



EFFICIENT OFFICE COMPUTING
Optimize Your Software: Optimize Your Time

ACPOI

What is ACPOI?

ACPOI is my acronym for how you can optimize your software and make your life a little bit easier.

ACPOI stands for:

Automation
Customization
Personalization
Organization
Integration

Each of these “technical” terms is a bird’s-eye view of how to better utilize your software. The key is to take these objectives and implement them using functionality that is built into the software. With just a few simple mouse-clicks you can easily get the software you use every day to work harder for you.

One of the best things about ACPOI is that you only have to do it once. What I mean is that after you setup any part of ACPOI in your software it will run from that moment on. So here are some helpful tips from the ground-level view.

Automation

When you find yourself doing repetitive tasks at your computer there is a good chance that it can be automated. One great example is reading your email.

We all check our email every day, several times a day. Some people even read their email several times an hour. After speaking with many entrepreneurs I found that almost 50% of their day was spent reading, sorting, filing, and responding to email. That's a lot of time, and in most cases, a good percentage of it is wasted time.

Email is an important form of communication and one we all have to address on a regular basis, but not all email messages are created equal. In the course of a single day we all receive very important messages, moderately important messages, interesting messages, and useless messages. If they all arrive in our inbox together, we have to at least glance at the sender and the subject line to categorize the message before moving on to the next one. This is a repetitive task – let's automate it!

Email client software programs offer functionality where you can create “rules” or “filters” that will allow the software to “read” the email messages and then file them appropriately.

Simple Steps

1. Pick a type of rule or filter that you want. Standard types include:
 - a. Who the message is from
 - b. What words are in the subject line
 - c. What words are in the text

2. Choose the “condition” or what you want to happen to the message. Standard options include:
 - a. File in specific folder
 - b. Delete
 - c. Forward
 - d. Flag or mark as important
3. The last step lists any exceptions, such as:
 - a. If the words are found in the subject line from a specific person, then don’t delete
 - b. If the message is from a specific person but someone else is listed on the CC: line, then file it in a different folder

Software Specifics:

Microsoft Outlook 2007 – Click on Tools in the menu bar, and then Rules and Alerts in the pull down menu to start the Rules Wizard.

<http://office.microsoft.com/en-us/outlook/HP052428971033.aspx>

Gmail – Click on Create a Filter.

<http://mail.google.com/support/bin/answer.py?hl=en&answer=6579>

Yahoo – Click on Options in the menu bar, and then Mail Options from the pull down menu.

http://help.yahoo.com/tutorials/mmail/mmail/mm_filter1.html

Eudora – Click on Tools in the menu bar, and then Filters in the pull down menu.

http://www.eudora.com/techsupport/tutorials/win_filters.html

Entourage – Click on Tools in the menu bar, and then Rules in the pull down menu.

<http://www.entourage.mvps.org/rules/custom.html>

Customization

There are so many menus, options, functions and features in most software that it is difficult to remember where to find them all. Even worse, sometimes you can't find the one you really need to use!

The good news is that many programs allow you to customize the menus in order to have the features you need and use most only a single-click away. You can modify existing menu bars or icon bars, and some software programs offer a separate area for custom links including customizable dashboards.

Software Specifics:

Microsoft Outlook 2007 – Click on Tools in the menu bar, and then Customize in the pull down menu. You can modify existing toolbars or create a new one.

The rest of Microsoft Office 2007 (Word, Excel, PowerPoint, Access) – Click on the Office Button at the top left of the window. At the bottom of the menu that opens you click on the “Options” button (Word Options, Excel Options, etc.). In the Options window that opens, click on Customize in the menu listing on the left. You can add or remove commands from the Quick Access tool bar (it is located at the top of the software window, above the main toolbar). Then Click OK to save your customization.

QuickBooks – Click View from the menu bar, and then Customize Icon Bar from the pull down menu. You can edit, rearrange, add or remove an icon. Click the Add button to open the list of commands. You can choose a command, choose the icon, edit the label and edit the description. Click OK and OK and your new icon is on the icon bar. A secondary way to add new icons to the icon bar is to view what you want to add, such as a report or entering an invoice, then

click on View on the menu bar. Now there is an additional option in the pull down menu – Add “name of window”. Click that option and the window that you have open will be added as a new icon.

Firefox – Click on View from the menu bar, then Toolbars, then Customize. You can add or remove items from the toolbars or create a new one. Additionally, you can save websites as buttons to the Bookmarks Toolbar. Click Bookmarks from the menu bar, then Bookmark This Site from the pull down menu. Next, select Bookmarks Toolbar as the option for Folder and click Done.

Internet Explorer – Left-click on the blank area of the toolbar, then click Customize from the pull down menu. Choose Add or Remove Commands from the next pull down menu. Similar to Firefox, you can save websites to the Favorites Bar. Click Favorites from the menu bar, then Add to Favorites Bar. The website that you are viewing is immediately added to the Favorites Bar.

Personalization

Besides the customization that helps make features and functions easier to find, you also have to be able to retrieve information that is unique to your needs. For this task almost every database you use offers reports with filters.

