). However, be aware that you must enter the name exactly as the name displays in the Contact field...down to any periods or commas. For example, John D Rockefeller...not John D. Rockefeller or John Rockefeller. However John D Rock will display records for both Jr. and Sr.
- ✓ Results of the lookup will depend on what type of field you are searching.

If the field has a **simple drop-down** list or **no drop-down** list, then ACT! will only return records where the data in the field you are searching on “Starts with” the search criteria you input (e.g. Searching for a city “Cleveland” will find “Cleveland” and “Cleveland Heights”, but will not find “East Cleveland.”)



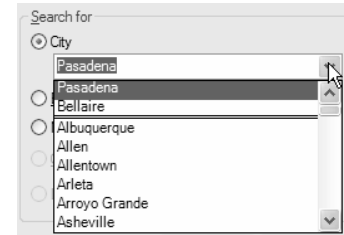
New York
New York
New York City
Newport Beach
North Hollywood

If the field you are looking in **allows multiple selections** from the drop-down (i.e. drop-down lists that display a to the left of the options as in the ID/Status field), then ACT! will return records where the data you are searching for is “Contained” anywhere in that field (e.g. “Lead” would find “Hot Lead”, “Qualified Lead”, “Lead”, as well as “Leader” or “Pleading Innocent” – not a likely ID/Status – but you get the point.)



Consultant;Contract
 Cold Lead
 Competitor
 Consultant
 Contractor
 Customer
 Employee
Edit List Values...

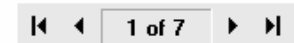
- ✓ You may exclude Private records by unchecking that option. You can also exclude Users (people who have been given log on rights to the database).
- ✓ ACT! remembers the last five search strings that you used for looking in each field. If the field contains a drop-down list, the pre-defined values will display below the most recently used list.
- ✓ Greater than and Less than options are available for numeric or date fields.



To return to viewing all Contact records, choose **Lookup, All Contacts**.

The Effects of a Lookup

When you perform a lookup, if more than one record is found that matches your criteria, the results will be displayed in the Contact List view. The record counter reflects the number of records that fit the lookup and which of those Contact records you are currently viewing. You may use normal navigation keys or the mouse to browse these Contacts.




Seven contacts matched the lookup example

Every time you perform a Lookup, ACT! scans all records available to you, not just those currently displayed (unless you change the options.) It is **not** necessary to lookup all Contacts before performing a new Lookup.

Mini-Exercise: Simple Lookups

Step	What to do	How to do it/Comments
1.	See if you have anyone in your database with a last name of Goodall .	Choose Lookup, Last Name... , type goo , and click OK .
2.	How many records did ACT! find to match your entry?	Should have only found one record
3.	Try to move to another record.	Click the Previous button or press [PageUp] . It doesn't do much good, does it? It's because you are currently displaying 1 of 1 Contact records.
4.	Display all of the records in the database.	Choose Lookup, All Contacts .
5.	What record is displayed? What number is it?	It's still Ms. Goodall! Her record is still displayed, but now it displays the total number of records in the database.
6.	Now try to move to another record.	Now you can move to other records because the lookup is All Contacts .

Step	What to do	How to do it/Comments
7.	<p>Lookup Ernst Anderson’s record by searching for last names starting with “and”.</p> <p>How many records does ACT! find? Why?</p> <p>Display his record in Contact Detail view.</p> <p> <i>Notice that the Contact Detail view is limited to the same three names.</i></p>	<p>Choose Lookup, Last Name..., type and, click OK. More than one contact matches your criteria, so ACT! switched to Contact List view. The indicator at the top of the window probably says 1 of 3. It seems Ernie is not the only Anderson in the database.</p> <p>Double-click his name to display it in Contact Detail view.</p>
8.	<p>How many Contacts in the database contain an ID/Status of “Influencer”?</p> <p>Notice that “Influencer” is not always the first word in the field.</p>	<p>Right-click the ID/Status field and select Lookup ID/Status type in and click OK.</p> <p>Double-click the first Contact to display them all in Contact Detail view. Browse the records to review the other ID/Status listings.</p>
9.	<p>How many Contacts in our database have fax numbers?</p>	<p>Right-click the Fax number field and select Lookup Fax Phone (or choose Lookup, Other Fields..., and select Fax Phone). Click on Non-empty field and click OK.</p>
10.	<p>How many people has Anthony Federici referred to us?</p>	<p>Return to Contacts view. Right-click the Referred By field and select Lookup Referred By. Notice that you have to change the options in the Search for section before we can type in Anthony’s name.</p>
11.	<p>Let’s thank Anthony. While still in Contact List view, use the Lookup menu option to lookup the full Contact name of Anthony Federici.</p>	<p>Lookup, Contact, Anthony Fed (you don’t have to type all of it), OK. (If you are in Contact Detail view, you could also right-click the Contact field and select Lookup Contact.)</p>