Allied Financial Software Knowledgebase

Assigning Task and Task Details

1) When assigning a task to someone else in my group, the calandar used to show who prepared task and who it has been asigned to. This is no longer evident in the new version. We aren't sure who created the task and who it has been assigned to.

2) Printing Tasks: When a task is created, often details are recorded in details tab. In ACT! 6.0, when we printed the task from the "details" tab, the print-out would show, at the top, task date, name of client, due date, who assigned it, etc... In ACT! by Sage 2006/2007/2008, when we print the task, only the information typed in "details" tab prints!!!

Do you have a fix for these?

You can add the Scheduled For, Schedule By and/or Scheduled With to your Task List. Choose the Options button at the top Right side of the Task List and then Customize Columns. Add the fields you would like to display.

To filter a calendar, add the users via the Select Users filter. In large, multi-user offices, we often recommend that you include the initials of user in the Regarding field, ie. TSA - Annual Meeting for Mary Jones or, TSA/GT/HRG - Annual Meeting for Mary Jones. Also, ACT! will allow you to schedule an activity FOR only one user but WITH multiple users and contacts.

We were recently made aware that the print icon in the Activity Details tab does not print the entire activity but only the details. As a result, we submitted a feature request to Sage Software to add the feature to the newer versions of the ACT! software. Several ACT! consultants agreed and we all complained that this was the way ACT! 6.0 worked. We have not heard if or when the feature will be added but I would suspect it should not be a big deal.

In the meantime, you can create a simple ACT! report that will do the same thing or consider an addon like Task List Plus or Calendar View Plus from

www.durkincomputing.com. These programs allow much more feature rich reporting and functionality that standard ACT!
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http://kb.actforadvisors.com/questions.php?questionid=107