

# Administering ACT! 2008

## The Basics

- So You Get to be the ACT! Administrator
- ACT! vs. ACT! Premium
  - ACT! Premium for Web
  - Premium Version Editions
- 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
  - Our Practice Database

## Setting Up

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

## Configuring & Installing Workstations

- Pre-Install Checklist
  - Do you have right ACT! version?
  - Is your other software compatible?
  - Meet Minimum System Requirements?
  - Verify 2GB Free Space
  - Ensure File/Printer Sharing Enabled
  - Set System Restore Point
  - Verify Local Administrator Rights
- Pre-Install Tasks
  - Create install folder
  - Uninstall earlier versions
  - Boot in Selective Startup Mode
- Installing on Workstations
- Applying Some Performance Tweaks
- Understand/Modify User Preferences
  - File Locations for Multi-User Database
  - Setting Up E-mail System in ACT!
  - Setting Up Default History Option

## Database Security

- Database Security

- Understanding Security Roles
  - Custom Permissions
- Creating New Logon Users
  - Making Users Inactive
- Password Management
  - Defining a Global Password Policy
  - Overriding Password Policy for Individ
  - Setting a Password for Yourself
- Team Management
  - Limiting Contact Access
  - Assigning Limited Access to a Lookup
  - Lookup Contacts by Access
  - “Managers” Team
  - Changing Security for Multiple Items
- Field Security

## 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
- Importing an Excel File
  - Converting the Excel File to .CSV file
  - Importing a .CSV File into ACT!
- Cleaning up the Data
  - Duplicates
    - Tips for Dealing with Duplicates
    - Combine Duplicate Records
    - Changing Default Duplicate Checking
  - Edit, Replace
  - Edit, Swap or Copy Fields
  - Remove Old Data
- Events

## Advanced Lookups

- Activity Data Mining
- Queries
  - Lookup By Example
- Advanced Queries
  - And/Or Revisited
  - Grouping

# ***Administering ACT! 2008***

- Deleting Query Files
- Creating/Populating a Group or Company
- Adding Multiple Contacts to a Group
- Advanced Queries Companies/Groups

## ***Synchronization Maintenance***

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- Synchronizing Databases
- Administrator Tasks – Preparation
  - Determine/Setup Connection Method
  - Define Remote User(s)
  - Restore Database to Final Location
- Administrator Tasks – Creating Sync DB
  1. Enable Synchronization
  2. Manage Sync Sets
  3. Create Remote Databases
  - Prepare the Remote Database(s)
- Administrator Tasks – Turning on Sync
  - Setting Up Application Sync
  - Setting Up the Network Sync Service
  - Setting Up Internet Sync
- User Tasks – 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 – When Things Change
  - Moving Machines
  - Territory Realignment
  - Temporarily Disabling Sync
- Synchronization Troubleshooting

## ***Appendix***

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- User Roles and Permissions
- Converting an older ACT! Database
  - Standard vs. Custom Conversion

## ***Index***

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