

Allied Financial Software Knowledgebase

How do I create a lookup of contacts based on the activities that I have scheduled with them?

Follow these steps:

Choose the View Menu, and click Task List. The Task List view appears. Choose the View Menu, and click Filter Task List. The Filter Activities dialog box appears. Set the filters to display the activities you want to view. You can filter on date, type, priority and more to get just the activities you want to see. Then right-click in the window, and on the shortcut menu click Create Lookup. ACT! creates a lookup based on the contacts listed in the Task List view and returns to the Contacts view.

Act4Advisors

<http://software4advisors.com>

Allied Financial Software, Inc.

<http://kb.actforadvisors.com/questions.php?questionid=37>