

# ACT!: Administrator

Course Code: **ACT5-A**

Time: 3 days

Prerequisites: ACT!: Introduction

## **The Basics**

*What's Contact Management Software?*

*Starting ACT!*

*Contact Record Basics Review*

*The Anatomy of a Record*

*The "My Record" Contact Record*

*"I Feel So Us(er)ed"*

*Examining Structure*

*Directory Structure*

*File Structure*

## **Setting Up**

*Using Available Documentation*

*Using the ACT! Knowledge Base*

*Preparing the Server*

*Opportunistic Locking*

*Novell Netware Issues*

*Windows NT/2000 Issues*

*Drive Mappings*

*Systems Check*

*Minimum System Requirements*

*Supported Operating Systems,*

*Networks, and Programs*

*Network Cards and Windows 98*

*10-Digit Dialing*

*Systray Check*

*Config.sys settings*

*Screen Area and Large fonts*

*Local Administrator Rights*

*Installing*

*Upgrading ACT! Versions*

*Save SideACT!*

*The Need for Speed*

*ACTDiag*

*Removing Temp Files*

*Load Contacts*

*Record Update Frequency*

*Disk Defrag and Scandisk*

*ACT! Preferences*

*Choosing a Word Processor*

*File Locations*

*Controlling Activities*

*Prefixes and Suffixes*

*Startup*

*Setting Up an E-Mail System in ACT!*

*Troubleshooting E-mail Connectivity*

*Need for Speed (continued)*

*Checking and Closing Tab Filters*

*Speeding Up Contact List View*

*Filtering Calendar and Task List Views*

*Sharing Outlook and ACT! Activities*

*Filtering Group Notes*

*Verify Connectivity*

*Adding Users*

*Creating New Users*

*Deleting Users*

## **Dealing with Data**

*Populating the Database*

*Importing from an Excel Spreadsheet*

*Importing into a Group*

*Is Your Database Indexed Properly?*

*Syncing*

*Importing – Advantages and*

*Disadvantages*

*Criteria for a Successful Import*

*Cleaning up the Data*

*Fixing Problem Names*

*The Salutation Field*

*Duplicates*

*Duplicate Definition*

*Scanning for Duplicates*

*Manually Identify the Duplicates*

*Merging Lots of Duplicates*

*Deleted Records*

*Effect on a Database*

*Compressing the Database*

*Deleted Records and Synchronization*

*Edit Replace*

*Swap or Copy*

## **Regular Maintenance**

*Backup*

*Restoring a Backup*

*File, Administration*

*Setting a Password for Yourself*

*Database Maintenance & Repair*

*Data Cleanup*

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*Tilde Bug*

*Deleting A Database*

*Reminders*

*Group Rules*

*Running the Rules*

*ACTDiag*

*Removing Index Files*

*Resetting ACT! Windows and Toolbars*

*Resetting ACT! Windows Options*

*Undelete Records*

*Disaster Recovery (Scan & Repair)*

## **Modifying Database Design & Layouts**

*Customizing Contact Fields*

*Preparing for Changes*

*The Attributes Tab*

*The Drop-down Tab*

*Creating Drop-down Lists for Importing*

*Minor Changes to the Drop-down List*

*Editing the Database Structure*

*The Triggers Tab*

*Using Groups Creatively*

*Group User Fields*

*Add Columns to the Groups Tab*

*Deleting a Field – NOT*

*Create a Definition Database*

*Defining and Modifying Layouts*

*Defining and Modifying Layouts*

*Saving Layouts*

*The Tool Palette*

*Modifying Layouts*

*Aligning Objects*

*Adding Items to Your Layout*

*Adding Text*

*Formatting Layouts*

*Layout Tabs*

*Testing Your Layouts*

*Field Entry Order*

*Group Stops*

*Changing from Gray to Beige*

## **Synchronization**

*Synchronizing Databases*

*Determine the Connection Method*

*Set up Folders or E-mail Addresses*

*Determine What Will Be Synchronized*

*Define Users*

*Create Synchronization Database(s)*

*Set up Synchronization*

*Perform the Synchronization*

*Tell ACT! Where Sync Packets Are*

*E-mail Synchronization*

*Automatic Synchronization*

*Synchronizing - Adv and Disadv*

*Troubleshooting*

*Evil Twins*

*Number of Records Don't Match*

*E-Mail Packages*

*Sync Folders*

*Date, time, and time zones*

*Disk space requirements*

*Backdating the Sync*

*Other Sync Options*

*Database to Database Synchronization*

*Syncing Sales Opportunity Information*

*Importing Products into Sales*

*Opportunities*

*Modifying Sales Stages*

*Syncing Groups*

*Regular Groups*

*Collection Groups*

## **Customizations**

*Custom Templates*

*Creating a Custom Document Template*

*Using a Custom Template*

*Word Macros*

*Merging Custom Template to a Lookup*

*Envelopes and Mailing Labels*

*Printing in Zip Code Order*

*Hidden Text*

*Repairing Deleted Hidden Text*

*Attachments*

*Attachment Problems*

*Report Templates*

*The Report Design Screen*

*The Header Section*

*The Contact Section*

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*The Footer Section*  
*Adding Report Objects*  
*Print Preview*  
*Sizing Sections*  
*Changing Field Properties*  
*Closing up blank space*  
*Summary Sorted By*  
*Section Options*  
*Summary Fields*  
*More Sections*  
*Object Source Information*  
*Report Filters*  
*Using Custom Reports*  
*Adding the Report to the Menu*  
*Limitations of ACT! Reports*  
*History vs Notes vs Activities*  
*Adding the History Icon to the Toolbar*  
*Some Report Names are Important*  
*Salesman Not Available for Filtering Reports*  
*Advanced Reports*  
*Page Breaks*  
*Inserting a Graphic in a Report*  
*Sales Opportunities*  
*Sales Reports*  
*Macros*  
*Recording a Macro*  
*Running a Macro*  
*Assigning Macros to Toolbars & Menus*  
*Assign a Command to a Toolbar*  
*Assign a Command to a Menu*  
*Shortcut Keys*  
*Resetting Toolbars, Menus, & Keyboard*  
*Deleting a Macro*  
*Queries*  
*Lookup By Example*  
*Creating Advanced Queries*  
*The Query Helper*  
*Adding a Custom Query to the Menu*  
*Deleting Query Files*  
*Distributing Customizations*

## **Appendix**

*Creating a Database*  
*Using ACT! with the Palm*  
*Maintenance Manual*  
*Server Checklist*  
*ACT!2000 Workstation Setup*  
*Steps for Modifying Database Design*  
*Setting Up a New Sync Process Checklist*  
*ACT!2000 Error Logging*  
*To Sync by Shared Folder*  
*To Sync by E-Mail*  
*Sync Troubleshooter*  
*Stars R Us Database Structure*