

# INTRODUCTION TO ACT!

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Database input tips and other basic information on how to use the Act! Database for TDM Employer Outreach

Revised October 3, 2024

# Act! Login

- URL: <https://act.mwcog.org>
- Washington Area Jurisdictions: Select AtMetroWash\_Employers
- Maryland jurisdictions OUTSIDE the Washington area: Select “MDOT\_EmployerOutreach”
- Enter your username and password

act!

Welcome to Act!  
Please log in.

MDOT\_EmployerOutreach

mark hersey

.....

Remember my username

Log In

Version 24.0.204.0, Update 8

# Act! Basics

- On the right hand side (see below image) select “Commuter Connections 2022” layout
- Critical information for all employer records includes:
  1. Actual name, a title is not a person
  2. Address, including zip
  3. Employee total
  4. Phone number

Contacts

Mr. Mark Hersey

Company: MWCOG | Address: 777 N Capitol St NW, Suite 300 | E-mail: mhersey@mwcoq.org

Contact: Mr. Mark Hersey | ID/Status: UNDELIVERABLE

Salutation: Mr. Hersey | Jurisdiction\*: \*N/A

Title: | Required Field Representative: | Type of Business: | Remove Delete Record: REASON HERE

Department: | City: Washington | State: DC | Archived Employer: |

Phone: 202-962-3383 | Ext: | ZIP Code: 20002-4239

Fax: (202) 962-3218 | Web Site: www.commuterconnections.org | Rep- Phone: |

Level: Level 4

Save

Basic Contact Layout - 1024x768

Basic Contact Layout - 1366x768

Basic Contact Layout - 800x600

Commuter Connections 2013

Commuter Connections 2022

MetroOther

Web Contact Layout Premium

zCommuter Connections

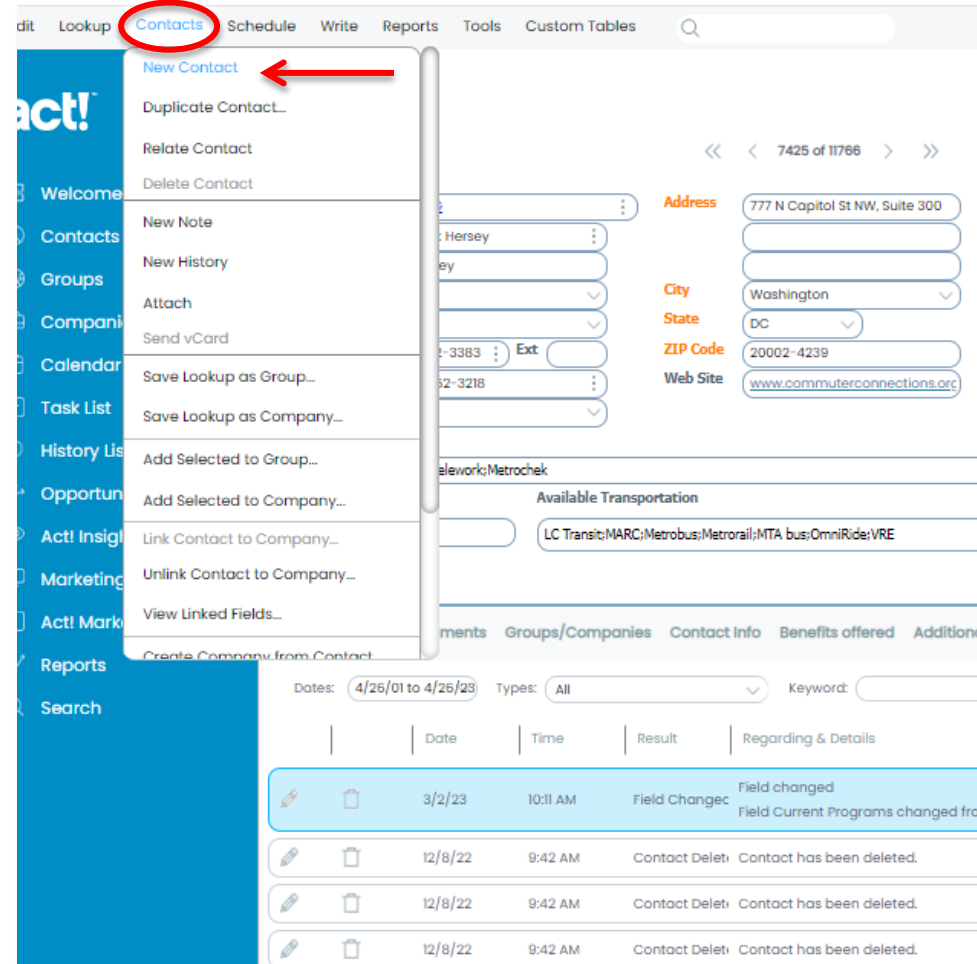
# Helpful Information

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- Below info will be helpful for establishing and maintaining client relationships:
  1. Website – Helpful for updates (such as address changes)
  2. Email – Extremely helpful for outreach
  3. Current Programs – A snapshot of programs currently in existence at worksite
  4. Jurisdiction – Great for sorting searches
- Listing the primary Employer Outreach sales representative's name and phone number is also helpful for coordination purposes.

# New Client Record (1 of 2)

- Select “Contacts” from the main menu and then “New Contact”
- A blank record will popup for data entry (see next slide)



# New Client Record (2 of 2)

- Populate the data fields. The jurisdiction field must have data inputted in order for the record to be valid.
- Save the record before exiting.

The screenshot displays the 'Contacts' form in the Commuter Connections system. The form is titled 'Contacts' and shows '1 of 11767' records. It includes fields for Company, Contact, Salutation, Title, Department, Phone, Fax, Level, Address, City, State, ZIP Code, Web Site, E-mail, ID/Status, Jurisdiction\*, Representative, Rep- Phone, Conformity Status, Remove Delete Record, and Archived Employer. A 'Save' button is circled in red. The Commuter Connections logo and tagline 'A SMARTER WAY TO WORK' are visible. A notice of acceptable use of MWCOC property is also present.

# ID/Status

- This drop down is very helpful to determine current relationship with the client
  - Ex: Active, Closed, Delete (if no longer in business), Undeliverable (if mailed items are no longer receivable)

The screenshot displays the 'Contacts' page for 'Mr. Mark Hersey'. The 'ID/Status' dropdown menu is open, showing the following options:

- UNDELIVERABLE
- Closed (Temporary / Covid)
- Customer
- DELETE
- DO NOT EMAIL
- DO NOT MAIL

Other visible fields include:

- Company: MWCOG
- Contact: Mr. Mark Hersey
- Salutation: Mr. Hersey
- Title: [Empty]
- Department: [Empty]
- Phone: 202-962-3383
- Fax: (202) 962-3218
- Level: Level 4
- Address: 777 N Capitol St NW, Suite 300
- City: Washington
- State: DC
- ZIP Code: 20002-4239
- Web Site: www.commuterconnections.org
- E-mail: mhersey@mwcoq.org
- Type of Business: [Empty]
- Remove Delete Record: REASON HERE
- Archived Employer: [Empty]

Current Programs: Display;Flextime;Formal Telework;Metrochek

Employee Total: 150

Available Transportation: LC Transit;MARC;Metrobus;Metrorail;MTA bus;OmniRide;VRE

Notice of acceptable use of MWCOG property. The Regional ACT! Employer Database is MWCOG property. This application may only be used by authorized users in accordance with the MWCOG IT acceptable use policy, the COG Board Rules of Procedure, and the Commuter Connections Lead Response Process\*. Use of this application may be monitored at any time. By continuing, you indicate your awareness of the abovementioned policies and consent to their terms and conditions.

