

Administering ACT! 2007

The Basics

- So You Get to be the ACT! Administrator
- ACT! vs. ACT! Premium
 - ACT! Premium for Web
 - Which Edition for Premium Version?
 - Starting ACT!
- Log on
- Opening a Database
 - Setting Up For Class
 - Opening Other Databases
- Contact Record Basics Review
 - The Anatomy of a Contact Record
 - The “My Record” Contact Record
 - My Record
- Understanding Security Roles
- Adding Users
 - Creating New Logon Users
 - Making Users Inactive
- Password Management
 - Defining a Global Password Policy
 - Overriding Password Policy Settings
 - Setting a Password for Yourself
- Team Management
 - Limiting Contact Access
 - Assigning Limited Access to a Lookup
 - Lookup Contacts by Access
 - Securing en Masse
- Field Security

Setting Up

- Using Available Documentation
 - Using the ACT! Knowledge Base
- Setting Up a Multi-User Database
- Examining Structure
 - File Structure
 - Directory Structure
 - Transferring Database to Another PC
 - Enable Share an Existing Database

Database Security

- Database Security
- Understanding Security Roles
- Creating New Logon Users
 - Making Users Inactive
- Team Management
 - Limiting Contact Access
 - Assigning Limited Access to a Lookup

- Lookup Contacts by Access
- Securing en Masse
- Field Security

Configuring Workstations

- Basic Requirements
 - Minimum System Requirements
 - Local Administrator Rights
- Installing
- Understand/Modify Tools Preferences
 - File Locations for Multi-User Database
 - Setting Up E-mail System in ACT!
 - Adding ACT! Address Book to Outlook
 - Setting Up Default History Option

Database Administration

- General Database Maintenance
 - Automatic Update Notification
 - Back Up
 - Automatically Backing Up Database
 - Manually Backing Up Your Database
 - Restoring a Backup
 - Deleting a Database
 - Check and Repair
 - Scheduling Database Maintenance
 - Checking the ACT! Scheduler Log
- Cleaning up the Data
 - Duplicates
 - Tips for Dealing with Duplicates
 - Combine Duplicate Records
 - Edit, Replace
 - Edit, Swap or Copy Fields
 - Update Salutation Field
 - Remove Old Data
- Events

Queries

- Activity Data Mining
- Queries
 - Lookup By Example
- Advanced Queries
 - And/Or Revisited
 - Grouping
 - Deleting Query Files
- Creating/Populating a Group or Company
 - Adding Multiple Contacts to a Group

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Synchronization Maintenance

Synchronizing Databases

Administrator Tasks – Preparation

1. Determine the Connection Method
2. Define Remote User(s)
3. Determine Sync Set
4. Determine Files to Synchronize

Administrator – Setting Up Sync

Set Up the Environment

Enabling Synchronization

Defining Sync Sets

Create Remote Databases

Prepare the Remote Database(s)

Administrator – Turning on Sync

Setting Up Application Sync

Setting Up the Network Sync Service

Setting Up Internet Sync

End User – Remote Database

Modifying Setup for Internet Sync

Synchronizing the Remote Database

Set Up a Sync Schedule

Set Up a Sync Schedule with Scheduler

Using the Subscription List

Administrator – Territory Realignment

Synchronization Troubleshooting

Appendix

User Roles and Permissions

Converting an older ACT! Database

Standard vs. Custom Conversion

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