Creating New Activity Types

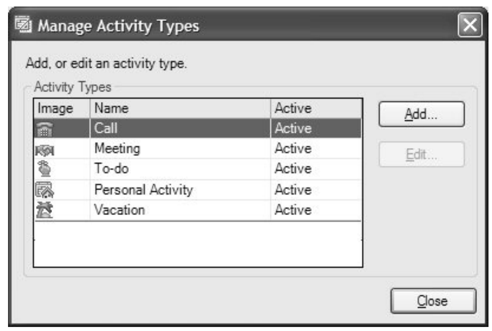
ACT! comes with five basic activity types: Call, Meeting, To-Do, Personal Activity, and Vacation. If you have the need, you can create additional activity types. For example, if your business markets through trade shows, you might want to create a "Trade Show" activity type. You can also use this valuable feature to better manage your sales force by creating activity types that differentiate between Prospecting Calls and Maintenance Calls. The possibilities are endless.

Procedure: ***To create a custom activity type***

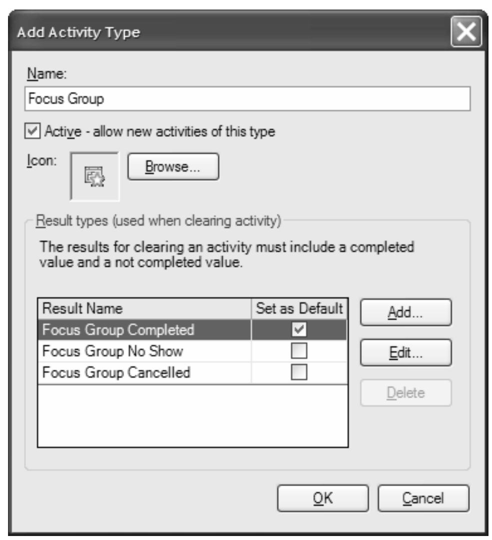
1. **Schedule, Manage, Activity Types…**

   Think it through carefully, and create only those you need.

   ☞ *Don't create new Activity Types lightly. Once they have been created, you cannot delete them. You can deactivate them, but they will be in the list forever. Consequently only users with Administrator or Manager roles have the authority to create a custom Activity Type.*



2. Click the **Add…** button.

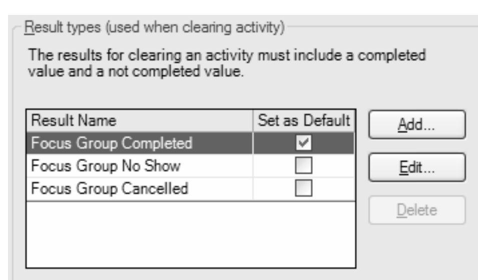


3. **Name:** the activity type.

   If you have access to icon files, you can use the **Browse…** button to select an **Icon;** for your new activity type.

4. Select a Result, click **Edit…**, and modify the **Result name:** to include the new Activity Type name, and click **OK**.

   To add a new result click **Add…**, type the new Result Name, and click **OK**.



☞ *If the Activity Type is "Focus Group", you should change **Completed** to **Focus Group Completed**. If you leave the default result name, all you will see in history is **Completed** with no indication of what type of activity was completed (or originally scheduled).*

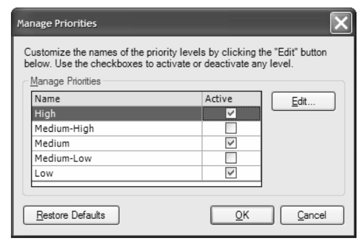
5. Click **OK**. The new Activity type will now be available to all users.

Customizing Priorities

At first glance, it would appear that there are only three priorities (Low, Medium, High). Actually there are two more: **Medium High** (purple) and **Medium Low** (Aqua). These two additional priorities (for the terminally detail oriented) are turned off by default. If you need them, they are there for you or you can change the names of the priorities to suit your needs.

Procedure: To Activate or Deactivate an existing Priority

1. **Schedule, Manage, Priorities…** Only users assigned a Manager or Administrator role can make these changes

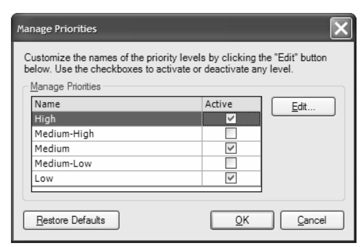


2. Check any priorities you wish to activate and uncheck those you wish to deactivate.

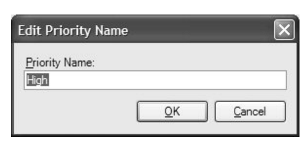
3. **OK** The next time you schedule an activity, only the priorities you checked will be available to you.

Procedure: To edit a Priority name

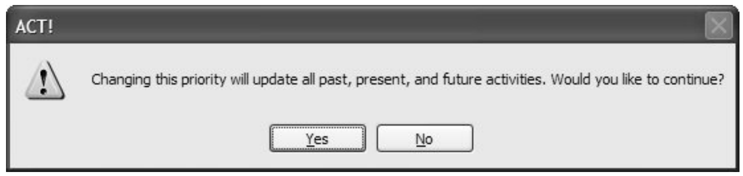
1. **Schedule, Manage, Priorities…** This feature can only be accessed by users assigned to a Manager or Administrator role



2. Click on the priority you wish to edit and click **Edit…** The **Edit Priority Name** dialog box is displayed.



3.	Type the new name for the priority. Click **OK**	The priority name changes in the Manage Priorities list.
4.	Repeat until all priorities have been renamed to suit you. Click **OK**.	A dialog box is displayed that lets you know what is about to happen. Namely all existing Activities that used the original priority names will now use the new ones.



5.	Click **Yes** to complete the process.	ACT! will change the priority on all existing activities to match the new value(s).

☞ *Deactivating a priority you have used in your scheduled activities will have no effect on those activities. They will continue to display the selected priority even though it will not be available for future activities.*

Mini-Exercise: How important is it?

Step	What to do	How to do it/Comments
1.	Schedule a meeting with one of your contacts for Next Tuesday at 3:00 pm. Regarding **Publication Deadline.** Make it a Medium High Priority.	First we have to enable the Medium High Priority. Click **Schedule, Manage, Priorities…** Put a check next to Medium-High (and Medium-Low if you like), **OK**. Then, locate the contact that you will schedule the activity with. Click the Schedule Meeting icon on the toolbar and set the meeting time and **Priority**, in the **Regarding** box, type "Publication Deadline", **OK**.
2.	Display the **Activities** tab for the contact if necessary and observe the new activity.	It's a different color than usual, isn't it?
3.	Display the **Task List** view and filter All Activities for only **High** and **Medium High** Priorities.	Display the **Task List** view, in the **Priorities**, uncheck **Medium**, **Medium Low** and **Low**.
4.	Return to displaying all Priorities.	