

DataPlus Plugins & Tools



**Add functionality & extend
the capabilities of Act!.**

- **dpHistory – with one click of a button, will create Act activity, clear the activity, create an Act history. Your record is now in Task List, History List, Calendar & available in contact or company Activity & History tab.**
- **When saving dpHistory you can choose to send current contact email with history details in body.**
- **While taking notes using dpHistory you can continue to use all functions within Act.**
- **When you start dpHistory, timer starts providing accuracy of duration for your activity & history.**
- **Auto Fill regarding & details saving you time & providing consistency.**

Compare

The default Act History & dpHistory look very much alike.

Performance, time & usage are quite different.

When you use dpHistory, you are in command of your valuable use of Act.

You choose to have history recorded on your calendar with less mouse clicks!

Your default Act History

New History

Type: **Call** Result: **Call Completed**

Contact: **Dawson, Ania [ABS Garages Ltd]** Contact...

Date: **1/15/2018** Time: **10:23 AM** Duration: **10 minutes**

Attachment: Attach

Share With: ...

Record Manager: **Chris Huffman**

Regarding: **Using default Act History**

Details: Microsoft Sans Serif 14 B I U S

When you create an Act History to take notes while talking to current contact, you are unable to perform any tasks in Act other than a follow-up Activity.

You cannot review past histories, look at calendar, data mine DataPlus tab accounting data if installed. Basically disabling Act. Also if you don't change the duration your history duration is you default setting. Actual time could be 55 min vs 15 min.

Private Follow-up... OK Cancel

Using Act History disables any continued use of Act except follow=up

Send email to current contact with details of history!

Minimize dpHistory and access Act!

Your Act History using dpHistory

dpHistory

Type: **Call** Result: **Call Completed**

Contact: **Dawson, Ania [ABS Garages Ltd]** Contact...

Date: **1/15/2018** Time: **10:24 AM** Duration: **10 minutes**

Attachment: Attach

Share With: ...

Record Manager: **Chris Huffman** Send e-mail after created

Regarding: **Create Act History using dpHistory - Will also create cleared Activity & send e-mail** Auto Fill

Details: Microsoft Sans Serif 8 B I U S

When you use dpHistory to create an Act History your timer starts, you take notes, you can minimize dpHistory and use Act, dock dpHistory and use Act, perform follow-up Activity after check your full calendar.

You are back in control of your Act applications!

Timer: 00:03:39

Pause Timer

Replace Time

Add To Time

Dock

Private Follow-up... Paste Create Cleared Activity and History OK Cancel

Active timer giving you "actual" duration when completed

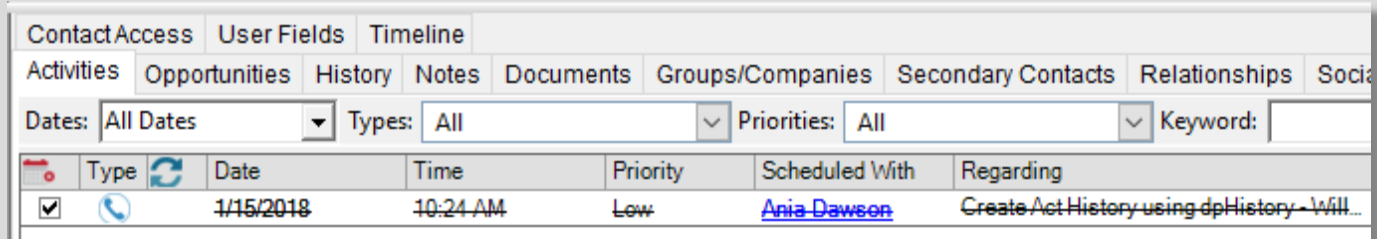
When you hit OK, dpHistory creates Activity, clears Activity, creates History!

History Records

dpHistory provides more accurate records in Act.

Contact Activity

After creating dpHistory, a cleared activity is created with actual duration.

