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Act! Company Management Peek #Actv16Peek #ActCRM

by [benjamin](#) on 08-09-2013 11:04 AM

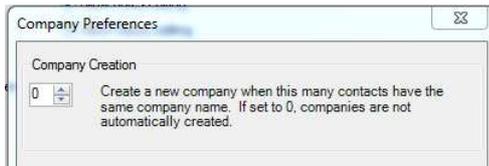
What's the purpose of a company record? What practices do you employ to use them?

For years we've had company records without any strong guidelines of how to maximize their potential. With Act! v16 we put forward the idea that the primary value of a company record is the aggregation of contact notes, histories, and activities in one place.

To help our customers enforce this best practice we have added a new preference for company management. Within 20 seconds you can enable this feature and set the threshold for number of contacts before creating a company. I recommend setting this to 2. What this will do is automatically create a company record after the second contact is created with the same company name. We'll link all of the contacts to that company so you can start seeing their data in one place. This will enable you to market and sell intelligently, because you're informed and prepared based on a complete view of all contact interactions at a company, and save time by performing global actions like emailing and scheduling. Company records are automatically created both in the office and using Act! Premium Mobile.

This is special because previously it took 3-7 clicks to create and link each contact. Plus because there was no enforcement, you never know if all your contacts for a company were linked or if you missed someone.

Automatic enforcement of a best practice means that you can trust the data and just do your job!



This will also look back into your database and apply these changes to contacts you created years ago.

Some of our partners dislike this feature because it does not copy the contact details. This is something we'll look at for a future release.

Would you use this feature?

Benjamin Lederer
Product Manager for Act!

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by Pam Mannell on 08-09-2013 11:15 AM

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If it could detect fields that are linked between Company and Contact and use those to copy data from the Contact to the newly created Company record it would be even better.

Think this is a really useful new feature - especially as it will check your existing database when you first activate it.

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1 Kudo

by [benjamin](#) on 08-09-2013 11:24 AM

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Pam, I agree. The problem is when you have two contacts, which address does it chose?

Let's use Swiftpage as an example. I set the threshold to 3. I work in Scottsdale, AZ, but Tawny works in California, and Brent works in Chicago. The real headquarters is in Denver.

Which address does it chose? None of them are completely correct .

My belief was it is better to be 100% right all the time. The whole point is to remove some of the thinking we have to do to maintain a well groomed database, so it leaves our precious brain power for more important things. Like our customers!

It's not that I don't believe that this is solvable, just that it was too complicated to try to stuff it all in at first.

I think the easy solution moving forward is a button to copy linked fields from Contact to Company. This gives a lot of control and value to users even if they aren't using this feature.

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by  Igleo 08-09-2013 05:41 PM - edited 08-09-2013 05:41 PM

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This is a case of less is more.

It's a welcome addition, the benefit isn't in the detail of what it can or can't do with address information, the benefit is in shifting people's focus to an under utilised feature of Act! and if more people discover the benefit of company records, then that's great. The way the detail is best handled will evolve with community input.

There will be many different reasons for using company records better, for instance I see it as a contact data aggregator. In our business as consultants we are recording job or work sheets against people in the contact records for a company in a custom tab. Rather than have to move through all the contact records for a company to find a particular entry I need to invoice for, I can go direct to the equivalent tab in company and see the complete picture.

Just with that small bit of automation the Swiftpage team have made a big difference. It may not be seen as the most impressive feature in this release, I think improvements will come as people start to use company records more. - smart move Swiftpage - well handled.

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