

ACT! 2007: Everyday

The Basics

- What's Contact Management Software?
- ACT! vs. ACT! Premium for Workgroups
 - Starting ACT!
- Log on
- Opening a Database
 - Setting Up For Class
 - Opening Other Databases
- ACT! Screen Elements
- The Navigation Bar Menu
- Toolbar Buttons
- Layouts
 - Layout Tabs
 - Sizing the Contact Detail Window
- Contact Record Basics
 - The Anatomy of a Contact Record
 - The "My Record" Contact Record
 - My Record
 - An Overview of Security Roles
 - Contact Fields
- Inserting a New Contact Record
 - Drop-down Fields
 - Duplicating Contacts
 - Assigning Security
 - Changing Preferences
 - Deleting Contacts

Working Your Contacts

- Locating Contacts
 - Browsing Records
- The Contact List
 - Sorting the Contact List
 - Adding and Removing Columns
- The Lookup Menu
 - The Effects of a Lookup
- Lookup Variations
 - Adding to Lookups
 - Narrowing Lookups
 - Keyword Searches
 - Lookup, Any fields
 - Lookup Annual Events
 - Tag Mode
 - Lookup and Omit Tagged Records
- Secondary Contacts
 - Lookups on Secondary Contact Fields
 - Promoting From Within
- Taking Notes

Working Your Schedule

- Activities
 - Calls, Meetings, and To-dos
 - Invitations
 - Responding to an Invitation
- Using the Calendar
 - Calendar Pop-ups
 - Navigation Tips for the Calendar Views
 - The Today Button
 - More on Mini-calendars
- Modifying the Navigation Bar
- Calendar vs. Task List
- The Task List
 - Filtering the Task List
 - Task List Pop-ups
- Modifying Scheduled Activities
- Clearing Activities
 - Deleting a Note or History
- Recording Unscheduled Activity to History
 - Recording History to Multiple Contacts
 - History vs. Notes
- Scheduling-General Tab
 - Scheduling for Multiple Contacts
 - Alarms
 - Responding to an Alarm
- Scheduling-Recurring Activities
- Advanced Options
 - Attachments
 - Public vs. Private Activities
 - Sending an E-mail reminder
 - Scheduling for Other ACT! Users
 - Displaying Other Users' Activities
- Scheduling Activities using the Calendar
- Printing the Calendar
 - Roll Over
- Sharing Outlook and ACT! Activities
 - Automatically Sync Outlook with ACT!
- Events

Getting It On Paper

- Creating Letters, Memos, and Fax Covers
 - Printing Documents
 - Editing the Attached Document
- Custom Templates
 - Creating a Custom Document Template
 - Merging the Template with a Lookup
- Envelopes and Mailing Labels

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Choosing a Word Processor
New Menu Item in Word
ACT! Reports
 The Anatomy of an ACT! Report
 Which Report Do I Want?

Working with E-mail

You've Got Mail
 Setting Up Your E-mail in ACT!
 Understanding ACT! E-mail Window
 Reading Your E-mail
 Sending E-mail from ACT! E-mail
 Send/Receive Button
ACT! Makes You Glad You Use Outlook
 Adding ACT! Address Book to Outlook
 Setting Up the Default History Option
 Sending E-mail from the Contact
 Sending an E-mail from Outlook
 Creating a Contact from an E-mail
 Attach an E-mail to a Contact
 Creating an Activity from an E-Mail
E-Mail Merge
 Creating the E-mail Template
 Merging the E-mail Template
 Sending an E-mail to a Group
 One E-mail...Lots of Addresses

Internet Services

The Internet
 Internet Services Icon
 View, Internet Services
 Attaching Web Pages

Documents Tab

Attachments
 Adding File Shortcuts to Notes
 Opening and Editing Files
Removing Files from the Documents Tab

Groups & Companies

Groups
 Displaying a Group Lookup
 Manually Adding a Contact to a Group
Companies
 Creating/Populating a Group or Company
 Adding Multiple Contacts
 Linking Contacts to Companies

Create a Company from a Contact
Link/Associate - What's the difference?
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

Opportunities

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

End-User Synchronization

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

Appendix

Understanding Security Roles
 User Roles and Permissions
 Automatic Update Notification

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