

ACT! Everyday Outline

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
 - Scheduling Activities for Other Users
 - Displaying Other Users' Activities
 - Adding "Scheduled For" to Task List

ACT! Everyday Outline

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