

ACT! 2010: Everyday

Working With ACT! Basics

What's Contact Management Software?

Starting ACT!

Log on

Opening a Database

Setting Up For Class

Opening Other Databases

ACT! Screen Elements

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Changing Your Startup View

The Nav Bar

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Sizing the Contact Detail Window

Contact Record Basics

The "My Record" Contact Record

My Record

Our Practice Database

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Inserting a New Contact Record

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Assigning Security

Changing Some Preferences

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Narrowing Lookups

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Lookup, Any fields

Lookup Annual Events

Working In List View

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Web Info Tab

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Simple Scheduling

Scheduling Activities using the Calendar

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Navigation Tips for the Calendar Views

The Today Button

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Adding an Outlook Meeting to Calendar

Sharing Microsoft Outlook and ACT!

Calendar vs. Task List

The Task List

Filtering the Task List

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Display the Mini-calendar any time!

Modifying Scheduled Activities

Clearing Activities

Recording History

Recording History to Multiple Contacts

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Viewing and Editing Notes

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Deleting a Note or History

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Scheduling for Multiple Contacts

Scheduling Availability Tab

Responding to an ACT! Invitation

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Responding to an Alarm

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Advanced Options

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Public vs. Private Activities

ACT! 2010: Everyday

- Scheduling Activities for Other Users
- Displaying Other Users' Activities
- Adding "Scheduled For" to Task List
- Printing the Calendar
- Roll Over
- Events

Working with E-mail and Letters

- ACT! Can Help You Communicate
 - ACT!'s E-Mail Integration
 - Setting Up Your E-mail in ACT!
- ACT!'s Integration with Outlook
 - Sending E-mail from the Contact
 - Sending an E-mail from Outlook
- Choosing a Word Processor
- New Menu Item in Word
- Creating Correspondence
 - Creating a Mail-Merge Template
- Merging the E-mail Template
- Creating Letters, Memos, and Faxes
 - Printing Documents
 - Editing the Attached Document
- Envelopes and Mailing Labels
- Dealing With Your Outlook Inbox
- Adding an Outlook Meeting Request
 - Creating a Contact from an E-mail
 - Attach an E-mail to a Contact
 - Using the Quick Attach Feature
 - Setting Your Quick Attach Preferences
 - Handling Unattached Messages
 - Using the Attach to ACT! Icon
 - Creating an Activity from an E-Mail
- Sending Contact Information as a vCard
- ACT! Reports
 - Favorite Reports

Working With Groups & Companies

- Groups
 - Displaying a Group Lookup
 - Manually Adding a Contact to a Group
- Companies
 - Creating/Populating a Group or Company
 - Adding Multiple Contacts
 - Using Criteria for Your Groups
 - Linking Contacts to Companies
 - Create a Company from a Contact
 - Difference between Link and Associate

- Create a Contact from a Company
- Disabling a Company Link
- Pushing Changes Back to Contacts.
- Pulling Changes from Company Record
- Convert a Group to a Company
- Divisions and Subgroups
 - Move or Promote a Division
- Cumulative Views of Notes, History, etc.
 - Company Note or History
 - Sharing Items with a Company/Group
 - Changing Companies
 - Filtering Tabs
- Lookup Companies or Groups

Working with Opportunities

- Creating Opportunities
 - Updating an Opportunity
 - Creating a Quote
 - Closing the Deal
- Opportunities: List View
 - Lookup Opportunities
 - Export to Microsoft Excel
- Opportunity Reports
 - Opportunity Pipeline
 - Opportunity Graph

Working with Dashboards

- Using Dashboards
 - Displaying Dashboard Views
 - Working in the Dashboard Views.
 - Other Dashboards

Working with Synchronization

- Synchronizing Your Remote Database
 - Synchronizing the Remote Database
 - Set up Sync Schedule with Scheduler
 - Using the Subscription List

Appendix

- Understanding Security Roles
- ACT!'s E-Mail
 - Setting Up Your E-mail Signature
 - Understanding ACT! E-mail
 - Sending E-mail from ACT! E-mail
 - Send/Receive Button
- Automatic Update Notification