

ACT! 2010: Basics

Working With ACT! Basics

- What's Contact Management Software?
 - Starting ACT!
- Log on
- Opening a Database
 - Setting Up For Class
 - Opening Other Databases
- ACT! Screen Elements
- Welcome Page
 - Changing Your Startup View
- The Nav Bar
- View Toolbar
 - Layout Tabs
- Layouts
 - Sizing the Contact Detail Window
- Contact Record Basics
 - The "My Record" Contact Record
 - My Record
 - Our Practice Database
 - An Overview of Security Roles
 - Contact Fields
- Inserting a New Contact Record
 - Drop-down Fields
 - Duplicating Contacts
 - Assigning Security
 - Changing Some Preferences
 - Deleting Contacts

Working Your Contacts

- Locating Contacts
 - Browsing Records
- Detail View and List View
 - Sorting the Contact List
 - Related Task Pane
 - Adding and Removing Columns
- Nav Bar Lookup Pane
- Lookup
- Lookup Variations
 - Adding to Lookups
 - Narrowing Lookups
 - Previous Lookups
 - Keyword Searches
 - Lookup, Any fields
 - Lookup Annual Events
- Working In List View
 - Edit Mode
 - Tag Mode

- Lookup and Omit Tagged Records
- Printing Lookups
- Secondary Contacts
 - Lookups on Secondary Contact Fields
 - Promoting From Within
- Attachments
 - Opening and Editing Files
- Removing Files from the Documents Tab
- Relationships
- Web Info
 - Web Info Tab
 - Website Links
 - Attaching Web Pages From IE

Working Your Schedule

- Activities
 - Simple Scheduling
- Scheduling Activities using the Calendar
- Viewing the Calendar
 - Calendar Pop-ups
 - Navigation Tips for the Calendar Views
 - The Today Button
 - Filtering the Calendar
- Adding an Outlook Meeting to Calendar
- Sharing Microsoft Outlook and ACT!
- Calendar vs. Task List
- The Task List
 - Filtering the Task List
 - Printing Your Task List
 - Display the Mini-calendar any time!
- Modifying Scheduled Activities
- Clearing Activities
- Recording History
 - Recording History to Multiple Contacts
- Taking Notes
 - Viewing and Editing Notes
 - History vs. Notes
 - Deleting a Note or History
- Scheduling-General Tab
 - Scheduling for Multiple Contacts
 - Scheduling Availability Tab
 - Responding to an ACT! Invitation
- Alarms
 - Responding to an Alarm
- Scheduling-Recurring Activities
- Advanced Options
 - Attachments
 - Public vs. Private Activities

ACT! 2010: Basics

- Scheduling Activities for Other Users
- Displaying Other Users' Activities
- Adding "Scheduled For" to Task List
- Printing the Calendar
- Roll Over
- Events

Working with E-mail and Letters

- ACT! Can Help You Communicate
 - ACT!'s E-Mail Integration
 - Setting Up Your E-mail in ACT!
- ACT!'s Integration with Outlook
 - Sending E-mail from the Contact
 - Sending an E-mail from Outlook
- Choosing a Word Processor
- New Menu Item in Word
- Creating Correspondence
 - Creating a Mail-Merge Template
- Merging the E-mail Template
- Creating Letters, Memos, and Faxes
 - Printing Documents
 - Editing the Attached Document
- Envelopes and Mailing Labels
- Dealing With Your Outlook Inbox
- Adding an Outlook Meeting Request
 - Creating a Contact from an E-mail
 - Attach an E-mail to a Contact
 - Using the Quick Attach Feature
 - Setting Your Quick Attach Preferences
 - Handling Unattached Messages
 - Using the Attach to ACT! Icon
 - Creating an Activity from an E-Mail
- Sending Contact Information as a vCard
- ACT! Reports
 - Favorite Reports

Working With Groups & Companies

- Groups
 - Displaying a Group Lookup
 - Manually Adding a Contact to a Group
- Companies
 - Creating/Populating a Group or Company
 - Adding Multiple Contacts
 - Using Criteria for Your Groups
 - Linking Contacts to Companies
 - Create a Company from a Contact
 - Difference between Link and Associate

- Create a Contact from a Company
- Disabling a Company Link
- Pushing Changes Back to Contacts.
- Pulling Changes from Company Record
- Convert a Group to a Company
- Divisions and Subgroups
 - Move or Promote a Division
- Cumulative Views of Notes, History, etc.
 - Company Note or History
 - Sharing Items with a Company/Group
 - Changing Companies
 - Filtering Tabs
- Lookup Companies or Groups

Working with Opportunities

- Creating Opportunities
 - Updating an Opportunity
 - Creating a Quote
 - Closing the Deal
- Opportunities: List View
 - Lookup Opportunities
 - Export to Microsoft Excel
- Opportunity Reports
 - Opportunity Pipeline
 - Opportunity Graph

Working with Dashboards

- Using Dashboards
 - Displaying Dashboard Views
 - Working in the Dashboard Views.
 - Other Dashboards

Working with Synchronization

- Synchronizing Your Remote Database
 - Synchronizing the Remote Database
 - Set up Sync Schedule with Scheduler
 - Using the Subscription List

Appendix

- Understanding Security Roles
- ACT!'s E-Mail
 - Setting Up Your E-mail Signature
 - Understanding ACT! E-mail
 - Sending E-mail from ACT! E-mail
 - Send/Receive Button
- Automatic Update Notification