

Allied Financial Software Knowledgebase

How to Tag Contact Records in ACT!

Question:

I want to send a common e-mail to only those prospects I talked to today. A general lookup in ACT! will not give me this specific list. Is there a way by which I can do this in ACT!?

Answer:

Yes, you can tag or mark contacts in ACT! to create a lookup of contacts manually. To do this,

Select 'Enable Tag Mode' option from the 'Contact List'. Select the contacts to tag by clicking on the contact record. To tag all contacts in the Contact List, click 'Tag All'. To create a Lookup of the tagged contact records click 'Lookup Selected'. Right click on the Lookup that is created and select your action.

You can now send a common e-mail to all the tagged ACT! contacts

<http://kb.actforadvisors.com/questions.php?questionid=74>