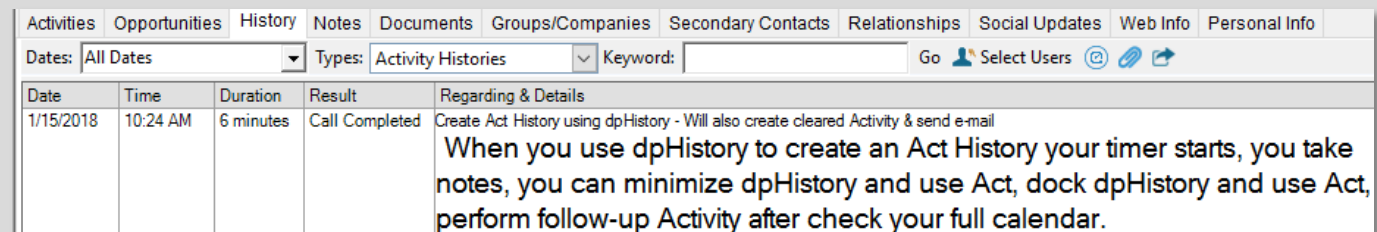


The screenshot shows the 'Contact Access' view in Act. The 'History' tab is selected. The 'Dates' dropdown is set to 'All Dates' and 'Types' is set to 'All'. A table below shows a single activity record:

Type	Date	Time	Priority	Scheduled With	Regarding
	1/15/2018	10:24 AM	Low	Ania Dawson	Create Act History using dpHistory - Will...

Contact History

After creating dpHistory, a history is created with actual duration.

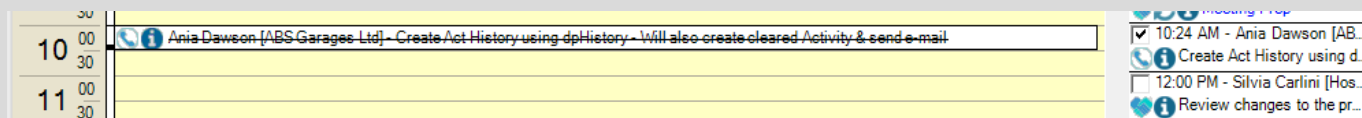


The screenshot shows the 'History' view in Act. The 'Types' dropdown is set to 'Activity Histories'. A table below shows a history record:

Date	Time	Duration	Result	Regarding & Details
1/15/2018	10:24 AM	6 minutes	Call Completed	Create Act History using dpHistory - Will also create cleared Activity & send e-mail When you use dpHistory to create an Act History your timer starts, you take notes, you can minimize dpHistory and use Act, dock dpHistory and use Act, perform follow-up Activity after check your full calendar.

Calendar

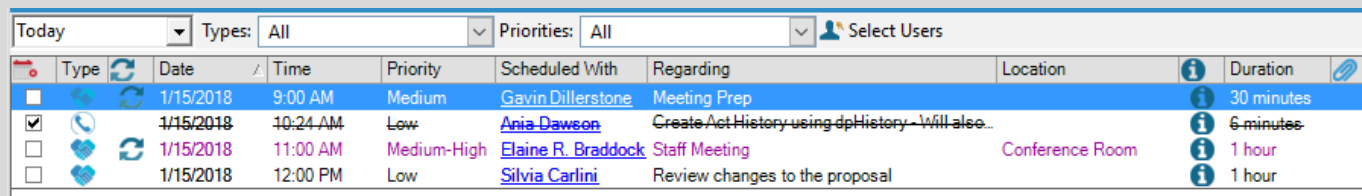
After creating dpHistory, activity is displayed in calendar.



The screenshot shows the calendar view in Act. A cleared activity is displayed as a yellow bar at 10:24 AM on 1/15/2018. The activity title is 'Ania Dawson [ABS Garages Ltd] - Create Act History using dpHistory - Will also create cleared Activity & send e-mail'. A tooltip is visible over the activity, showing details like '10:24 AM - Ania Dawson [AB...]', 'Create Act History using d...', and '12:00 PM - Silvia Carlini [Hos...]'.

Task List

After creating dpHistory, cleared activity is displayed in Task List.

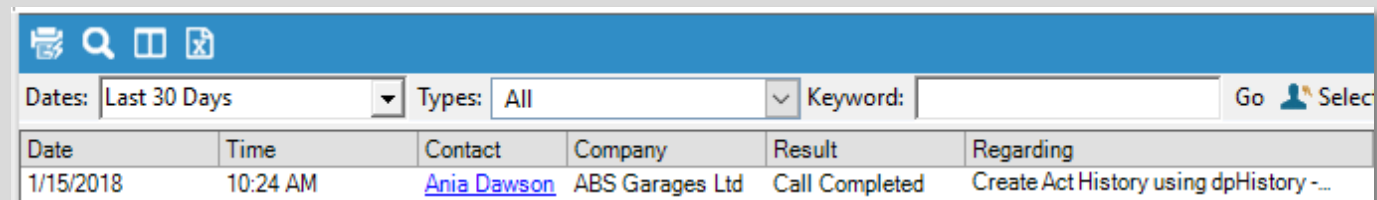


The screenshot shows the Task List view in Act. The 'Types' dropdown is set to 'All'. A table below shows three activity records:

