

Sage ACT! 2011: Everyday

Working With ACT! Basics	1
<i>What's Contact and Customer Management Software?</i>	2
<i>ACT! on the Web</i>	2
Starting Your ACT! Software	2
Log on	3
Opening a Database	3
ACT! Screen Elements	5
Welcome Page	5
Changing Your Startup View	5
The Nav Bar	6
View Toolbar	7
Layout Tabs	7
Layouts	8
Sizing the Contacts: Detail View Window	9
Contact Record Basics	9
The "My Record" Contact Record	10
Our Practice Database	10
An Overview of Security Roles	10
Contact Fields	11
Inserting a New Contact Record	12
Drop-down Fields	13
Duplicating Contacts	16
Assigning Security	17
Limited Access	18
Assigning Limited Access by Default	18
Deleting Contacts	19
Working with Your Contacts	21
Locating Contacts	22
Browsing Records	22
Detail View and List View	22
Sorting the List View	24
Related Task Pane – Another Sort Option	25
Adding and Removing Columns	25
Nav Bar Lookup Pane	26
Lookup	27
Wait, We Didn't Tell ACT! the Last Name	30
Lookup Variations	32
Adding to Lookups	32
Narrowing Lookups	33
Previous Lookups	34
Back (and Forward) Buttons	35
Keyword Searches	35
Lookup, Any fields	38
Lookup Annual Events	38
Working In List View Edit Mode	40
Tag Mode	40
Lookup and Omit Tagged Records	41
Printing Lookups	42
Secondary Contacts	42
Lookups on Secondary Contact Fields	44
Promoting from Within	44
Documents Tab	45
Opening and Editing Files	47
Removing Files from the Documents Tab	48

Sage ACT!

<i>Relationships</i>	48
<i>Your Contact's Website</i>	51
<i>Web Info Tab</i>	51
<i>Web Info tab - User Links section</i>	51
<i>Attaching Web Pages From Internet Explorer®</i>	53
<i>Web Info tab - ACT! Business Info section</i>	55
<i>Accessing Key Business Info for a Contact or Company</i>	56
<i>Company Profile</i>	57
<i>Importing Companies</i>	58
<i>Company Alerts</i>	59
<i>Importing Contacts</i>	59
<i>Build a List</i>	60
Working Your Schedule	63
<hr/>	
<i>ACT! vs. a PIM</i>	64
<i>Activity Types</i>	64
<i>Simple Scheduling</i>	64
<i>Adding an Outlook Meeting Request to Your Calendar</i>	69
<i>Scheduling Activities Using the Calendar</i>	70
<i>Viewing Your Calendar</i>	71
<i>Calendar Pop-ups</i>	72
<i>Navigation Tips for the Calendar Views</i>	72
<i>The Today Button</i>	73
<i>Filtering the Calendar</i>	75
<i>Printing the Calendar</i>	76
<i>Calendar vs. Task List</i>	78
<i>The Task List</i>	78
<i>Filtering the Task List</i>	79
<i>Printing Your Task List</i>	81
<i>Display the Mini-calendar Any Time!</i>	81
<i>Modifying Scheduled Activities</i>	82
<i>Clearing Activities</i>	83
<i>Recording an Unscheduled Activity to History</i>	85
<i>Recording History to Multiple Contacts</i>	87
<i>Filtering History</i>	87
<i>Taking Notes</i>	88
<i>History vs. Notes</i>	90
<i>Rolling Over Your Activities</i>	91
Advanced Scheduling	93
<hr/>	
<i>Scheduling</i>	94
<i>Scheduling for Other ACT! Users</i>	94
<i>Displaying Multiple Users in Your Calendar or Task List</i>	96
<i>Adding "Scheduled For" to Task List View</i>	97
<i>Scheduling for Multiple Contacts</i>	98
<i>Availability</i>	101
<i>Responding to an ACT! Invitation</i>	104
<i>Syncing Your Outlook Calendar and Contacts with ACT!</i>	105
<i>Calendar Syncing</i>	105
<i>Contact Syncing</i>	107
<i>Manually syncing ACT! and Outlook</i>	110
<i>Activity Colors</i>	110
<i>Alarms</i>	111
<i>Public vs. Private Activities</i>	113
<i>Attachments</i>	114
<i>Scheduling Recurring Activities</i>	115

