Advanced Lookup by Groups

v.5.0

for ACT! 2006

Another efficient and affordable ACT! Add-On by

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Purpose of the add-on

This add-on allows you to create lookups of contacts based on their group membership. You may quickly create lookups of contacts belonging to several groups at the same time (group intersection) or belonging to at least one group of a list. You may also create lookups of contacts not belonging to a group (groupless contacts) or contacts belonging to at least a group, etc.

Installation procedure

Download the program file from our download page and double-click it to start the installation.

Note that contrarily to versions supporting previous ACT! versions and because of the changes in ACT!, add-ons are now DLL files and not executable files. This means that they are automatically initialized by ACT! when placed in ACT! plugin folder (a subfolder of the main ACT! directory) and cannot be started from the Windows Start menu anymore. This is why you are not given a choice of installation directory during the installation process.

ACT! should automatically add an icon to the Contact Details, Contact List, Group Details and Group List windows and an item to the Tools menu. Icons and menu items are now the only ways to start your Exponenciel add-on.

Creating a lookup of contacts using the tree view

Advanced Lookup by Groups main window displays your groups in a tree view allowing you to visualize your group hierarchy. Click on the plus signs to expand the nodes and see the subgroups of your groups.
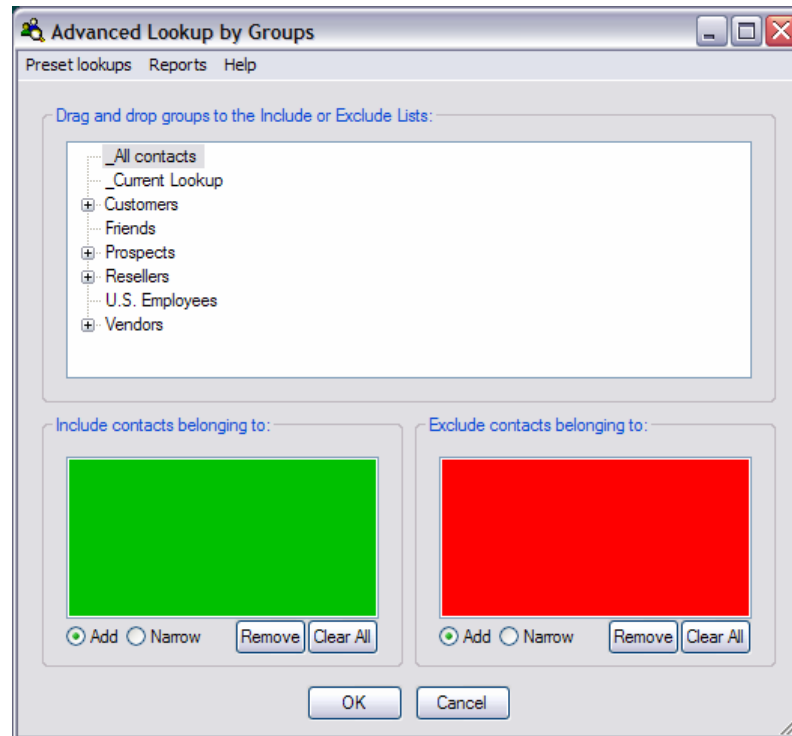
To create a lookup of contacts, simply drag and drop groups (or sub-groups) to either the *Include* list (in green) to include in the lookup contacts belonging to a group or the *Exclude* list (in red) to exclude contacts belonging to a group. Then click OK.

Here are examples of a few types of lookups you may create.

Lookup of contacts belonging to different groups (addition of groups)

Drag and drop several groups in the *Include* list, check the *Add* radio button and click *OK*.
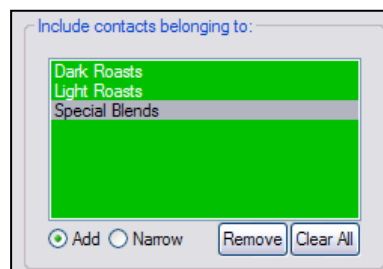
Advanced Lookup by Groups will add all the contacts of the groups together and create a lookup with them.

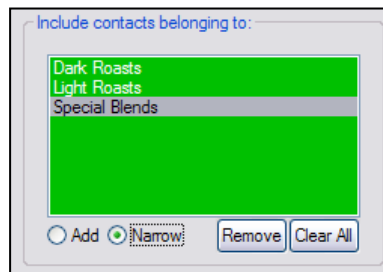## Lookup of contacts belonging to several groups at the same time (cross-section of groups)

Drag and drop several groups in the *Include* list, check the *Narrow* radio button and click *OK*.
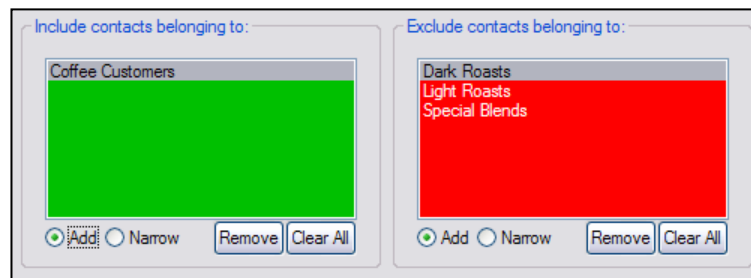

Advanced Lookup by Groups will isolate the contacts who belong to all the groups at the same time and create a lookup with them.

