

ACT Database Input Tips



Sage ACT! Premium - MetroWashemployers

File Edit View Lookup Contacts Schedule Write Reports Tools Help

Sage ACT! Back Forward New Call Meeting To-Do Note History E-mail Help Topics Search Go

Contacts Detail View List View 8167 of 13333 Commuter Connections 2013

Lookup
 Contact Field: Contact
 Contains: Go
 More Options...

Related Tasks
 View All Contacts
 Write Letter
 Print Current Screen
 Print Mailing Labels & Envelopes
 Modify Layout
 Schedule Activity Series
 Add Contact to Group
 Relate to Another Contact
 View Groups/Companies
 Manage Smart Tasks

Company MWCOG **Address** 777 N Capitol St NW, Suite 300 **E-mail** mhersey@mwkog.org **Conformity Status**

Contact Mr. Mark Hersey **ID/Status** UNDELIVERABLE **Remove Delete Record**

Salutation Mr. Hersey **Referred By**

Title **City** Washington **Jurisdiction** District of Columbia

Department **State** DC **Representative**

Phone 202-962-3383 **Ext** **ZIP Code** 20002-4239 **Rep- Phone**

Level **Web Site** www.commuterconnections.org

Fax (202) 962-3218 **DUNS**

Current Programs
 Compressed Wk;Formal Telework;Metrochek

Empl- Total 150 **Available Transportation**

Support programs | Web Info | Activities | Relationships | Social Updates | Marketing Results | Notes | History | Documents | Groups/Companies | Contact Info | Telework VA | Benefits offered | Additional Benefits | History of Programs | Survey Data | Live Near Your Work | Bill 3202 | Secondary Contacts

Transit Benefit Type Metrochek **Telework Program** Yes - Formal Policy **Parking Type** **Info Display Installed**

Transit Benefit Amount \$120.00 **Telework Start Date** 7/1/2000 **Company Vanpools**

Transit Benefit Start Date 7/1/1998 **Tele- Participants** 45 **Started Vanpools**

Benefit Participants 65 **Car Vanpool Spaces** 2 **Shuttle Start Date**

Welcome
 Connections
Contacts
 Groups
 Companies
 Calendar
 Task List
 Opportunities
 Reports
 Dashboard
 Search

Lookup: All Contacts Notes: 8 Mr. Mark Hersey

Starting off

- Simple Must Haves
 1. Actual Name, a title is not a person
 2. Address, including zip
 3. Employee total
 4. phone number

Helpful information for the Representative

- Website – helpful for updates (such as address change)
- Email – extremely helpful for outreach
- Current programs – a snapshot of programs now at worksite
- Jurisdiction – great for sorting searches
- Rep and rep's phone #

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Contact	Mr. Mark Hersey			ID/Status	UNDELIVERABLE		
Salutation	Mr. Hersey			Referred By		Remove Delete Record	
Title		City	Washington	Jurisdiction	District of Columbia		
Department		State	DC	Representative			
Phone	202-962-3383 Ext	ZIP Code	20002-4239	Rep- Phone			
Level	Level 4	Web Site	www.commuterconnections.org				
Fax	(202) 962-3218	DUNS					

Current Programs
 bike racks;cpssdWk;Formal Telework;Metrochek

Empl- Total 150 **Available Transportation** LC Transit;MARC;Metrobus;Metrorail;MTA bus;OmniRide;VRE

Capital Bike Share Corporate Partner	<input type="text"/>	Transit Screen Installation Date	<input type="text"/>	Car Charging Station	<input type="checkbox"/>
Capital BikeShare Station Installed	<input type="text"/>	Compressed Work Week Type	9/80	Type of Charging Station	Level 1
Bicycle Benefit	<input type="text"/>	compressed work week participants	<input type="text" value="25"/>	Number of Charging Stations	<input type="text"/>
Bicycle Benefit Participants	<input type="text"/>				

Benefits

- If a transit benefit is offered, include start date, type of benefit, participants and amount
- If a telework program is offered indicate formal or informal – include start date and participants
- Shuttle start date
- Company vanpool start date
- Info display installation date
- Bike benefit and participants
- Compressed workweek – type (9/80 or 4/40) and participants
- Electric Charging - # and type

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Company	<input type="text" value="MWCOG"/>	Address	<input type="text" value="777 N Capitol St NW, Suite 300"/>	E-mail	<input type="text" value="mhersey@mwco.org"/>	Conformity Status	<input type="text"/>
Contact	<input type="text" value="Mr. Mark Hersey"/>			ID/Status	<input type="text" value="UNDELIVERABLE"/>	<input type="button" value="Remove Delete Record"/>	
Salutation	<input type="text" value="Mr. Hersey"/>			Referred By	<input type="text"/>		
Title	<input type="text"/>	City	<input type="text" value="Washington"/>	Jurisdiction	<input type="text" value="District of Columbia"/>		
Department	<input type="text"/>	State	<input type="text" value="DC"/>	Representative	<input type="text"/>		
Phone	<input type="text" value="202-962-3383"/> <input type="text" value="Ext"/> <input type="text"/>	ZIP Code	<input type="text" value="20002-4239"/>	Rep- Phone	<input type="text"/>		
Level	<input type="text"/>	Web Site	<input type="text" value="www.commuterconnections.org"/>				
Fax	<input type="text" value="(202) 962-3218"/>	DUNS	<input type="text"/>				

Current Programs

Empl- Total **Available Transportation**

TDM Strategies After 7 99	<input type="text"/>	TDM Strategies After 06 11	<input type="text"/>
TDM Strategies Before 7 99	<input type="text" value="Compressed Wk;Formal Telework;Metrochek"/>		
TDM Strategies after 6 02	<input type="text"/>		
TDM Strategies after 6 05	<input type="text"/>		
TDM Strategies After 6 08	<input type="text"/>		

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History of programs

- This tab is available to see when the programs were counted in the TERM analysis
- A valuable piece of information on employers who may have discontinued programs

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Current Programs

Compressed Wk;Formal Telework;Metrohek

Empl- Total **Available Transportation**

1st Survey Date	<input type="text"/>	2nd Survey Date	<input type="text"/>	3rd Survey Date	<input type="text"/>
1st Survey AVO	<input type="text"/>	2nd Survey AVO	<input type="text"/>	3rd Survey AVO	<input type="text"/>
1st Survey Bicycle	<input type="text"/>	2nd Survey Bicycle	<input type="text"/>	3rd Survey Bicycle	<input type="text"/>
1st Survey Carpool	<input type="text"/>	2nd Survey Carpool	<input type="text"/>	3rd Survey Carpool	<input type="text"/>
1st Survey SOV	<input type="text"/>	2nd Survey SOV	<input type="text"/>	3rd Survey SOV	<input type="text"/>
1st Survey Transit	<input type="text"/>	2nd Survey Transit	<input type="text"/>	3rd Survey Transit	<input type="text"/>
1st Survey Vanpool	<input type="text"/>	2nd Survey Vanpool	<input type="text"/>	3rd Survey Vanpool	<input type="text"/>
1st Survey Walk	<input type="text"/>	2nd Survey Walk	<input type="text"/>	3rd Survey Walk	<input type="text"/>

Survey Information

- When a survey is completed by the employer this is a repository of results
- SOV, AVO, SOV – valuable information for measuring impacts of alternative commutes to the worksite.

Returns

- Each Quarter Commuter Connections sends out paper newsletters
- On average out of 5,000 mailed around 350 to 600 are returned
- Double checking information
- Maintenance and data integrity
- TERM Evaluation is this year (fiscal year 17)