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

ACT! 2007: Everyday