

The QuickStudy Guide for Sage ACT!

Using ACT! Everyday

The Basics	3
<i>How Did “Quick” Get Included in the Book Name?</i>	4
<i>What’s Contact and Customer Management Software?</i>	5
<i>Anytime, Anywhere Access</i>	7
<i>ACT! Pro vs. ACT! Premium</i>	7
<i>Starting Your ACT! Software</i>	8
<i>ACT! Setup Assistant</i>	9
<i>Log on</i>	9
<i>Opening a Database</i>	9
<i>ACT! Screen Elements</i>	12
<i>Welcome Page</i>	12
<i>The Nav Bar</i>	13
<i>Layouts</i>	16
<i>Contact Record Basics</i>	18
<i>Inserting a New Contact Record</i>	22
Working with Your Contacts	35
<i>Locating Contacts</i>	36
<i>Detail View and List View</i>	37
<i>Lookup</i>	43
<i>Lookup Variations</i>	50
<i>Secondary Contacts</i>	64
<i>Documents Tab</i>	69
<i>Relationships</i>	73
<i>Your Contact’s Website</i>	77
<i>Web Info Tab</i>	77
<i>Web Info tab - ACT! Business Info section</i>	82
Scheduling Your Day	93
<i>ACT! vs. a PIM</i>	94
<i>Activity Types</i>	94
<i>Simple Scheduling</i>	95
<i>Adding an Outlook Meeting Request to Your Calendar</i>	101
<i>Scheduling Activities Using the Calendar</i>	102
<i>Viewing Your Calendar</i>	104
<i>Calendar vs. Task List</i>	113
<i>The Task List</i>	113
<i>Modifying Scheduled Activities</i>	118
<i>Clearing Activities</i>	120

<i>Recording an Unscheduled Activity to History</i>	123
<i>Taking Notes</i>	127
<i>History vs. Notes</i>	130
<i>Rolling Over Your Activities</i>	132

Advanced Scheduling **135**

<i>Scheduling</i>	136
<i>Scheduling for Other ACT! Users</i>	136
<i>Scheduling for Multiple Contacts</i>	141
<i>Syncing Your Outlook Calendar and Contacts with ACT!</i>	149
<i>Public vs. Private Activities</i>	161
<i>Attachments</i>	162
<i>Scheduling Recurring Activities</i>	163

Written Communications **167**

<i>ACT! Can Help You Communicate</i>	168
<i>Setting Up Your E-mail System in ACT!</i>	168
<i>ACT!'s Integration with Outlook</i>	173
<i>Choosing a Word Processor</i>	178
<i>New Menu Item in Word</i>	178
<i>Mail-merge Templates</i>	180
<i>Merging the E-mail Template</i>	186
<i>Creating Letters, Memos, and Fax Cover Pages</i>	190
<i>Envelopes and Mailing Labels</i>	195
<i>Dealing with Your Outlook Inbox</i>	198
<i>Adding an Outlook Meeting Request to Your Calendar</i>	198
<i>Creating a Contact from an E-mail</i>	199
<i>Attaching an E-mail to a Contact</i>	201
<i>Sending Contact Information as a vCard</i>	208
<i>Understanding the ACT! E-mail Window</i>	209
<i>ACT! Word Processor</i>	214

ACT! E-marketing **221**

<i>ACT! E-marketing Features</i>	222
<i>How Is ACT! E-marketing Different from Outlook?</i>	222
<i>Creating an E-marketing Account</i>	225
<i>Creating E-mail Templates</i>	226
<i>Basic Template Editor Window</i>	228
<i>Sending the Template</i>	229
<i>Creating a New Template Using Your Base</i>	231
<i>Getting Results</i>	236
<i>Marketing Results Tab</i>	239
<i>Call Lists</i>	240
<i>What is Drip Marketing?</i>	240

Surveys and Web Forms243
 E-marketing and Swiftpage Help.....246

Advanced Lookups 247

Activity Data Mining248
 Queries249
 Lookup By Example.....250
 Advanced Queries252

Groups & Companies 263

Groups264
 Companies.....267
 Creating and Populating a Group or Company269
 Divisions and Subgroups.....285
 Cumulative Views of Notes, History, etc.288
 Lookup Companies or Groups.....292

Opportunities 295

Creating Opportunities.....296
 Updating an Opportunity.....302
 Creating a Quote303
 Closing the Deal306
 Opportunity Management.....306
 Opportunity Reports313

Viewing Dashboards & Reports 317

Using Dashboards318
 ACT! Reports325
 The Anatomy of an ACT! Report.....327

Customizing ACT!

Database Design & Layouts	333
<i>Creating a New Database</i>	334
<i>Field Attributes</i>	337
<i>Manage Drop-down Lists</i>	348
<i>Editing the Database Structure</i>	354
<i>Field Security</i>	355
<i>Creating New Fields for Other Entities</i>	360
<i>Defining and Modifying Layouts</i>	361
<i>Testing Your Layouts</i>	381
<i>Customizing the Product View</i>	384
Feature Customizations	385
<i>Customizing Menus and Toolbars</i>	386
<i>Creating Custom Web Info Links</i>	392
<i>Priorities</i>	393
<i>Creating New Activity Types</i>	396
<i>Events</i>	398
<i>Creating a Custom Opportunity Process</i>	399
Activity Series & Smart Tasks	405
<i>Activity Series</i>	406
<i>What are Smart Tasks?</i>	412
<i>Creating a Smart Task</i>	414
Designing Dashboard & Reports	429
<i>Creating Your Own Dashboards</i>	430
<i>Report Templates</i>	435
<i>Adding Report Objects</i>	439
<i>Report Filters</i>	456
<i>Using Custom Reports</i>	458
<i>Using Scripting in Your Reports</i>	459

Administering ACT!

Setting Up	469
<i>Using Available Documentation</i>	470
<i>Enabling Your Database for Multiple Users</i>	470
<i>Examining Structure</i>	471
<i>Pre-Install Checklist</i>	476
Database Security	477
<i>Database Security</i>	478
<i>Understanding Security Roles</i>	478
<i>Creating New Users</i>	480
<i>Password Management</i>	483
<i>Team Management</i>	488
<i>Field Security</i>	496
Database Maintenance	497
<i>Database Preferences</i>	498
<i>File Locations for a Multi-user Database</i>	501
<i>General Database Maintenance</i>	502
<i>Importing an Excel File</i>	517
<i>Cleaning Up the Data</i>	521
Synchronization	527
<i>Synchronizing Databases</i>	528
<i>Administrator Tasks – Setting Up the Sync Environment</i>	529
<i>Administrator Tasks – Creating the Sync Databases</i>	530
<i>Administrator Task – Turning On Synchronization</i>	536
<i>User Tasks – Restoring and Syncing Your Database</i>	540
<i>Administrator Task – Territory Realignment</i>	545
<i>Synchronization Troubleshooting</i>	546
Appendix	547
<i>User Roles and Permissions</i>	548
<i>Converting an Older ACT! Database-Custom Conversion</i>	550
<i>Using the OLE DB2 Provider</i>	553
Index	555