ACTIVE SALES TECHNOLOGY | A Retired Client's Use Case

ACT to Microsoft Access Case Study

A retiring business owner kept essential customer records in a **26-year-old** ACT database, accessible, while leaving an unnecessarily expensive subscription behind.

CUSTOMER NEED	WHAT WE BUILT	HANDOFF
Keep existing ACT Contacts and ACT Notes usable while avoiding a subscription costing more than $500 per year.	A custom Access front end with linked views, contact search, and a sortable results list.	The working database, VBA source, instructions, and layout form-design backups.

The situation

As Billy prepared to retire, he no longer wanted to pay ACT!'s **$500-plus** annual subscription. He still needed a straightforward way to find contacts, review company details, get phone numbers and email addresses, and preserve the "ACT Notes" associated with them.

The goal was to keep the information useful without maintaining a full CRM subscription for the work he planned to do.

What we did

Active Sales Technology recreated a familiar view he'd used for over 20 years in Microsoft Access.

Now, with a cost-free interface, he works directly with related Contacts and ACT Notes, avoiding raw Excel Files with no ACT Notes.

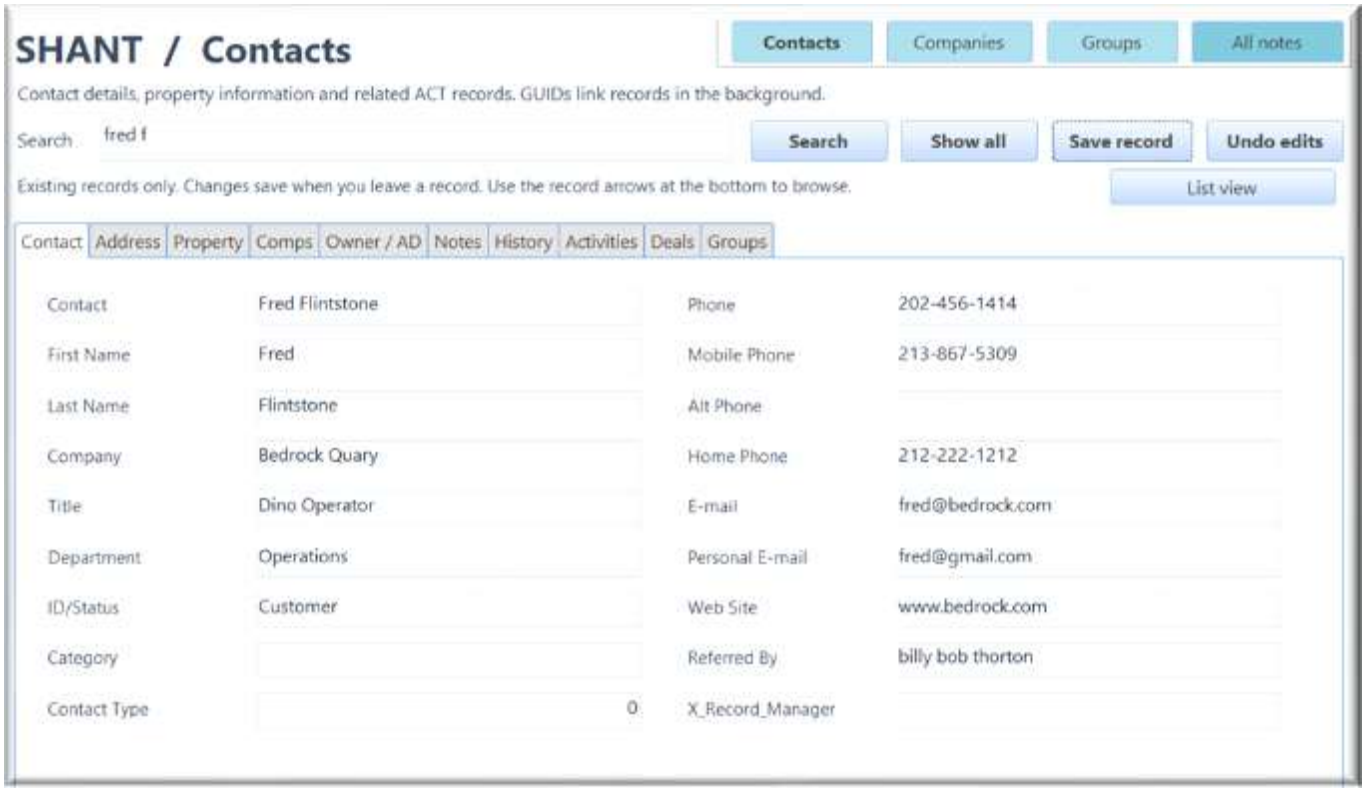
- **Connected record views.** Contacts, companies, groups, notes, history, activities, and memberships link to the related records; technical GUIDs stay hidden from the interface.
- **Made search results easy to use.** A scrollable contact list shows the current lookup, supports sorting by column, and opens a selected contact on double-click.
- **Protected the working data.** Existing records remain editable, while add and delete actions are disabled. The original database was left unchanged.
- **Prepared a complete handoff.** The delivery package includes the working Access database, VBA source, instructions, and form-design backups.

The result

Billy has a simple yet not-so-pretty Access front end for finding and reviewing the records he needs to keep. It offers a path away from the recurring ACT! charge for this focused use case.

- Billy avoided the $500-plus yearly ACT subscription cost!

> **Still using ACT after your business needs have changed?** Active Sales Technology can review the records you need to keep and help identify a practical path forward.


SHANT / Contacts
Contacts
Companies
Groups
All notes
Contact details, property information and related ACT records. GUIDs link records in the background.
Search
fred f
Search
Show all
Save record
Undo edits
Existing records only. Changes save when you leave a record. Use the record arrows at the bottom to browse.
List view
Contact
Address
Property
Comps
Owner / AD
Notes
History
Activities
Deals
Groups
Contact
Fred Flintstone
First Name
Fred
Last Name
Flintstone
Company
Bedrock Quary
Title
Dino Operator
Department
Operations
ID/Status
Customer
Category
Contact Type
0
Phone
202-456-1414
Mobile Phone
213-867-5309
Alt Phone
Home Phone
212-222-1212
E-mail
fred@bedrock.com
Personal E-mail
fred@gmail.com
Web Site
www.bedrock.com
Referred By
billy bob thorton
X_Record_Manager