# Type of Business

- This drop down is a general category selection. Options include:
  - Accommodation and Food Services
  - Administrative and Support and Waste Management and Remediation Services
  - Agriculture, Forestry, Fishing and Hunting
  - Arts, Entertainment, and Recreation
  - Construction
  - Educational Services
  - Finance and Insurance
  - Health Care and Social Assistance
  - Information
  - Management of Companies and Enterprises
  - Manufacturing
  - Mining, Quarrying, and Oil and Gas Extraction
  - Professional, Scientific, and Technical Services
  - Public Administration
  - Real Estate and Rental and Leasing
  - Retail Trade
  - Transportation and Warehousing
  - Utilities
  - Wholesale Trade
  - Other Services (except Public Administration)

The screenshot shows a contact form for Mr. Mark Hersey. The form includes fields for Company (MWCOG), Contact (Mr. Mark Hersey), Salutation (Mr. Hersey), Title, Department, Phone (202-962-3383), Fax ((202) 962-3218), Level (Level 4), Address (777 N Capitol St NW, Suite 300), City (Washington), State (DC), ZIP Code (20002-4239), Web Site (www.commuterconnections.org), E-mail (mhersey@mwcoq.org), ID/Status (UNDELIVERABLE), Jurisdiction\* (\*N/A), Representative, and Rep- Phone. A dropdown menu for 'Type of Business' is open, showing options: Agriculture, Forestry, Fishing, Hunting, Arts, Entertainment, and Recreation, Construction, Educational Services, and Finance and Insurance. The dropdown is highlighted with a red circle and a red box.



# Current Programs

- Select commuter programs that are offered at the client site. See next slide for pre-populated options.

**Contacts** E-mail History

Mr. Mark Hersey 12 of 12 Detail

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

**Contact** Mr. Mark Hersey **ID/Status** UNDELIVERABLE

**Salutation** Mr. Hersey **Jurisdiction\*** \*N/A

**Title** **City** Washington **Required Field**

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

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

**Fax** (202) 962-3218 **Web Site** www.commuterconnections.org

**Level** Level 4

**Type of Business**

**Remove Delete Record** REASON HERE

**Archived Employer**

**Current Programs**

Display: Flextime; Formal Telework; Metrochek

- Attend Seminar/workshop - Employer has attended a seminar or workshop
- Compressed Wk - Compressed Work Week
- CP/VP/WK Benefit - Carpool
- Display - Installs permanent information display
- Distributes/Posts Info - Distributes or Posts commute information
- etc. Employee Transportation Conferences

**COMMUTER CONNECTIONS. A SMARTER WAY TO WORK**

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[Web Info](#) [Activities](#) [Relationships](#) [Opportunities](#)

# Current Programs – Legacy Listing

- Attend seminar/workshop - employer has attended a seminar or workshop
- Compressed work week
- CP/VP/WK Benefit - Carpool
- Display - installs permanent information display
- Distributes/posts info - distributes or posts commute information
- ETC - Employee Transportation Coordinator appointed
- Fair - Employer held transp. Fair or events
- Fee parking - employer institutes parking fee for SOVs
- Flextime - employer implements a flextime policy
- Formal telework
- Free/reduced parking - reduced fee or free parking for carpools and vanpools
- GRH - employer supplements regional GRH program
- Incentive \$ - Employer received funds for commuter program
- Info Contact - Employer requested and receives commute info
- Informal telework - employer allows teleworking
- Meeting - employer met with employer representative
- Metrocheck - Direct Benefits Metrocheck
- OAD-Alert - Employer participates in the ozone action days alert email or fax alert system
- OAD-Comprehensive - employer implements comprehensive Ozone Action Days program
- Other Transit Benefit - transit subsidy other than Metrocheck
- Parking cashout
- Pool Assistance - employer holds pool formation meeting/vp formation
- Pref Parking - Employer offers preferential parking for carpools/vanpools
- Presentation - employer hosted a presentation for employees
- Pretax Metrochek - employee-paid metrocheck
- Racks/Lockers - Bike rack/bike lockers
- RideMatch - employer provided on-site ridematching via Commuter Connections
- Showers
- Shuttle
- Survey - employer conducts commuter survey
- Vanpools - Employer provides or subsidizes vanpools

# Current Programs – MDOT Additions

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- Bikeshare/scooter share - employer subsidizes membership
- Bike Benefit - employer provides financial incentive for bike commuters
- Walk benefit - employer provides financial incentive for walk/run commuters
- Bike Repair - employer installed bike repair stand/materials
- Locker/change room - employer provides for commuters
- Multimodal Last Mile - employer subsidizes 1-5 mile connection between work and other commute mode
- Telework Subsidy - employer offers pro-rated subsidy for home telework costs and/or telework center membership
- Pre-tax Commuter Parking - employer offers pre-tax option for parking at park-and-ride lots
- Subsidized Commuter Parking - employer subsidizes parking at park-and-ride lots
- Commuter Cash - Employer Rewards participant

# Benefits Offered

History Notes Documents Groups/Companies Contact Info **Benefits offered** Additional Benefits History of Programs Survey Data Secondary Contacts Web Info A

<b>Transit Benefit Type</b> SmartBenefits	<b>Telework Program</b> Yes - Formal Policy	<b>Parking Type</b> Employee Paid - Full	<b>Info Display Installed</b> 
<b>Transit Benefit Amount</b> \$280.00	<b>Telework Start Date</b> 7/1/00	<b>Total Parking Spaces</b> 	<b>Multimodal Last Mile Benefit</b> 
<b>Transit Benefit Start Date</b> 7/1/98	<b>Tele- Participants</b> 45	<b>Company Vanpools</b> 	<b>Multimodal last mile Participants</b> 
<b>Benefit Participants</b> 65	<b>Car Vanpool Spaces</b> 2	<b>Started Vanpools</b> 	
<b>Other Benefits</b> 		<b>Shuttle Start Date</b> 	

# Additional Benefits

History Notes Documents Groups/Companies Contact Info Benefits offered **Additional Benefits** History of Programs Survey Data Secondary Contacts Web Info Activities

<b>Capital Bike Share Corporate Partner</b> <input type="text"/>	<b>Transit Screen Installation Date</b> <input type="text"/>	<b>Car Charging Station</b> <input type="checkbox"/>	<b>Maryland Commuter Tax Credit</b> <input type="text"/>
<b>Capital BikeShare Station Installed</b> <input type="text"/>	<b>Compressed Work Week Type</b> <input type="text"/>	<b>Type of Charging Station</b> <input type="text"/>	<b>Maryland Employer Partner</b> <input type="text"/>
<b>Bicycle Benefit</b> <input type="text"/>	<b>compressed work week participants</b> <input type="text"/>	<b># of Charging Stations</b> <input type="text"/>	
<b>Bicycle Benefit Participants</b> <input type="text"/>	<b>Flexible Scheduling</b> <input type="text"/>	<b>Flexible Scheduling Participants</b> <input type="text"/>	
<b>Bike Parking Spaces</b> <input type="text"/>			
<b>Bike Repair and Support</b> <input type="checkbox"/>			

# History of Programs

Contacts
E-mail History

Mr. Mark Hersey 12 of 12

**Company** MWCOG

**Contact** Mr. Mark Hersey

**Salutation** Mr. Hersey

**Title**

**Department**

**Phone** 202-962-3383 Ext.

**Fax** (202) 962-3218

**Level** Level 4

**Address** 777 N Capitol St NW, Suite 300

**City** Washington

**State** DC

**ZIP Code** 20002-4239

**Web Site** www.commuterconnections.org

**E-mail** mhersey@mwcoq.org

**ID/Status** UNDELIVERABLE

**Jurisdiction\*** \*N/A

**Required Field Representative**

**Rep- Phone**

**Type of Business**

**Remove Delete Record** REASON HERE

**Archived Employer**

**Current Programs**

Display: Flextime; Formal Telework; Metrochek

**Employee Total** 150

**Available Transportation** LC Transit; MARC; Metrobus; Metrorail; MTA bus; OmniRide; VRE

History Notes Documents Groups/Companies Contact Info Benefits offered Additional Benefits **History of Programs** Survey Data Secondary Contacts Web Info Activities Relationships Opportunities

TDM Strategies

After 07/1999	After 06/2011
Before 07/1999	After 06/2014
after 6/2002	After 06/2017
after 6/2005	After 06/2020
After 6/2008	After 06/2023



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# Survey Data

- Notable findings from Employer Commuter Surveys can be looped-in to the database.
  - Becomes a repository of results over time.
- Single Occupant Vehicles (SOV) and Average Vehicle Occupancy (AVO)
  - Valuable information for measuring impacts of alternative commutes to the worksite.

The screenshot displays a web application interface for managing survey data. At the top, a navigation bar contains several tabs: 'History', 'Notes', 'Documents', 'Groups/Companies', 'Contact Info', 'Benefits offered', 'Additional Benefits', 'History of Programs', and 'Survey Data'. The 'Survey Data' tab is highlighted with a red circle. Below the navigation bar, the interface is organized into three columns representing different surveys: '1st Survey', '2nd Survey', and '3rd Survey'. Each column contains a series of input fields for various survey categories: 'Date', 'AVO', 'Bicycle', 'Carpool', 'SOV', 'Transit', 'Vanpool', and 'Walk'. The 'Date' fields are dropdown menus, while the others are text input boxes.