Working Via E-mail & Letters	119
ACT! Can Help You Communicate.....	120
Setting Up Your E-mail System in ACT!.....	120
ACT!'s Integration with Outlook.....	124
Sending E-mail from the Contact	124
Sending E-mail from Outlook.....	126
Choosing a Word Processor.....	127
New Menu Item in Word.....	128
Mail-merge Templates.....	129
Creating a Mail-merge Template.....	129
Merging the E-mail Template	133
Sending an E-mail to Group or Company Members	136
Creating Letters, Memos, and Fax Cover Pages	136
Printing Documents	138
Editing the Attached Document.....	139
Envelopes and Mailing Labels.....	140
Dealing with Your Outlook Inbox.....	142
Adding an Outlook Meeting Request to Your Calendar	142
Creating a Contact from an E-mail.....	142
Attaching an E-mail to a Contact.....	144
Using the Quick Attach Feature	144
Setting Your Quick Attach Preferences.....	145
Handling Unattached Messages	146
Using the Attach to ACT! Icon.....	147
Creating an Activity from an E-Mail.....	149
Sending Contact Information as a vCard	150
Sage E-marketing For ACT!	151
Sage E-marketing for ACT! Features	152
How Is E-marketing Different from Outlook?.....	152
View Some Tracking Examples.....	153
Creating an E-marketing Account	154
Creating E-mail Templates	155
Creating your first basic Swiftpage e-mail template	155
Basic Template Editor Window.....	156
What is [[SpePersonalMessage]] ?	156
Sending the Template	157
Creating a New Template Using Your Base.....	158
What are SwiftWindows?.....	158
Editing text.....	159
Saving your SwiftWindow edit	160
Saving your template changes	160
Add a signature	161
Getting Results	162
Scoring.....	162
Marketing Results Tab.....	164
Call Lists	165
What is Drip Marketing?	165
Surveys and Web Forms	166
E-marketing and Swiftpage Help.....	166
Advanced Lookups	167
Activity Data Mining	168
Queries	169
Lookup By Example.....	169
Advanced Queries	171
Operator Options.....	172
And/Or	176

<i>Grouping</i>	177
<i>Deleting Query Files</i>	178
<i>Working With Groups & Companies</i>	179
<i>Groups</i>	180
<i>Displaying a Group Lookup</i>	180
<i>Manually Adding a Contact to a Group</i>	181
<i>Companies</i>	182
<i>Creating and Populating a Group or Company</i>	183
<i>Adding Multiple Contacts to a Group or Company</i>	185
<i>Advanced Queries for Companies and Groups</i>	188
<i>Linking Contacts and Companies</i>	190
<i>Create a Company from a Contact</i>	190
<i>Create a Contact from a Company</i>	191
<i>Disabling a Company Link</i>	191
<i>Pushing Company Changes Back to Contacts</i>	193
<i>Pulling Changes from the Company Record</i>	194
<i>Divisions and Subgroups</i>	195
<i>Cumulative Views of Notes, History, etc.</i>	196
<i>Lookup Companies or Groups</i>	197
<i>Working With Opportunities</i>	199
<i>Creating Opportunities</i>	200
<i>Opportunities tab</i>	204
<i>Updating an Opportunity</i>	204
<i>Creating a Quote</i>	205
<i>Closing the Deal</i>	207
<i>Opportunity Management</i>	208
<i>Opportunity List View</i>	208
<i>Lookup Opportunities</i>	209
<i>Export to Microsoft Excel</i>	210
<i>Opportunity Reports</i>	212
<i>Opportunity Pipeline</i>	213
<i>Opportunity Graph</i>	215
<i>Viewing Dashboards & Reports</i>	217
<i>Using Dashboards</i>	218
<i>Displaying Dashboard Views</i>	218
<i>Working in the Dashboard Views</i>	219
<i>Other Dashboards</i>	223
<i>ACT! Reports</i>	224
<i>The Anatomy of an ACT! Report</i>	226
<i>Favorite Reports</i>	228
<i>Working With Synchronization</i>	229
<i>Synchronizing Your Remote Database</i>	230
<i>Synchronizing the Remote Database</i>	230
<i>Set up a Sync Schedule with the ACT! Scheduler</i>	231
<i>Appendix</i>	233
<i>User Roles and Permissions</i>	234
<i>Understanding the ACT! E-mail Window</i>	236
<i>ACT! Word Processor</i>	240
<i>What are Smart Tasks?</i>	244
<i>Index</i>	247