

Customizing ACT! 2007

Database Design & Layouts

- Creating a New Database
 - Customizing Fields
- Field Attributes
 - Enter field name and type
 - Customize field and list behavior
 - Customize field behavior
 - Set field triggers
- Manage Drop-down Lists
 - Creating Drop-down Lists for Importing
 - Importing the Drop-down List
 - Minor Changes to the Drop-down List
- Editing the Database Structure
- Field Security
- Defining and Modifying Layouts
 - Designing Layouts
 - Saving Layouts
 - The Tool Palette
 - Formatting Toolbar
 - Modifying Layouts
 - Renaming the Field Labels
 - Moving Objects
 - Aligning Objects
 - Adding New Fields to Your Layout
 - Layout Tabs
 - Adding Other Objects
 - Formatting
 - Changing Background Tab Color
 - Make Same Width or Height
- Testing Your Layouts
 - Field Entry Order

Customized Templates

- Creating a Custom Document Template
 - Merging the Template with a Lookup
- Envelopes and Mailing Labels
- ACT! Word Processor
 - ACT! Toolbar and Ruler
 - Status Bar
 - Tables
 - Graphics
 - Changing Back
- Formatting E-Mail Templates
 - Insert Hyperlink
 - Merging the E-mail Template
- Sending an E-mail to Group Members
 - One E-mail...Lots of Addresses

Feature Customizations

- Customizing Menus and Toolbars
- Adding Object to Menu/Toolbar/Keystroke
 - Distributing Menu and Toolbar Settings
 - Resetting Toolbars, Menus, Keyboard
- Customizing Priorities
- Creating New Activity Types
- Activity Series
- Opportunity Customizations
 - Creating a Custom Process
 - Creating Defined Product Lists
 - Editing the Quote Template
- Mapping ACT! Fields into Microsoft Excel
 - Preparing the Excel File
 - Merging the Excel File

Running & Designing Reports

- ACT! Reports
 - The Anatomy of an ACT! Report
 - Which Report Do I Want?
- Report Templates
 - The Report Designer Screen
 - The Report and Page Header Sections
 - The Detail Section
 - The Report and Page Footer Sections
- Adding Report Objects
 - Formatting
 - Is it a Field or a Label?
 - Sizing Sections
 - Group By
 - Section Behavior
 - Summary Fields
 - Subreports
- Report Filters
 - Using Custom Reports
- Using Scripting in Your Reports
 - Removing Blank Space Between Fields
 - Printing Checkmarks for Yes/No Fields
 - Choose Home or Business on Print
 - Label

Appendix

- Layout Properties
- Report Properties

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