# Notes

**Contacts**

Mr. Mark Hersey << < 12 of 12 > >>

**Company** MWCOG  
**Contact** Mr. Mark Hersey  
**Salutation** Mr. Hersey  
**Title**  
**Department**  
**Phone** 202-962-3383 Ext.  
**Fax** (202) 962-3218  
**Level** Level 4

**Address** 777 N Capitol St NW, Suite 300  
**City** Washington  
**State** DC  
**ZIP Code** 20002-4239  
**Web Site** www.commuterconnections.org

**E-mail** mhersey@mwcoq.org  
**ID/Status** UNDELIVERABLE  
**Jurisdiction\*** \*N/A  
**Required Field Representative**  
**Rep- Phone**

**Current Programs** Display;Flextime;Formal Telework;Metrochek  
**Employee Total** 150  
**Empl- Total**  
**Available Transportation** LC Transit;MARC;Metrobus;Metrorail;MTA bus;OmniRide;VRE

Histor **Notes** Documents Groups/Companies Contact Info Benefits offered Additional Benefits History of Programs Survey Data Secondary Contact

Dates: All Dates Keyword: Select Users Show Private Show Preview

	Date	Time	Regarding	
	4/23/24	3:05 PM	Test	Mr. Mark Hersey



# INSERTING NOTES IN ACT!

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Step-by-step approach to adding notes in Act!

https://act.mwcog.org/APFW/Contacts/ContactListView.aspx

Mr. Mark Hersey

ct! Contacts Schedule Write Reports Tools Custom Tables

E-mail History **Note** To-Do Meeting Call New

Detail View List View

Tag Mode Tag All Untag All Lookup Selected Omit Selected

Company	Contact	Phone	Address 1	Address 2	City	State	ZIP Code	E-mail	ID/Status
Watergate at Lan.	<a href="#">Michelle Cooper</a>	(703) 370-7000	211 Yoakum Parkw.		Alexandria	VA	22304	<a href="mailto:gm@watergateatlandmark.com">gm@watergateatlandmark.com</a>	UNDELIVERABLE
Marstel-Day LLC	<a href="#">Richard A. Engel</a>	703-519-3777	1729 King Street	Suite 300	Alexandria	VA	22314	<a href="mailto:re@marstel-day.com">re@marstel-day.com</a>	DELETE;Primary Contact;UNDELIVERABLE
Silverback Strate...	<a href="#">Jessica Flannery</a>	(703) 475-2209	625 N Washingto...	Suite 250	Alexandria	VA	22314		UNDELIVERABLE
Adept Force Grou.	<a href="#">Alyssa Grebe</a>	(571) 732-5562	950 N. Washingto...	Suite 223C	Alexandria	VA	22314	<a href="mailto:alysa.grebe@adeptforcegroup.co...">alysa.grebe@adeptforcegroup.co...</a>	UNDELIVERABLE
Adult Companio...	<a href="#">Marbury Keys</a>	(703) 549-7894	1055 N Fairfax St ...		Alexandria	VA	22314	<a href="mailto:mdk@accfamily.com">mdk@accfamily.com</a>	UNDELIVERABLE
FMK Credit Educa.	<a href="#">Florence M. King</a>	703-684-2005	100 Daingerfield R.	Suite 100	Alexandria	VA	22314	<a href="mailto:KING.Florence.fmk@gmail.com">KING.Florence.fmk@gmail.com</a>	DELETE;UNDELIVERABLE
Ashcraft and Ger	<a href="#">Karen King</a>	703-931-5500	4900 Seminary R...		Alexandria	VA	22311	<a href="mailto:kking@ashcraftlaw.com">kking@ashcraftlaw.com</a>	UNDELIVERABLE
National Associat.	<a href="#">Loan Nguyen</a>	703-836-9340	400 N. Washingto...		Alexandria	VA	22314	<a href="mailto:mikebe@pianet.org">mikebe@pianet.org</a>	UNDELIVERABLE
Back to Health C...	<a href="#">Ms. Shara Posner</a>	(703) 683-7771	900 Prince St		Alexandria	VA	22314	<a href="mailto:drshara@verizon.net">drshara@verizon.net</a>	DO NOT EMAIL;DO NOT MAIL;UNDELIVERABLE
Landon IP Inc	<a href="#">Ms. Carolyn Redding</a>	(703) 486-1150	1900 Duke Street		Alexandria	VA	22314	<a href="mailto:mail@landon-ip.com">mail@landon-ip.com</a>	DELETE;UNDELIVERABLE
Commonwealth ...	<a href="#">Amy Wilson</a>	(703) 683-6191	300 N Lee St		Alexandria	VA	22314	<a href="mailto:awilson@ctp-inc.com">awilson@ctp-inc.com</a>	UNDELIVERABLE
Commonwealth ...	<a href="#">Amy Wilson</a>	(703) 894-1036	300 N Lee St	Third Floor Suite 3.	Alexandria	VA	22314	<a href="mailto:awilson@ctp-inc.com">awilson@ctp-inc.com</a>	UNDELIVERABLE
Coleman & Ragla.	<a href="#">David Woodbury</a>	703-739-4200	602 Cameron Str...		Alexandria	VA	22314	<a href="mailto:DWoodbury@cartercoleman.com">DWoodbury@cartercoleman.com</a>	UNDELIVERABLE

## Contacts

Tag Mode Tag All Untag All | Lookup Selected Omit Selected

Company	Contact	Phone	Address 1	Address 2	City	State	ZIP Code	E-mail
Watergate at Lan...	<a href="#">Michelle Cooper</a>	(703) 370-7000	211 Yoakum Parkw...		Alexandria	VA	22304	<a href="#">gm@wat...</a>
Arstel-Day LLC	<a href="#">Richard A. Engel</a>	703-519-3777	1729 King Street	Suite 300	Alexandria	VA	22314	<a href="#">re@mars...</a>
Verback Strate...	<a href="#">Jessica Flannery</a>	(703) 475-2209	625 N Washingto...	Suite 250	Alexandria	VA	22314	
Lept Force Grou...	<a href="#">Alyssa Grebe</a>	(571) 732-5562	950 N. Washingto...	Suite 223C	Alexandria	VA	22314	<a href="#">alyssa.g...</a>
Mult Companio...	<a href="#">Marbury Keys</a>	(703) 549-7894	1055 N Fairfax St ...		Alexandria	VA	22314	<a href="#">mdk@ac...</a>
AK Credit Educa...	<a href="#">Florence M. King</a>	703-684-2005	100 Daingerfield R...	Suite 100	Alexandria	VA	22314	<a href="#">KING.Flo...</a>
hcraft and Gere	<a href="#">Karen King</a>	703-931-5500	4900 Seminary R...		Alexandria	VA	22311	<a href="#">kking@...</a>
ntional Associat...	<a href="#">Loan Nauven</a>	703-836-9340	400 N. Washingto...		Alexandria	VA	22314	<a href="#">mikeba@bidnet.org</a>

act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba2-4229-873...

https://act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba...

Contact: Woodbury, David [Coleman & Ragland] **Contact...**

Date: 2/27/24 Time: 1:04 PM

Attachment:  Attach...

Share with:  ...

Record Manager: Mr. Mark Hersey

Details:

abc Arial 13px A B I U abc

Private

OK Cancel

## Contacts

Tag Mode Tag All Untag All Lookup Selected Omit Selected

Company	Contact	Phone	Address 1	Address 2	City	State	ZIP Code	E-mail
Watergate at Lan...	<a href="#">Michelle Cooper</a>	(703) 370-7000	211 Yoakum Parkw...		Alexandria	VA	22304	<a href="#">gm@wat...</a>
Marstel-Day LLC	<a href="#">Richard A. Engel</a>	703-519-3777	1729 King Street	Suite 300	Alexandria	VA	22314	<a href="#">re@mar...</a>
Silverback Strate...	<a href="#">Jessica Flannery</a>	(703) 475-2209	625 N Washingto...	Suite 250	Alexandria	VA	22314	
Adept Force Grou...	<a href="#">Alyssa Grebe</a>	(571) 732-5562	950 N. Washingto...	Suite 223C	Alexandria	VA	22314	<a href="#">alyssa.g...</a>
Adult Companio...	<a href="#">Marbury Keys</a>	(703) 549-7894	1055 N Fairfax St ...		Alexandria	VA	22314	<a href="#">mdk@ac...</a>
FMK Credit Educa...	<a href="#">Florence M. King</a>	703-684-2005	100 Daingerfield R...	Suite 100	Alexandria	VA	22314	<a href="#">KING.Flor...</a>
Ashcraft and Gere	<a href="#">Karen King</a>	703-931-5500	4900 Seminary R...		Alexandria	VA	22311	<a href="#">kking@...</a>
National Associat...	<a href="#">Loan Nguyen</a>	703-836-9340	400 N. Washingto...		Alexandria	VA	22314	<a href="#">mikebe@planet.org</a>

Select Contacts - Work - Microsoft Edge

https://act.mwcoq.org/APFW/EntityPicker/PickerDialog.aspx?guid=6d0efb30-64fc-4313-9...