Type	Date	Time	Priority	Scheduled With	Regarding	Location	Duration
	1/15/2018	9:00 AM	Medium	Gavin Dillerstone	Meeting Prep		30 minutes
	1/15/2018	10:24 AM	Low	Ania Dawson	Create Act History using dpHistory - Will also...		6 minutes
	1/15/2018	11:00 AM	Medium-High	Elaine R. Braddock	Staff Meeting	Conference Room	1 hour
	1/15/2018	12:00 PM	Low	Silvia Carlini	Review changes to the proposal		1 hour

History List


After creating dpHistory, history is displayed in History List.



The screenshot shows the History List view in Act. The 'Dates' dropdown is set to 'Last 30 Days' and 'Types' is set to 'All'. A table below shows a single history record:

Date	Time	Contact	Company	Result	Regarding
1/15/2018	10:24 AM	Ania Dawson	ABS Garages Ltd	Call Completed	Create Act History using dpHistory - ...

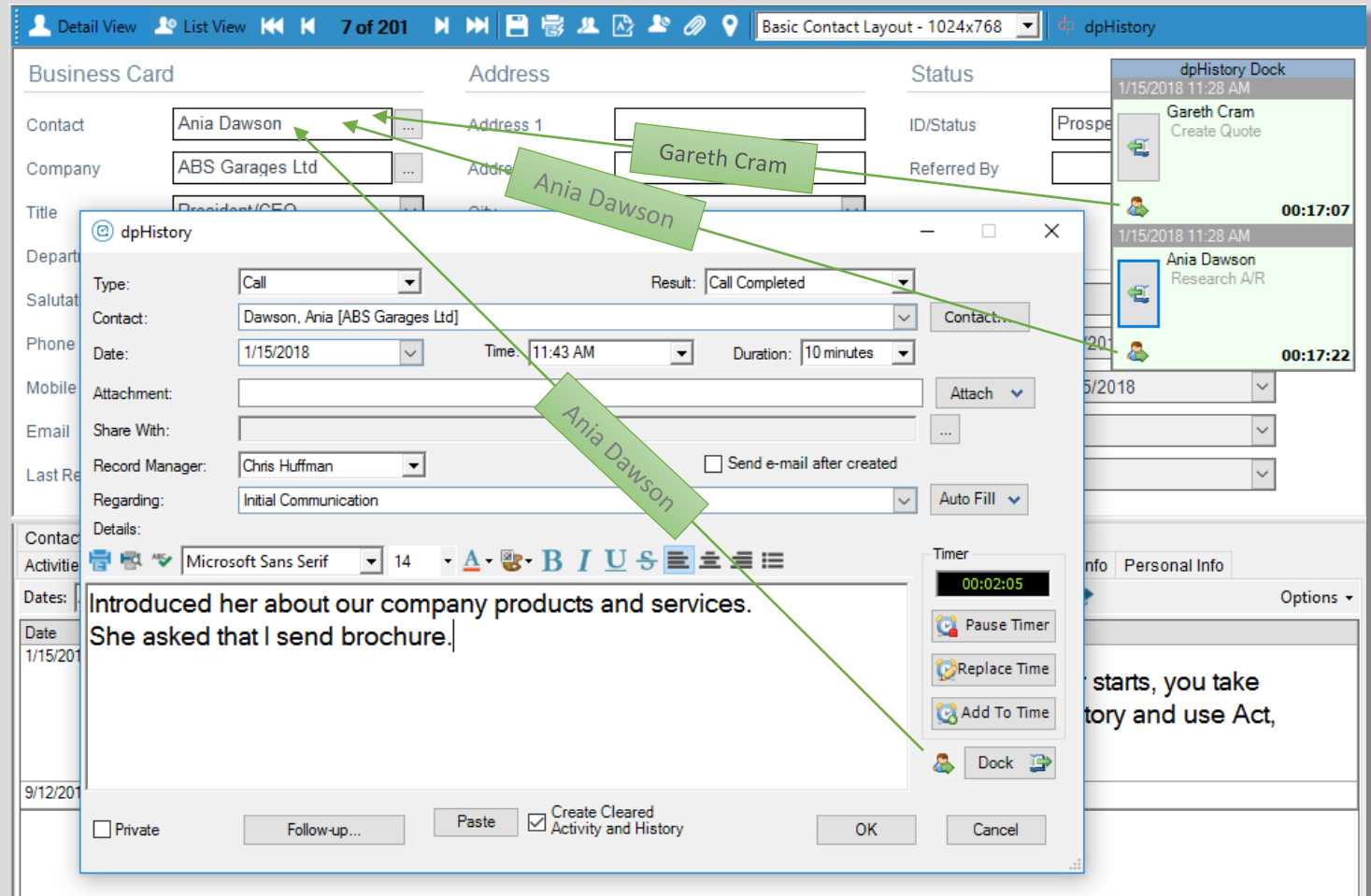
Additional Uses

Dock multiple dpHistory instances. Jump to running dpHistory contacts by clicking on  avatar icon.

Working on a project for contact? Pause dpHistory, launch new dpHistory instance for new phone call. When completed open running instance and restart timer!

Dock Multiple dpHistorys

- Navigate to different contacts while working.
- Track multi tasking for your daily activities with your contacts.
- dpHistory records the actual time duration for each history.
- E-mail contact with history regarding and details, making them aware of what you are doing for them.



The screenshot displays a CRM interface with a contact record for Ania Dawson. The contact details include her name, company (ABS Garages Ltd), and title (President/CEO). A dpHistory window is docked over the contact record, showing a call log for Ania Dawson. The call log entry is titled "Ania Dawson" and shows a call completed on 1/15/2018 at 11:43 AM, lasting 10 minutes. The call details include the type (Call), result (Call Completed), and a description: "Introduced her about our company products and services. She asked that I send brochure." The dpHistory window also shows a timer set to 00:02:05 and options to pause, replace, or add to the time. The background shows a list of contacts and a sidebar with a dpHistory Dock containing two entries: "Gareth Cram Create Quote" and "Ania Dawson Research A/R".

