

ACT! Administration

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Course Outline

Installation and conversion

Installing ACT! 2007

- Discussing server installation
- Discussing workstation installation
- Updating an installation
- Registering and activating ACT! 2007

Upgrading from ACT! 6.0

- Converting an ACT! 6.0 database
- Converting supplemental files to 2005 format

Opening a database

- Opening a database on a local computer
- Opening and viewing a PAD file in Notepad

Database creation

Creating and deleting databases

- Creating a database on a local computer
- Deleting a database

Importing and exporting contacts

- Turning off duplicate checking before an import
- Importing contacts from a text file
- Exporting all Arizona contacts to a text file

Managing user accounts

- Adding new users to the database
- Deleting an existing user
- Editing an existing user's security role

Managing teams

- Creating a team
- Limiting access to a contact record
- Setting the default contact access for new contacts

Defining fields

Adding new fields

- Adding a character field
- Adding a number field
- Adding a phone number field
- Adding a date field
- Adding a memo field to store directions
- Adding an address block
- Adding a Yes/No field

Editing and removing fields

- Changing the name of a field
- Changing a field's attributes
- Deleting a field

Managing drop-down lists

- Creating a drop-down list field
- Editing a drop-down list
- Importing items for a drop-down list
- Associating a drop-down list with a field

Designing layouts

Working with layouts

- Viewing layout files in Windows Explorer
- Changing the layout
- Opening the Layout Designers

Adding tabs and fields

- Adding a new tab
- Adding a standard text field
- Adding a memo field
- Adding a Yes/No field
- Copying and pasting a field

Adding objects to a layout

- Adding rectangle object
- Adding a text object
- Adding an image

Fine tuning a layout

- Changing object attributes
- Aligning two fields' left edges
- Making two objects the same size
- Sending an object to the back of a layout

Setting field entry order

- Moving from field to field in the Contacts view
- Clearing the field entry order
- Setting the Tab stop order
- Setting the Enter stop order

Setting preferences

Setting general preferences

- Specifying the default folder for storing databases
- Adding new name prefixes and suffixes
- Setting the default behavior for the Salutation field
- Finding duplicate contacts
- Changing the appearance of views, tabs, and lists
- Setting the default startup database

Setting calendar and scheduling preferences

- Setting calendar preferences
- Setting the defaults for new activities

Setting communication preferences

- Setting ACT! to work with Microsoft Outlook
- Configuring settings for mail messages
- Creating an mail signature
- Setting the default word processor

Menu/toolbar customization

Creating custom commands

- Creating a custom command for a program
- Creating a custom command for a template

Adding and removing menu and toolbar commands

- Adding a command to the toolbar
- Adding a command to the menu
- Removing a command from the menu and toolbar
- Resetting menu and toolbar customization
- Creating a keyboard shortcut for a command

Customizing the navigation bar

- Switching navigation bar modes
- Removing an item from the navigation bar

Database maintenance

Backing up and restoring a database

- Performing a backup
- Restoring a backup

Performing routine maintenance

- Performing a check and repair
- Removing notes that are older than 50 days

Using the ACT! Diagnostic Tool

- Launching ACTDIAG
- Viewing basic server information
- Viewing database audit logs
- Running a database fields report
- Detaching and manually deleting a database

Synchronization

Managing the sync server

- Discussing synchronization
- Configuring a network synchronization service
- Enabling synchronization on the server

Managing the Sync Set

- Creating a Sync Set for a remote user
- Adding a contact to the Subscription List

Creating and deploying a remote database

- Creating a remote database
- Restoring a remote database
- Synchronizing a remote database

Course Information

Course Type: Instructor Led Training
Course Length: Flex
Prerequisites: ACT! 2007 Basic, ACT! Advanced, Windows XP Advanced, or equivalent experience.

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