Select from:

- All Contacts
- All Contacts
- Current Lookup
- Groups
- Companies

Search

Share with:  Contact  Company

Record: [A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)

Contacts to select from:

Name	Company
...	KIHOMAC Inc.
...	MOM's Organic Market
...	Conduent - Germanto...
...	Axiom at Cabin Branc...
...	Washington Nephrolo...
...	Bluepoint Medical As...
...	Home Goods - Gaith...
...	White Oak Towers A...
...	smeco
...	Beteseb Restaurant
...	Learning Without Tea...
...	Saint Gobain Perform...
...	Executive Healthcare...
...	Bageltowne Deli
...	United States Geosp...
...	Jeet Financial Servi...
...	Lead Drive Alexandria

Selected contacts:

Name	Company
Woodbury, David	Coleman & Ragland

1 of 384

1 of 1

New Contact... OK Cancel

Contacts/ContactListView.aspx

ports Tools Custom Tables

All Untag All Lookup Selected Omit Selected

Contact	Phone	Address 1	Address 2	City	State	ZIP Code	E-mail
<a href="#">Michelle Cooper</a>	(703) 370-7000	211 Yoakum Parkw.		Alexandria	VA	22304	<a href="#">gm@wat</a>
<a href="#">Richard A. Engel</a>	703-519-3777	1729 King Street	Suite 300	Alexandria	VA	22314	<a href="#">re@mars</a>
<a href="#">Jessica Flannery</a>	(703) 475-2209	625 N Washingto...	Suite 250	Alexandria	VA	22314	
<a href="#">Alyssa Grebe</a>	(571) 732-5562	950 N. Washingto...	Suite 223C	Alexandria	VA	22314	<a href="#">alyssa.g</a>
<a href="#">David Woodbury Keys</a>	(703) 549-7894	1055 N Fairfax St ...		Alexandria	VA	22314	<a href="#">mdk@ac</a>
<a href="#">Florence M. King</a>	703-684-2005	100 Daingerfield R...	Suite 100	Alexandria	VA	22314	<a href="#">KING.Flor</a>
<a href="#">Sharon King</a>	703-931-5500	4900 Seminary R...		Alexandria	VA	22311	<a href="#">kking@a</a>
<a href="#">Loan Nguyen</a>	703-836-9340	400 N. Washingto...		Alexandria	VA	22314	<a href="#">mikebe@planet.org</a>
<a href="#">Shara Posner</a>	(703) 683-7771	900 Prince St		Alexandria	VA	22314	<a href="#">drshara@verizon.net</a>

UNDELIVERABLE  
DO NOT EMAIL;DO NOT MAIL;UNDELIVERABLE

Select Contacts - Work - Microsoft Edge

https://act.mwcog.org/APFW/EntityPicker/PickerDialog.aspx?guid=6d0efb30-64fc-4313-9...

Select from: Current Lookup

Date:

Look for: Search

Contact  Company

ABCDEFGHIJKLMNOPQRSTUVWXYZ

Contacts to select from:

Name	Company
Cooper, Michelle	Watergate at Landmark
Engel, Richard	Marstel-Day LLC
Flannery, Jessica	Silverback Strategies
Grebe, Alyssa	Adept Force Group
Keys, Marbury	Adult Companion Care L...
King, Florence	FMK Credit Education C...
King, Karen	Ashcraft and Gerel
Nguyen, Loan	National Association of ...
Posner, Shara	Back to Health Center
Redding, Carolyn	Landon IP Inc
Wilson, Amy	Commonwealth Trading ...
Wilson, Amy	Commonwealth Trading ...
Woodbury, David	Coleman & Ragland

Selected contacts:

Name	Company
Nguyen, Loan	National Association of ...
Wilson, Amy	Commonwealth Trading
Cooper, Michelle	Watergate at Landmark
Woodbury, David	Coleman & Ragland
King, Florence	FMK Credit Education C...
Keys, Marbury	Adult Companion Care L...
Grebe, Alyssa	Adept Force Group
Posner, Shara	Back to Health Center
Redding, Carolyn	Landon IP Inc
King, Karen	Ashcraft and Gerel
Flannery, Jessica	Silverback Strategies
Wilson, Amy	Commonwealth Trading
Engel, Richard	Marstel-Day LLC

1 of 1

New Contact... OK Cancel

kup Selected Omit Selected

Phone	Address 1	Address 2	City	State	ZIP Code	E-mail
(703) 370-7000	211 Yoakum Parkw.		Alexandria	VA	22304	gm@wat
703-519-3777	1729 King Street	Suite 300	Alexandria	VA	22314	re@mar
(703) 475-2209	625 N Washingto...	Suite 250	Alexandria	VA	22314	
(571) 732-5562	950 N. Washingto...	Suite 223C	Alexandria	VA	22314	alysa.g
(703) 549-7894	1055 N Fairfax St ...		Alexandria	VA	22314	mdk@ac
703-684-2005	100 Daingerfield R...	Suite 100	Alexandria	VA	22314	KING.Flor
703-931-5500	4900 Seminary R...		Alexandria	VA	22311	kking@a
703-836-9340	400 N. Washingto...		Alexandria	VA	22314	mikebe@pianet.org

act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba2-4229-873...

https://act.mwcog.org/APFW/Notes/InsertNoteDialog.aspx?entity=ContactList&id=f3e92f7d-7ba...

Contact: Cooper, Michelle [Watergate at Landmark]; Engel, Richard [Marstel-Day LLC]; Flannery, ... Contact...

Date: 2/27/24 Time: 1:04 PM

Attachment: Attach...

Share with: ...

Record Manager: Mr. Mark Hersey

Details:

Arial 13px A B I U abc

Testing again

Private

OK Cancel

# RUNNING A REPORT IN ACT!

---

Step-by-step approach to customizing queries and filtering results in Act!

# Preparing Your Dataset

---

- Run an advanced query
- The results from the query will provide your dataset for the report you want to run
- The predominant report used by the group is the Notes/History
- In the next few slides you will be provided generic report generation guidelines



### Contacts

Mr. Mark Hersey

12 of 13

Detail View List View

**Company** MWCOC

**Contact** Mr. Mark Hersey

**Salutation** Mr. Hersey

**Title**

**Department**

**Phone** 202-962-3383 Ext

**Fax** (202) 962-3218

**Level** Level 4

**Address** 777 N Capitol St NW, Suite 300

**City** Washington

**State** DC

**ZIP Code** 20002-4239

**Web Site** www.commuterconnections.org

**E-mail** mhersey@mwcog.org

**ID/Status** UNDELIVERABLE

**Jurisdiction\*** \*N/A

**Representative**

**Rep- Phone**

Type of Busi

Remove Delete Recor

Archived Employer



#### Current Programs

Display;Flextime;Formal Telework;Metrochek

#### Employee Total

Empl- Total 150

#### Available Transportation

LC Transit;MARC;Metrobus;Metrorail;MTA bus;OmniRide;VRE

Notice of accep property. This acceptable use Response Proc your awarenes

[Search on Keywords...](#)