Settings and Auto Fill Tasks

Launch dpHistory Setting from Act.

Modify Settings with your preferences.

Create Auto Fill saving you time & creating consistencies

dpHistory Settings

Edit	Name	Regarding	Delete
Edit	Project (#1)	Project To Do	Delete
Edit	Project (#2)	Project To Do	Delete
Edit	Survey #1	Service	Delete
Edit	Survey #2	Product	Delete

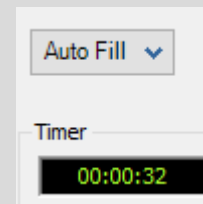
Set your preferences for dpHistory

- Default Type
- Create Cleared Activity & History
- Automatically Start Timer
- Send E-Mail
- E-Mail as Plain Text
- Launch dpHistory as Separate Window
- Add Icon to Toolbars
- Dock Opacity
- Edit/Delete Auto Fill
- Add Auto Fill

Name: Time Ticket
Regarding: Phone Support
Details: Product:
Issue:
Resolution:

Create or edit Auto Fill

- Name
- Regarding
- Details



When running dpHistory, click on Auto Fill to fill regarding & details saving you time!

Using Auto Fill

Launch dpHistory instance.

Click on Auto Fill with predefined settings.

Navigate & use Act with dpHistory open.

Record additional information in history details.

When finished, click OK.

dpHistory creates & clears activity and creates a history.

Create dpHistory

Type: Call Result: Call Completed
Contact: Huffman, Chris [CH TechONE]
Date: 1/15/2018 Time: 12:06 PM Duration: 10 minu
Attachment: Attach
Share With: CH TechONE [CMP]
Record Manager: Chris Huffman Send e-mail after cr
Regarding: Auto Fill
Details: Microsoft Sans Serif 8 B I U S
Private Follow-up... Paste Create Cleared Act OK Cancel

Launch dpHistory & click on Auto Fill

Choose preferred Auto Fill setting

Launch Auto Fill

Type: Call Result: Call Completed
Contact: Huffman, Chris [CH TechONE]
Date: 1/15/2018 Time: 12:06 PM Duration: 10 minu
Attachment: Attach
Share With: CH TechONE [CMP]
Record Manager: Chris Huffman Send e-mail after cr
Regarding: Phone Support Auto Fill
Details: Microsoft Sans Serif 8 B I U S
Product: Issue: Resolution: Timer 00:06:12 Pause Timer Replace Time Add To Time Dock
Private Follow-up... Paste Create Cleared Act OK Cancel

Auto fill History regarding

Auto fill History details

Edit your details while online with contact

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