

ACT Database Input Tips



Sage ACT!

Contacts

Lookup

Contact Field:

Contains:

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

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Commuter Connections 2013

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

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

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 #



Navigation icons: Back, Forward, New, Call, Meeting, To-Do, Note, History, E-mail, Help Topics

Search Go

Contacts

Detail View List View 7551 of 12096 Commuter Connections 2013

Lookup

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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

Support programs | Web Info | Activities | Relationships | Social Updates |
 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

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	25	Number of Charging Stations	<input type="text"/>
Bicycle Benefit Participants	<input type="text"/>				

- Contacts
- Groups
- Companies
- Calendar
- Task List
- History List
- Opportunities
- Marketing
- Marketplace
- Reports
- Dashboard
- Search
- Welcome

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

Sage ACT!

Search

Contacts

Detail View | List View | 8167 of 13333 | Computer Connections 2013

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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@mwkog.org"/>	Conformity Status	<input type="text"/>
Contact	<input type="text" value="Mr. Mark Hersey"/>			ID/Status	<input type="text" value="UNDELIVERABLE"/>		
Salutation	<input type="text" value="Mr. Hersey"/>			Referred By	<input type="text"/>	Remove Delete Record	<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**

[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](#)

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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Fax	<input type="text" value="(202) 962-3218"/>	DUNS	<input type="text"/>				

Current Programs

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"/>

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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.