Lookup of contacts belonging to a group but not to another group

Let's take an example. We want to create a lookup of contacts belonging to the *Coffee Customers* group but not to the *Dark Roasts*, *Light Roasts* or *Special Blends* group.

We drag and drop *Coffee Customers* in the *Include* list and the three other groups in the *Exclude* list. We make sure the *Add* radio button is checked below the *Exclude* list. Then we click OK.

Advanced Lookup by Groups will scan the contacts of the *Coffee Customers* group and see if they are in any of the three groups. It will keep only those that are in none of the other groups and create a lookup.

Using the All contacts and Current lookup options

Using the same principle, you may use the *_All contacts* and *_Current lookup* "groups". For instance, if you want to create a lookup of all contacts that are not in a list of groups, drag *_All contacts* to the *Include* list and the groups in the *Exclude* list.

Here is another example: if you want to reverse a lookup, drag *_All contacts* to the *Include* list and *_Current lookup* to the *Exclude* list. In this case though, you might simply use the *Preset lookups > Reverse lookup* menu command.

Understanding the Add and Narrow options

When you have more than one group in a list, you should think about whether you want to check *Add* or *Narrow*.

- If you choose *Add*, Advanced Lookup by Groups will include in the *Include* or *Exclude* list all the contacts that belong to one group or another.
- If you choose *Narrow*, Advanced Lookup by Groups will only include the contacts that belong to all the groups at the same time.

Using Preset lookups

The *Preset lookups* offers a few preset options. Simply select the command and Advanced Lookup by Groups will create the lookup. Using preset commands, you may create:

- a lookup of contacts belonging to at least a group
- a lookup of contacts belonging to more than one group
- a lookup of contacts belonging to no group (*Groupless contacts*)
- a lookup of contacts who do not belong to the current lookup (*Reverse current lookup*)

Creating reports and lookups

The *Reports* menu allows you to create quick reports to be viewed in a text editor. Except for the first report (*Record count by group*), once the report is displayed in your default text editor, you will have the option to create a lookup of the contacts.

The two reports offering this option are:
- *Contacts in parent group but not in subgroup* lists all the contacts that are in group but not in the subgroups of this group. This is useful if you systematically want all the contacts in a group to be in at least one of its subgroup. Here is an example of the report output:

```
5/22/2005 11:21:00 PM
==========================
AMERICAN DREAMS - HAYLEIGH FRIEDA - belongs to PROSPECTS but to none of its direct subgroups
ARCADIA AVE. FLORIST - JACKIE JORGENSEN - belongs to RESELLERS but to none of its direct subgroups
BEST LENDER FINANCING - BENNY LENDER - belongs to CUSTOMERS but to none of its direct subgroups
BLACK FOREST BAKING - KRISTI ELMENDORF - belongs to COFFEE CUSTOMERS but to none of its direct subgroups
BRANDEE'S BAKERY - LIZ DITTMEIER - belongs to COFFEE CUSTOMERS but to none of its direct subgroups
```

If you choose to create a lookup of the contacts included in this report, you will be able to fix these contacts immediately.

- Contacts in subgroup but not in parent group lists all the contacts that are in a subgroup but not in the parent group of this subgroup. This is useful if you consider that a contact should systematically be in the parent group, if it is in a subgroup. Here is an example of the report output:

```
5/22/2005 11:26:40 PM
==========================
BLACK FOREST BAKING - KRISTI ELMENDORF - belongs to CHOCOLATE DISRIBUTORS but not to its parent group CUSTOMERS
BLACK FOREST BAKING - KRISTI ELMENDORF - belongs to COFFEE CUSTOMERS but not to its parent group CUSTOMERS
BLACK FOREST BAKING - KRISTI ELMENDORF - belongs to SPECIALITY STORES but not to its parent group RESELLERS
BRANDEE'S BAKERY - LIZ DITTMEIER - belongs to COFFEE CUSTOMERS but not to its parent group CUSTOMERS
```

Known issue

You might be surprised to find in the lookups created by Advanced Lookup by Groups contacts that do not show under the *Groups/Companies* tab that they are members of the groups you added to the Include list.

That is because in ACT! v. 7.3 and older, ACT! is not always correctly reporting group membership under the *Groups/Companies* tab of the *Contact Detail* view. We cannot predict when the situation will be corrected but the bug may be fixed by future ACT! releases.

If you want to have a correct group membership view for each contact, we invite you to use our free *AddToGroup* add-on available from http://www.exponenciel.com.

Registering Advanced Lookup by Groups

You may buy licenses from Exponenciel. Registration is based on ACT! user names, so you will have to supply your ACT! username when registering. Once you get your registration code, simply go to the *Help | About* menu.

Support

For support, please contact support@exponenciel.com.

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