ACT! 2008: Everyday

The Basics

- What's Contact Management Software?
  - Starting ACT!
- Log on
- Opening a Database
  - Setting Up For Class
  - Opening Other Databases
- ACT! Screen Elements
- Toolbar Buttons
- The Navigation Bar Menu
  - Layout Tabs
  - Sizing the Contact Detail Window
- Contact Record Basics
  - The “My Record” Contact Record
  - My Record
  - Our Practice Database
  - 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
- Calendar vs. Task List
- The Task List
  - Filtering the Task List
  - Creating a Lookup from the Task List
  - Task List Pop-ups
  - Displaying the Mini-calendar any time
- 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
  - Adding “Scheduled For” to Task List
- Scheduling Activities using the Calendar
- Printing the Calendar
  - Roll Over
- Sharing Outlook and ACT! Activities
  - Automatically Sync Outlook with ACT!
- Events

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