**Advanced Query...**

Users

**Last Edited by** Mr. Mark Hersey

**Create Date** 2/12/24

**Letter Date**

**Edit Date** 7/23/24

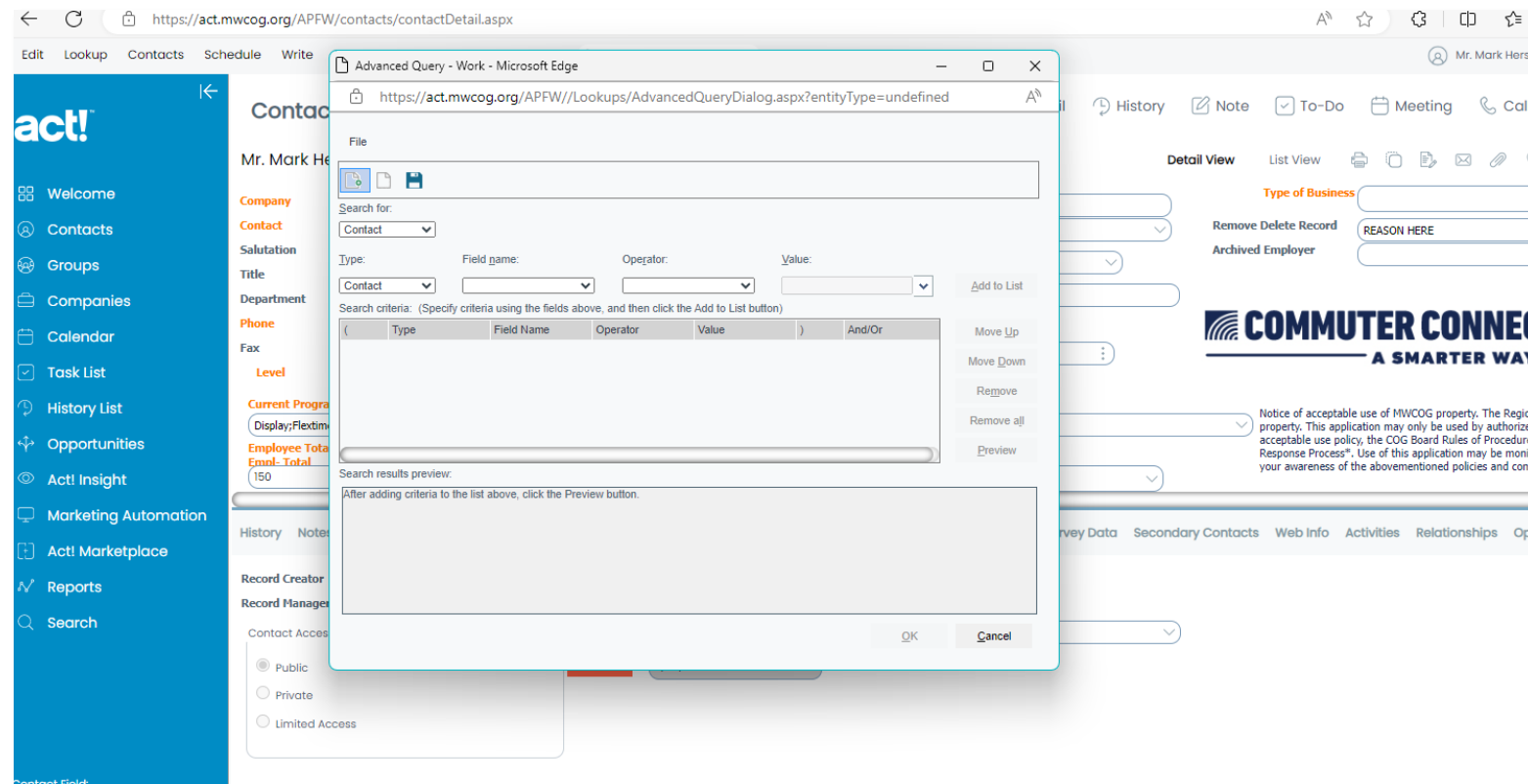
**Admin Jurisdiction**

**Admin Conformity**

**Admin\_Contender**

# Selecting Criteria

- In the dialogue box you will be able to select your “drill down” criteria
- In the following slide you’ll see what and where you’ll select your directives



https://act.mwcog.org/APFW/contacts/contactDetail.aspx

Advanced Query - Work - Microsoft Edge

https://act.mwcog.org/APFW//Lookups/AdvancedQueryDialog.aspx?entityType=undefined

File

Search for:

Contact

Type:  Field name:  Operator:  Value:

Contact

Add to List

Search criteria: (Specify criteria using the fields above, and then click the Add to List button)

(	Type	Field Name	Operator	Value	)	And/Or

Move Up

Move Down

Remove

Remove all

Preview

Search results preview:

After adding criteria to the list above, click the Preview button.

OK Cancel

Mr. Mark He

Company

Contact

Salutation

Title

Department

Phone

Fax

Level

Current Program

Display;Flextime

Employee Total

Empl. Total

150

History

Notes

Record Creator

Record Manager

Contact Access

Public

Private

Limited Access

Detail View

List View

Type of Business

Remove Delete Record

REASON HERE

Archived Employer

COMMUTER CONNEC

A SMARTER WAY

Notice of acceptable use of MWCOC property. The Region property. This application may only be used by authorized acceptable use policy, the COG Board Rules of Procedure, Response Process\*. Use of this application may be monitored your awareness of the abovementioned policies and conse

