

ACT! Administrator Job Description

An experienced ACT! Database Administrator is a valuable addition to a company with aggressive growth plans. Once trained, this person becomes the "go-to" database manager, the mini-marketing department and a turbo-charged executive assistant. The position offers a great resume-building opportunity and, because of ACT!'s dominance in the marketplace, you can typically recruit ACT! Admins from a pool of qualified job candidates. On a recent Monster.com job search for "marketing," for example, Aviva found previous ACT! experience listed on 12% of the posted resumes!

This is a checklist of common issues ACT! database users must address. If you don't have an ACT! Administrator, who will be assigned to handle these things? Here's how you can create specific job duties for a typical ACT! Administrator.

1. **Duplicate Checking.** Make sure there are no duplicate records in the database. This can be achieved by using the "Scan for Duplicates" feature from the Tools menu. However, if the new entry has a contact or company name spelled with a variation, then duplicate checking may not catch it. Train users to look up records 2 ways before entering a new one, such as by Last name and by phone number. This will cut down on the number of duplicates going into ACT!
2. **Clear blank records** created by users. Advise users what they did wrong to create blanks to prevent future blanks from being added to the database.
3. **Casing.** Ensure that all field entries have proper casing. Don't type in all caps. This information will appear as entered in your personalized correspondence.
4. **Complete Data Entry of each Record.** The Administrator can also be responsible for checking the data entered into newly created records. If the information is incomplete, the user who created the record should be "re-educated" on completing all necessary fields.
 - a. If data entry of lots of business cards is required on an ongoing basis, invest in a business card scanner (www.aviva-aviva.com/catalog.html) which can scan and enter about 100 cards per hour directly into ACT!
5. **Database Maintenance.** Perform database *maintenance* on a regular basis. We recommend a minimum of weekly. To perform the maintenance:
 - a. Compress and Reindex the database.
 - b. Save a complete Contact Report (with ALL Fields and ALL Activities and ALL Histories) as a text file. Do this *once a month* to ensure that all of the linkages in the BLB file are fully operational.
 - c. Review Notes, Histories and Attachments regularly and delete any repetition.
 - d. Check Activities, Tasks and Sales Opportunities that have not been cleared and clear them.
 - e. Check that remote databases are maintained on a regular basis.

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- f. Use ACT! Diagnostics to perform database tests and generate system reports periodically.
 - g. Apply all Patches and Upgrades when necessary. The Administrator should keep informed of when new updates (free) and/or upgrades become available. He/she should upgrade users' systems whenever applicable.
6. **Back Up Database.** Perform a database *backup* on a weekly basis, if not daily. Even if a backup is made on the server where the database is stored, we still recommend you backup the ACT! database as outlined below. Then your server will make a backup of the ACT! backup along with the rest of your network files.
7. **Add New ACT! Users.** Ensure each workstation is correctly configured for new ACT! users and meets minimum system specification. The Administrator is responsible for:
 - a. Adding new users in the ACT! Database
 - b. Helping to set up each user's workstation preferences.
 - c. Making sure each workstation has the correct layout.
 - d. Setting up Synchronization if desired.
8. **Manage Groups.** Run group membership rules. Use "Groupless" by <http://nwoods.com/ACT/Index.htm> to find records that have no group assignment. Use "UnGroup" by www.tnhg.com to take a record or groups of record out of their assigned groups. Troubleshoot using AutoAdmin II, if your company uses this synchronization add-on.
9. **Manage screen design.**
 - a. Create new fields / add new fields to layout. The Administrator should be the only one to make changes to the database and/or layout by adding or removing fields.
 - b. Monitor user requests for feature enhancements and additional field requirements.
 - c. Check drop-down menus for spurious data periodically. The Administrator should be the only user to add to dropdown menus. This maintains the integrity of the master database and prevents errors from being added through synchronization. If users are allowed to modify the drop-down lists, then the Administrator should audit these regularly.
10. **Sales Opportunities.** Edit Sales Opportunity stages to match company preferences.
11. **Marketing and Customer Care Campaigns.** Since increasing customer communication is the primary benefit of an ACT! System, the ACT! Admin can be the "mini-marketing department" utilizing ACT!'s Activity Series feature. The Activity Series allows users to assign "drip marketing" letter, fax and email campaigns to individual or groups of customer and prospect records, such as correspondence with customers after a sale. Additionally, Admin duties would include

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creating/modifying letter and email templates and running marketing analysis reports after a campaign to track results.