Before I go any further, let's chat about databases. A database is simply software that houses sets of information, such as contacts, appointments, tasks, financial transactions, and any other list you can think of. This translates into your email client, CRM, calendar, accounting software, and even those lists in Excel spreadsheets.

These databases hold information in small pieces, such as first name, last name, phone, email, zip, date, time, description, and more. To personalize the reports you simply have to create filters that allow the information you need to come through, and all the stuff you don't need to be left behind.

For most software, you launch the report and then click on Modify or Options to change the filters of the report. When you have them set the way you want, just name the report and save it (or memorize it).

Once you have your personalized reports saved, you can add them to your customized menus, which will save you even more time.

Organization

Being organized is a great way to make the most of your time, and it can make life easier on so many levels. Have you ever tried to find a Microsoft Word document or email message and had to spend way too much time looking for it?

It is time to get all the external files organized so you can easily find documents, especially the ones you only reference occasionally. By creating a simple yet detailed file and folder naming structure you will quickly find what you need and identify if it was misfiled.

The first step is to understand your hard drive/storage structure. If you are working on a network you need to know the drive letter, such as G:\ or N:\, otherwise, your local hard drive is C:\ and in some cases D:\. If you have an external drive you will need to know that drive letter too. Go to My Computer (either an icon on your desktop or click the Start button and it will be listed in the menu) and you will see all your drives listed.

The second step is to create a folder naming system. It is best to keep the folder names short and utilize sub folders for more details. One example is Client\Project\. Here is an example:

G:\Dell\Marketing\

The client in Dell and the project is a Marketing campaign. This folder is going to be full of different types of files, and each one will have specific information. For example, a logo, a campaign plan, and the copy text for a flyer. Your file naming structure should reflect the folder location as well as the information in the file and the date. The date is important because although there are dates associated with files, if I create it on March 1 but copy it to your computer on March

15 the copy will hold the March 15th date since that's when it was created on your computer.

So, here is one suggestion for a file naming structure:

clientprojectinformationdate.filetype

Here's an example:

dellmktgplan100301.doc

The full location of this file is:

D:\Dell\Marketing\dellmktgplan100301.doc

One more thing I wanted to mention about using the date in the file name is to start with the year, then month, and end with the day. The reason for this is that if you have revisions they will have different dates but possibly the same file name. In a list of files the date will be the deciding character for sorting. Starting with the year keeps everything from the same year together, and then it will move to the month so the sort will be 01 (January) to 12 (December). Finally, the day will be sorted within the month. The end result is a chronological list of documents that have the same name but different dates.

You can also start with the date which would make all files chronological regardless of the name and type.

Here is a fun podcast I participated in regarding file management recorded and posted by Virgo Audio.

http://www.virgoaudio.com/audio_media/att/ATT1-FileManagement.mp3

Integration

Entering data twice or more is flat out a waste of time. Additionally, you run the risk of making mistakes that at the least will make you question which entry was correct and at the most, disallow for any possible synchronization because of data mismatch.

Software programs that communicate with each other allow for time saving data entry and shared information that would otherwise require multiple reports or manual Excel spreadsheets. The most popular integration is between accounting software and CRM systems. The ability for salespeople to see financial information about their customers, without being able to edit the financial information, is a great relief to the accounting department.

Seriously, when one department can see valuable information usually safeguarded by another department, internal communication becomes clearer and answers come more easily and quickly. Even in a one-person business, retrieving the appropriate data for the task at hand may require information from different software programs.

In addition to software that have built-in capabilities to communicate with other software, there are also add-ons that can accomplish this data link and enable synchronization.

Software Specifics:

Microsoft Outlook to Constant Contact – requires an add-on available at Constant Contact that will allow Outlook contacts to be uploaded to Constant Contact in a single click.

QuickBooks and CRM – Salesforce.com, ACT!, and ZohoCRM all have add-ons that integrate with QuickBooks. You can synchronize your

customer information and send financial data from one software to the other.

MicrosoftCRM and Microsoft Great Plains – there is a direct connection between them and they can share information seamlessly.

Accpac ERP and SageCRM – there is a direct connection between them and then can share information seamlessly.

Another simple form of integration is ODBC (open database connectivity) that allows you to embed data from an Excel spreadsheet into a Word document but maintain the link rather than just cut and paste the information. This link enables you to change information in the spreadsheet and have the Word document automatically updated.

Other software that works with ODBC links can gather information from several other software programs and create merged presentations and dashboards. The ability to bring information to a single location from multiple locations is a very powerful option and can save countless hours of running reports and manual analysis.

Conclusion

Software is flexible, and the people who design software have made them jam-packed with functionality that can save you a lot of time and aggravation. If you use software that I haven't mentioned, look for words like Tools, Options, Filters, and Customize in their menus to uncover more features than you imagined they had.

ACPOI is a concept based on IT jargon and has valuable real-world applications.

Automation helps you get things done in less time and with less work.

Customization helps you make your software work the way you work.

Personalization helps you quickly and easily retrieve information that is most important to you.

Organization helps you save things in the right location so you can quick find them when you need them.

Integration helps minimize data entry errors will optimizing the data across departments and business functions.

Put ACPOI to work for you!