Survey Data

Secondary Contacts

Web Info

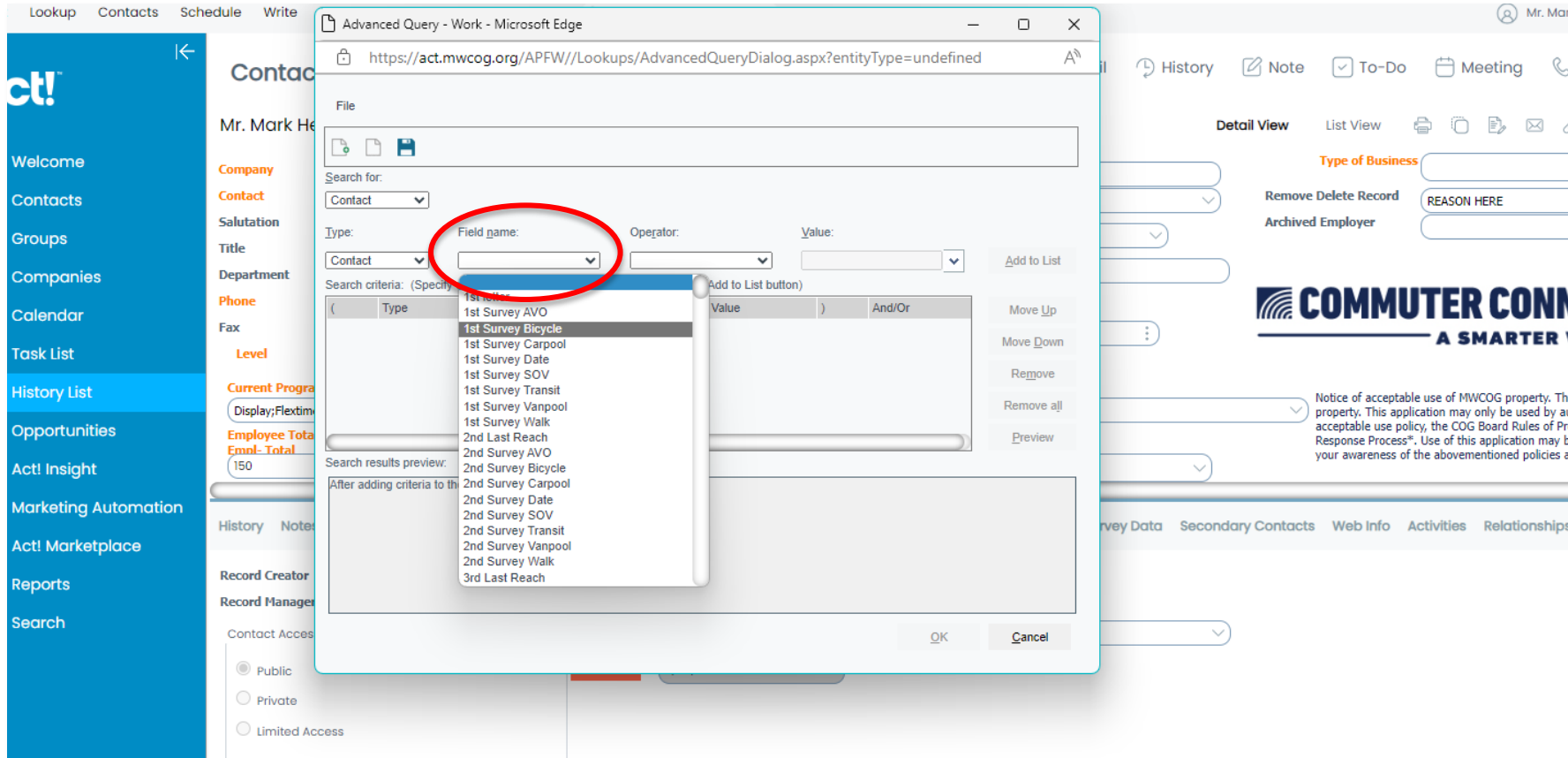
Activities

Relationships

Opp

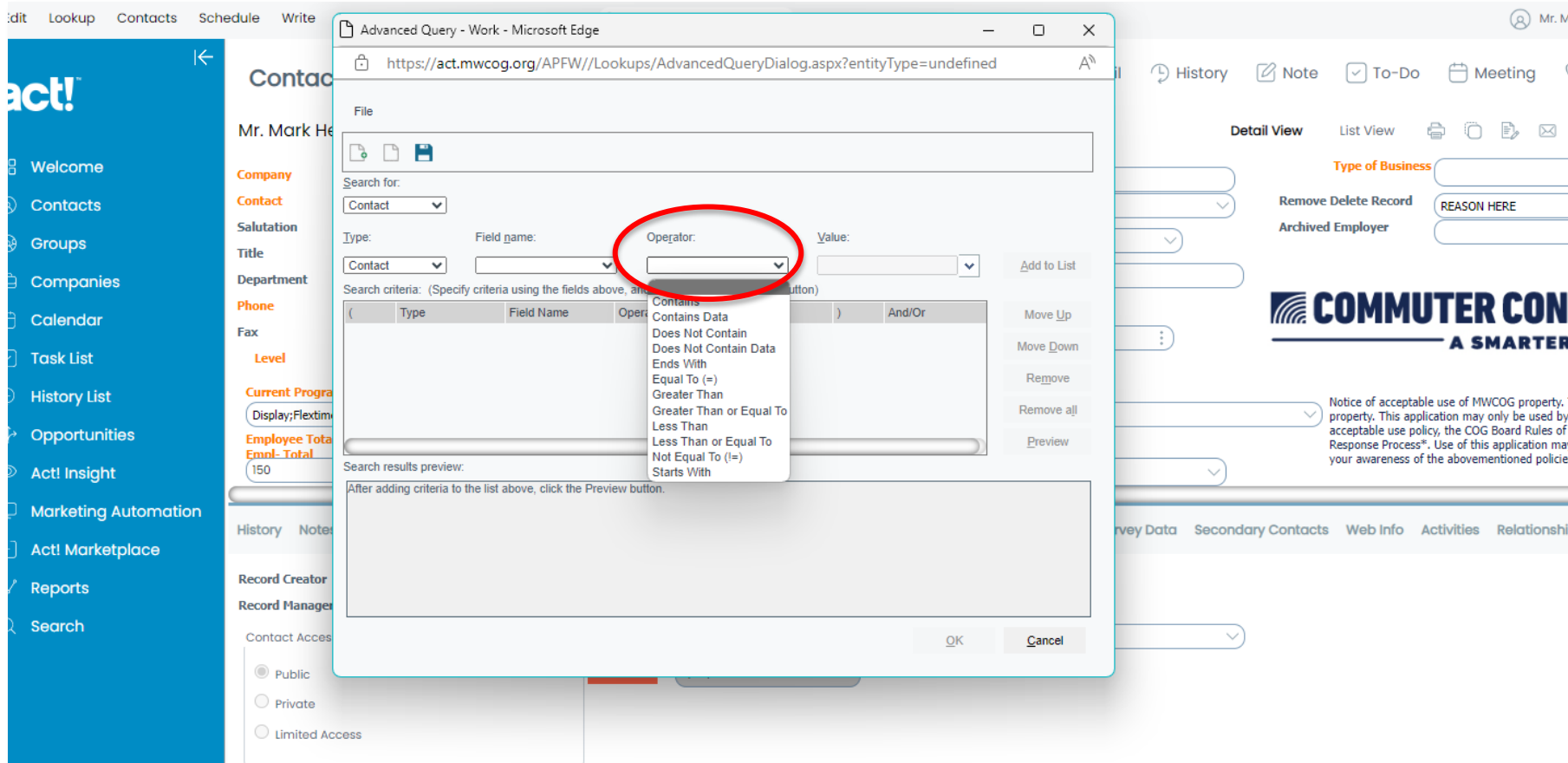
# Advanced Query - Fields

- The field name drop down you'll select which field you want to use to search.



# Advanced Query - Operator

- The field name drop down you'll select which field you want to use to search.



# Advanced Query - Value

- The value will determine the characters you want to use

The screenshot displays the 'Advanced Query' dialog box in a Microsoft Edge browser window. The dialog is titled 'Advanced Query - Work - Microsoft Edge' and has the URL 'https://act.mwco.org/APFW//Lookups/AdvancedQueryDialog.aspx?entityType=undefined'. The 'Search for:' dropdown is set to 'Contact'. The 'Type:' dropdown is also set to 'Contact', and the 'Field name:' dropdown is set to 'address'. The 'Operator:' dropdown is set to 'Contains'. The 'Value:' field is empty and is highlighted with a red circle. Below the search criteria, there is a table with columns 'Type', 'Field Name', 'Operator', 'Value', and 'And/Or'. The 'Search results preview' section is empty. The background shows the Act! interface with a contact record for Mr. Mark He. The contact record includes fields for Company, Contact, Salutation, Title, Department, Phone, Fax, Level, Current Program, Employee Total, and Email Total. The Act! logo and navigation menu are visible on the left side of the interface.

# Advanced Query – Creating Your List

- You will now create your search string – click on add to list

The screenshot displays the Act! database interface. A contact record for Mr. Mark Hershey is visible in the background. Overlaid on this is the 'Advanced Query' dialog box. The dialog box has a 'Search for:' dropdown set to 'Contact'. Below this, there are fields for 'Type:', 'Field name:', 'Operator:', and 'Value:'. The 'Type:' dropdown is set to 'Contact', the 'Field name:' dropdown is set to 'address', and the 'Operator:' dropdown is set to 'Contains Data'. The 'Add to List' button is circled in red. The dialog box also contains a table for search criteria and a 'Search results preview' section.

(	Type	Field Name	Operator	Value	)	And/Or
(	Contact	address	Contains Data		)	End

# Advanced Query – Running Your Query

- You'll select the okay option and run the report – you can save the query or not save it

The screenshot shows the Act! Advanced Query dialog box. A red arrow points to the 'Yes' button in a 'Do you want to save the current query?' message box. Another red circle highlights the 'OK' button at the bottom of the dialog box.

Then choose to save or discard.

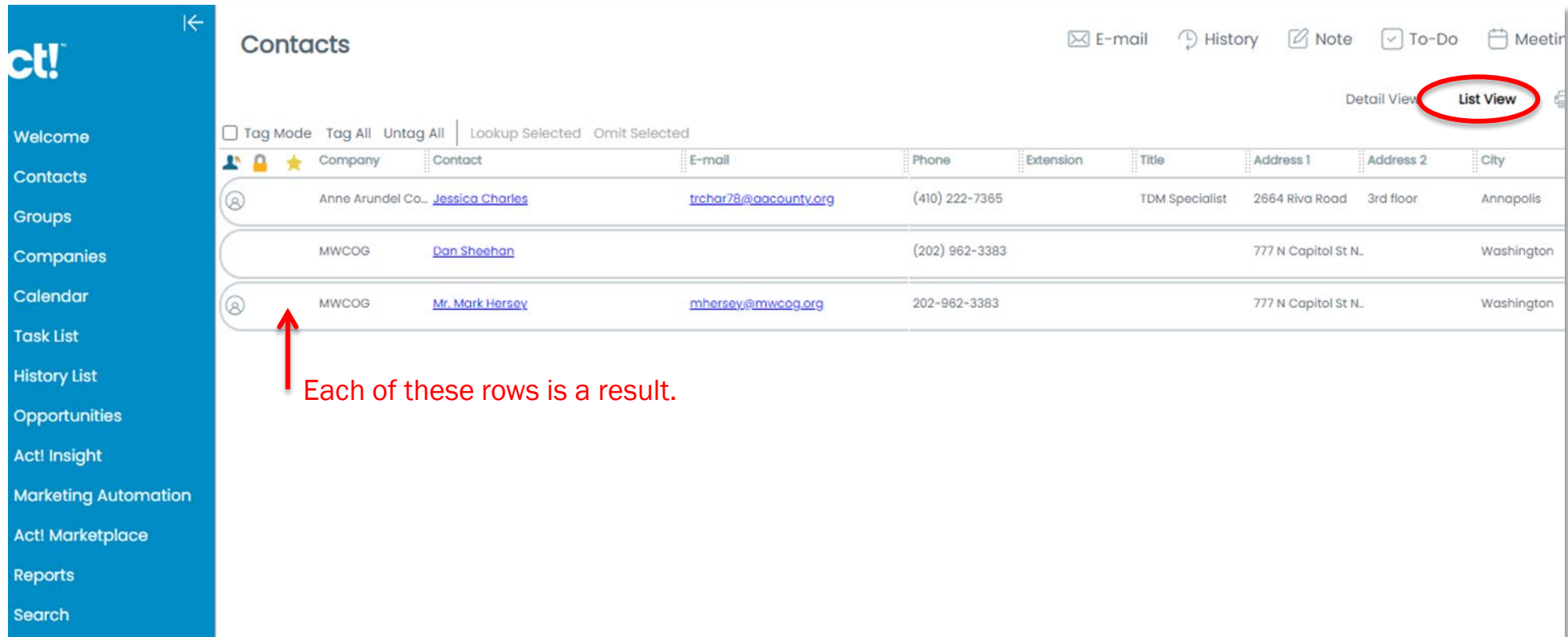
First click "OK"