12. Prospect Research, Mailing Lists, Direct Mail

- a. Call Aviva for free mailing list information that targets your best business or consumer prospects. Purchase a mailing list that imports directly into ACT! and assign direct mail and email campaigns with follow-up calls for sales reps.
- b. Using ACT! Add-ons, such as ListGrabber from www.eGrabber.com and ACT! Internet Links, the ACT! Admin can proactively search for new prospects on the internet by:
 - Creating mailing lists from online websites and directories
 - Searching for Yahoo news and media stories about key target accounts or top-tier prospects

13. **Manage "Request Log"**. To maximize ACT! training and troubleshooting throughout the company, the Administrator needs to be informed by ACT! users when issues arise. The Admin should create and manage a formal "request log" for this purpose which can then be turned into mini-training sessions or educational emails on an ongoing basis.

14. Training.

- a. The ACT! Administrator is responsible for advancing his/her own ACT! knowledge to be a company resource and the "go to" support person for all ACT! users. Aviva offers several ACT! training courses, such as "ACT! for Administrators" for this purpose. For the training schedule, go to www.aviva-aviva.com/training.html.
- b. Provide advice and training for new users in the company's ACT! processes.
- c. Identify and investigate common problems and provide guidance on "Best Practices."
- d. Establish and maintain User Desk Guides detailing common activities.
- e. Provide training on handling activities, tasks, activity series and clearing alarms.
- f. Training on the use of Groups and Group Reports.
- g. Inform users of tips and tricks to increase productivity and minimize effort.
- h. Attend, and encourage all company ACT! users to attend, the ACT! Users Group in your area. In St. Louis, Mani-ACT!'s Users Group meets once per month and consists of ACT! users from the metropolitan area who share ACT! power user tips and tricks. There are also advanced "how to" presentations by Aviva's ACT! Certified Consultants. For a user group schedule, go to <http://tinyurl.com/5dozm>

Synchronization Duties

15. For users who work remotely with ACT!, the Administrator must set up the synchronization. The following tasks need to be done regularly.
 - a. In addition to standard maintenance on the server, the Administrator needs to manage remote users and make sure they properly maintain their own databases.
 - b. Send and receive Synchronization Packets to and from remote users (or check that AutoAdmin has sent them).
 - c. Add new sync users and include users in the Sync Process.
 - d. Create a new database for new sync users.
 - e. Do a "Send All" when a remote user loses data from his/her local database.
 - f. Manage deleted records by remote users (whichever method is chosen for removing records).
 - g. Check all "records deleted by remote users" on every sync and clean them up.
16. **Disaster Recovery.** Know how to recover from disaster (e.g. "Help, the production database is gone!" or more serious incidents, such as fire, theft, water damage, etc.). Remote users must be able to synchronize again.
17. **Territory Realignment.** The Administrator is responsible for realigning territories once the sales department has defined them.
 - a. Align and realign groups for sync purposes.

Shared Duties: IT Manager and ACT! Administrator: Database and System Enhancement

18. Design, develop, test and implement new reports, templates and layouts.
19. Design, develop and test macros and queries for common use. Identify, recommend and install add-on utilities and tools to enhance productivity.
20. Maintain/update a system and software change log for each workstation. Undertake integration of data derived from other sources, i.e. mailing lists after testing, checking and, where necessary, modifying to the format and structure to match the company standards.

Server and Workstation Management

21. Install and setup software on workstations. Map network drives and establish pathways to common data.

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22. Establish standards and set up preferences, menus and tools bars for each workstation.
23. Ensure each workstation has the correct layout and views to undertake approved tasks.
24. Modify tool bars and menus to eliminate risk and enhance the user interface.
25. Establish pathways for document/report file sharing -- if desired.
26. Help users set-up PDA Hot Syncs.
27. Provide first level of support and guidance on system use.
28. Troubleshoot and rectify localized issues.
29. Understand and provide guidance on add-on programs and utilities.
30. Maintain a record of reported bugs, problems and resolutions.
31. Maintain a library of ACT! manuals, publications and white papers to assist users.
32. Establish Policies and Guidelines for management, development and enhancement of the system with the Corporate Management Team.
33. Establish, maintain and update budgets and proposals to ensure currency of the software and hardware associated with the ACT! database.
34. Maintain an awareness of developments in software and systems to maximize the ability and effectiveness of the ACT! software to interface with other software and systems in use by the organization.
35. Review and recommend any changes or enhancements that may improve functionality or productivity. Aviva's ACT! Certified Consultants distribute tech briefings regularly. If you're not yet on this list, go to www.aviva-aviva.com to sign up.

Have a specific ACT! question or comment?

Post it to our **FREE ACT! Forum** at:

<http://tinyurl.com/7xkpu>