Type	Field Name	Operator	Value	And/Or
Contact	address	Contains Data		End



# Advanced Query – Results

- Your results will appear like this – the list view



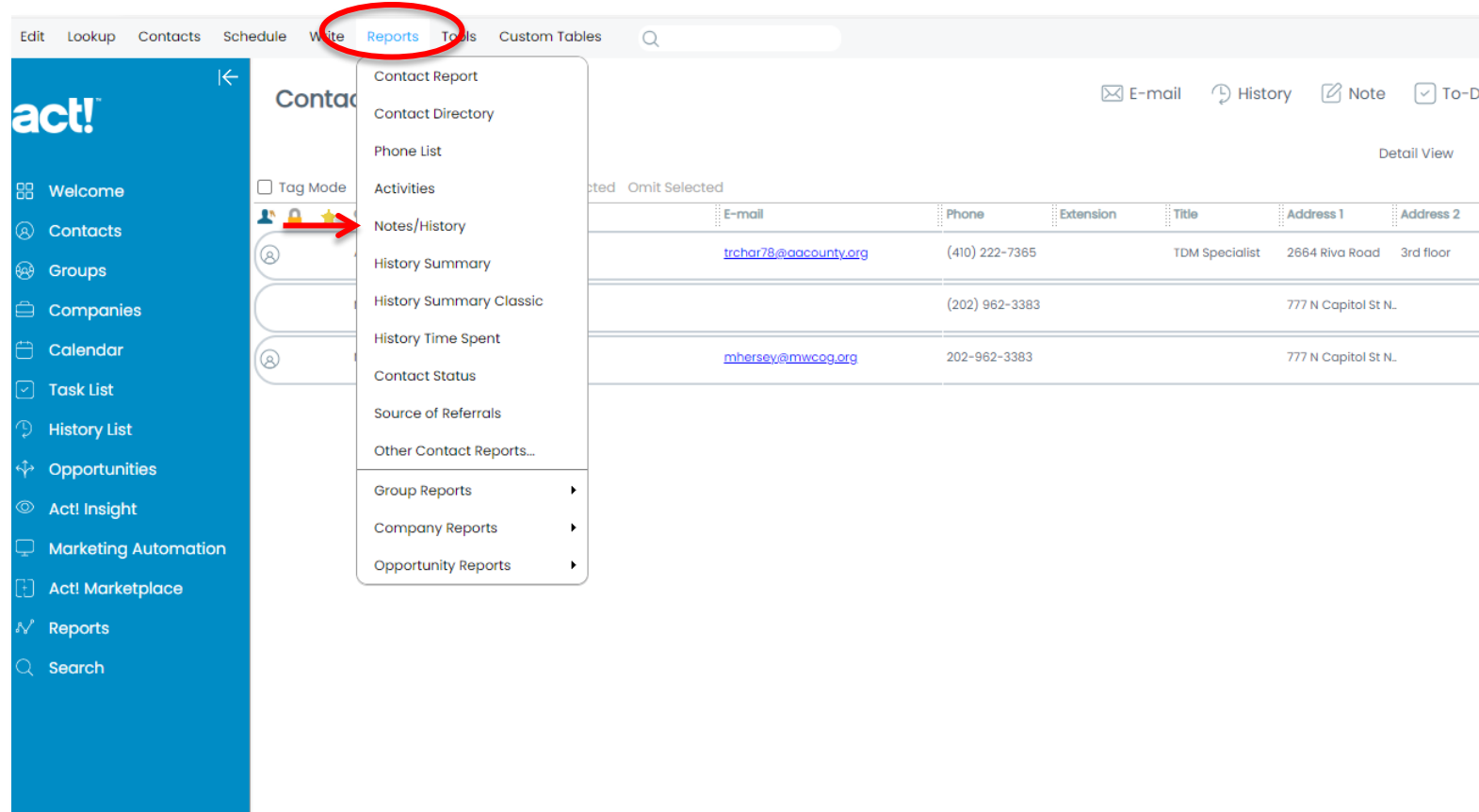
The screenshot displays the Act! Contacts interface. On the left is a blue navigation sidebar with the Act! logo and menu items: Welcome, Contacts, Groups, Companies, Calendar, Task List, History List, Opportunities, Act! Insight, Marketing Automation, Act! Marketplace, Reports, and Search. The main content area is titled 'Contacts' and includes a top navigation bar with icons for E-mail, History, Note, To-Do, and Meeting. Below this is a toolbar with 'Tag Mode', 'Tag All', 'Untag All', 'Lookup Selected', and 'Omit Selected'. The 'List View' button is circled in red. The contact list is a table with columns: Company, Contact, E-mail, Phone, Extension, Title, Address 1, Address 2, and City. Three rows are visible, with a red arrow pointing to the first row.

Company	Contact	E-mail	Phone	Extension	Title	Address 1	Address 2	City
Anne Arundel Co...	<a href="#">Jessica Charles</a>	<a href="mailto:trchar78@accounty.org">trchar78@accounty.org</a>	(410) 222-7365		TDM Specialist	2664 Riva Road	3rd floor	Annapolis
MWCOG	<a href="#">Dan Sheehan</a>		(202) 962-3383			777 N Capitol St N.		Washington
MWCOG	<a href="#">Mr. Mark Hersey</a>	<a href="mailto:mhersey@mwcoq.org">mhersey@mwcoq.org</a>	202-962-3383			777 N Capitol St N.		Washington

Each of these rows is a result.

# Running a Report

- You'll now select a report option – we'll use the notes/history option



The screenshot shows the Act! database interface. The top navigation bar includes 'Edit', 'Lookup', 'Contacts', 'Schedule', 'Write', 'Reports', 'Tools', and 'Custom Tables'. The 'Reports' menu is open, and 'Notes/History' is highlighted with a red arrow. The main content area displays a table of contact information with columns for E-mail, Phone, Extension, Title, Address 1, and Address 2. The table contains three rows of data.

E-mail	Phone	Extension	Title	Address 1	Address 2
<a href="mailto:trchar78@gacounty.org">trchar78@gacounty.org</a>	(410) 222-7365		TDM Specialist	2664 Riva Road	3rd floor
	(202) 962-3383			777 N Capitol St N.	
<a href="mailto:mhersey@mwccg.org">mhersey@mwccg.org</a>	202-962-3383			777 N Capitol St N.	

# Running a Report

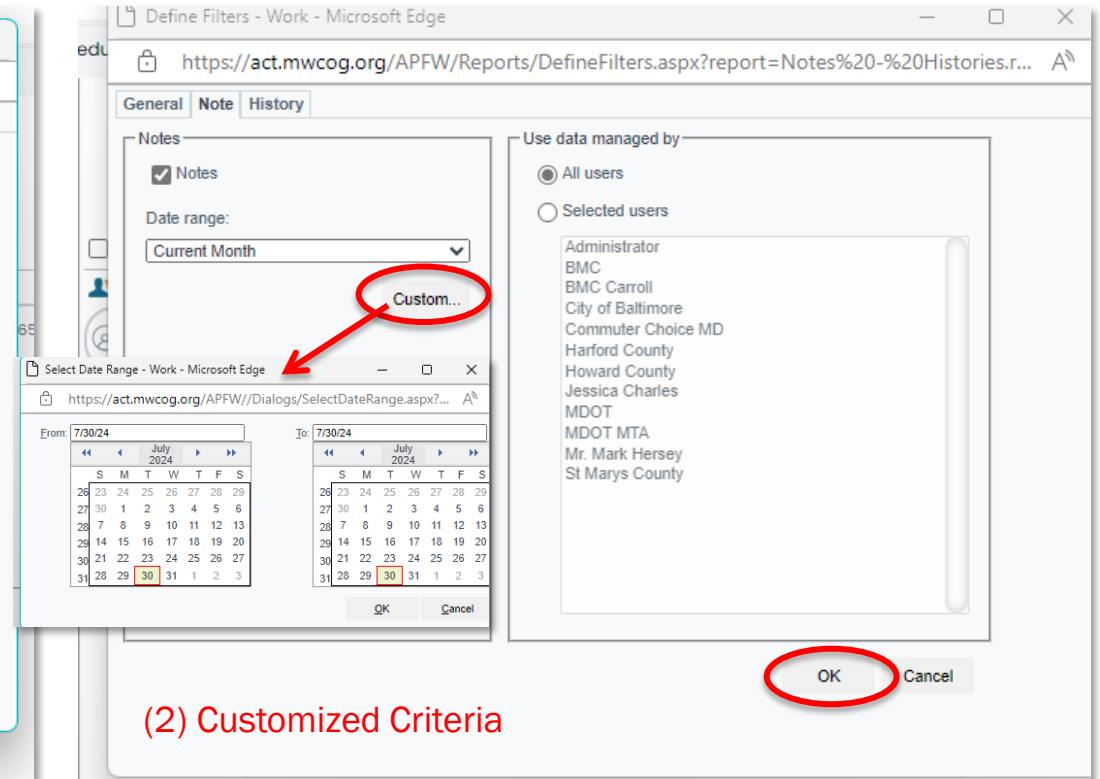
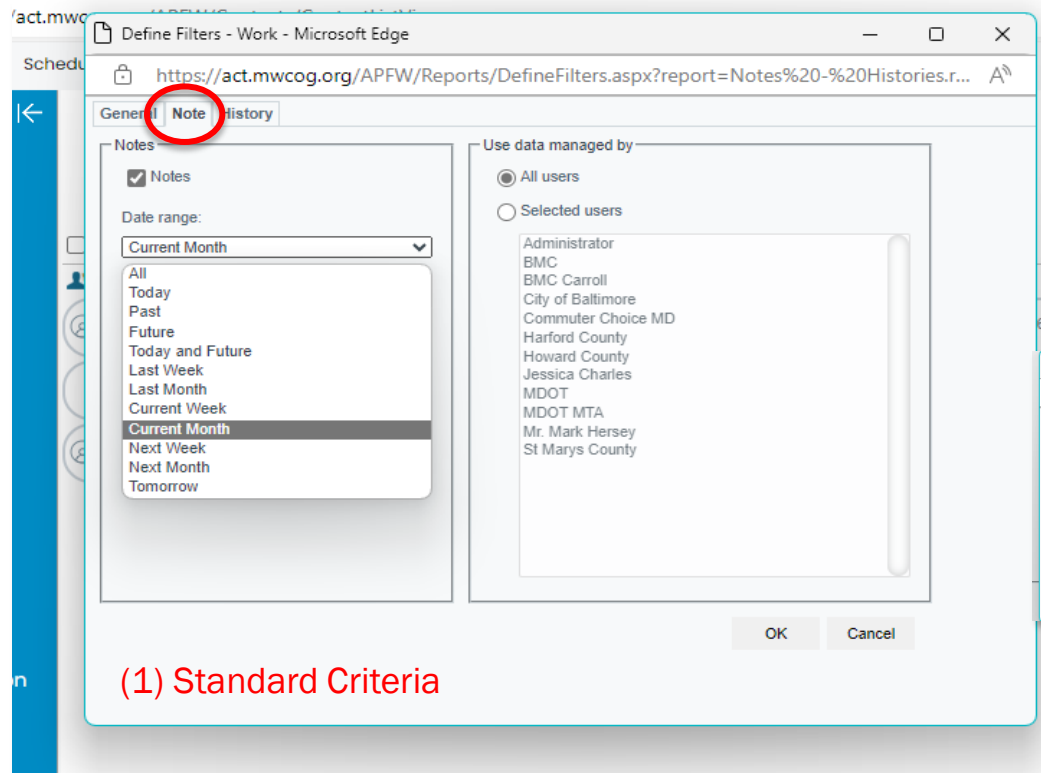
- Here you'll select your report criteria – options current contact, current lookup or all

The screenshot shows the 'Define Filters' dialog box in the Act! software. The 'General' tab is active, and the 'Create report for' section has three radio buttons: 'Current Contact', 'Current Lookup' (which is selected and circled in red), and 'All Contacts'. The 'Use data managed by' section has two radio buttons: 'All users' (selected) and 'Selected users'. Below this is a list of users: Administrator, BMC, BMC Carroll, City of Baltimore, Commuter Choice MD, Harford County, Howard County, Jessica Charles, MDOT, MDOT MTA, Mr. Mark Hersey, and St Marys County. At the bottom left of the dialog, the 'Exclude My Record' checkbox is checked, with a red arrow pointing to it and the text 'Ensure box is checked'. The background shows a contact list with columns for Extension, Title, Address 1, Address 2, and City.

Extension	Title	Address 1	Address 2	City
65	TDM Specialist	2664 Riva Road	3rd floor	Annapolis
83		777 N Capitol St N.		Washington
83		777 N Capitol St N.		Washington

# Running a Report

- Next you will select criteria for your notes/history both tabs are identical so choose similar criteria – date range are generic you can also choose customized criteria then click ok



# Running a Report - Results

- Here is what your result will look like

**Notes/History**

Mr. Mark Hersey, MWCOG  
777 N Capitol St NW, Suite 300  
Washington, DC 20002-4239

---

Date Range - 7/1/2024 - 7/31/2024

Contact

Jessica Charles      Anne Arundel County Office of

Histories

Date	Time	Result	Regarding & Details	Record Manager
7/23/2024	9:58 AM	Field Changed	Field changed Field Salutation changed from "" to "- Jessica"	Jessica Charles
7/23/2024	9:58 AM	Field Changed	Field changed Field Salutation changed from "- Jessica" to "Jessica"	Jessica Charles
7/23/2024	9:58 AM	Field Changed	Field changed Field Contact changed from "Anne Arundel County - Jessica Charles" to "Jessica Charles"	Jessica Charles
7/23/2024	9:57 AM	Field Changed	Field changed Field Salutation changed from "" to ""	Jessica Charles
7/23/2024	9:57 AM	Field Changed	Field changed Field Contact changed from "Jessica Charles-Allen" to "Anne Arundel County - Jessica Charles"	Jessica Charles
7/23/2024	9:40 AM	Field Changed	Field changed Field ID/Status changed from "" to "UNDELIVERABLE"	Jessica Charles
7/23/2024	9:35 AM	Field Changed	Field changed Field Current Programs changed from "" to "Flextime;GRH;Incentive \$;Presentation"	Jessica Charles
7/23/2024	9:30 AM	Field Changed	Field changed Field Salutation changed from "Jessica" to ""	Jessica Charles
7/23/2024	9:29 AM	Field Changed	Field changed Field Web Site changed from "Anne Arundel County Office of Traanportation" to "www.aacounty.org/transit"	Jessica Charles
7/23/2024	9:26 AM	Field Changed	Field changed Field Type of Business changed from "Transportation and Wharehousing" to ""	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Company changed from "" to "Anne Arundel County Office of Transportation"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Salutation changed from "Anne" to "Jessica"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Contact changed from "Anne Arundel" to "Jessica Charles-Allen"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Web Site changed from "" to "Anne Arundel County Office of Traanportation"	Jessica Charles
7/23/2024	9:25 AM	Field Changed	Field changed Field Title changed from "" to "TDM Specialist"	Jessica Charles

Created 7/30/2024 at 12:53 PM
Page 1 of 1

## Mark Hersey

TDM Employer Outreach Program Specialist

(202) 962-3383

mhersey@mwkog.org

[commuterconnections.org](https://www.commuterconnections.org)

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Washington, DC 20002