

Sage ACT! 2011: 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
- Welcome Page
 - Changing Your Startup View
- The Nav Bar
 - View Toolbar
 - Layout Tabs
- Layouts
 - 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 Some Preferences
 - Deleting Contacts

Working Your Contacts

- Locating Contacts
 - Browsing Records
- Detail View and List View
 - Sorting the Contact List
 - Related Task Pane
 - Adding and Removing Columns
- Nav Bar Lookup Pane
- Lookup
- Lookup Variations
 - Adding to Lookups
 - Narrowing Lookups
 - Previous Lookups
 - Back and Forward Buttons
 - Keyword Searches
 - Lookup, Any fields
 - Lookup Annual Events
- Working In List View
 - Edit Mode

- Tag Mode
- Lookup and Omit Tagged Records
- Printing Lookups
- Secondary Contacts
 - Lookups on Secondary Contact Fields
 - Promoting From Within
- Documents Tab
 - Opening and Editing Files
 - Removing Files from the Documents Tab
- Relationships
- Web Info Tab
 - User Links Sections
 - Attaching Web Pages from Internet Explorer
- Web Info Tab - Business Info Section
 - Accessing Key Business info for a contact or a company
 - Company Profile
 - Importing Companies
 - Company Alerts
 - Importing Contacts
 - Build a list

Working Your Schedule

- ACT! vs. a PIM
- Activity Types
- Simple Scheduling
- Adding an Outlook Meeting to Calendar
- Scheduling Activities using the Calendar
- Viewing the Calendar
 - Calendar Pop-ups
 - Navigation Tips for the Calendar Views
 - The Today Button
 - Filtering the Calendar
 - Printing the Calendar
- Calendar vs. Task List
- The Task List
 - Filtering the Task List
 - Printing Your Task List
 - Display the Mini-calendar any time!
- Modifying Scheduled Activities
- Clearing Activities
 - Recording an unscheduled Activity to History
 - Recording History to Multiple Contacts
- Taking Notes
 - Viewing and Editing Notes

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History vs. Notes
Deleting a Note or History
Rolling over Your Activities

Handling Unattached Messages
Using the Attach to ACT! Icon
Creating an Activity from an E-Mail
Sending Contact Information as a vCard

Advanced Scheduling

Scheduling for Other ACT! users
 Displaying Multiple Users in your
 Calendar or Task List
 Adding "Schedule For" to the Task List
Scheduling for Multiple Contacts
 Availability Tab
 Responding to an ACT! Invitation
Syncing your Outlook Calendar and
 Contacts to ACT
 Calendar Syncing
 Contact Syncing
 Manually syncing ACT! and Outlook
 Activity Colors
Alarms
Public vs. Private Activities
Attachments
Scheduling-Recurring Activities

Working via E-mail and Letters

ACT! Can Help You Communicate
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
Mail-merge Templates
 Creating a Mail-Merge Template
Merging the E-mail Template
 Sending the e-mail to Group or
 Company Members
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 to
 your calendar
Creating a Contact from an E-mail
Attach an E-mail to a Contact
 Using the Quick Attach Feature
 Setting Your Quick Attach Preferences

Advanced Lookups

Activity Data Mining
Queries
Lookup by Example
Advances Queries
 Operator Options
 And/Or
 Grouping
 Deleting Queries

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 to a Group of
 Company
 Advanced Queries for Companies and
 Groups
 Linking Contacts to Companies
 Create a Company from a Contact
 Create a Contact from a Company
 Disabling a Company Link
 Pushing Changes Back to Contacts.
 Pulling Changes from Company Record
Divisions and Subgroups
 Move or Promote a Division
Cumulative Views of Notes, History, etc.
Lookup Companies or Groups

Working with Opportunities

Creating Opportunities
 Opportunity Tab
Updating an Opportunity
Creating a Quote
Closing the Deal
Opportunity Management
 Opportunities: List View
 Lookup Opportunities
 Export to Microsoft Excel
Opportunity Reports

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Opportunity Pipeline
Opportunity Graph

Working with Dashboards & Reports

Using Dashboards
 Displaying Dashboard Views
 Working in the Dashboard Views.
 Other Dashboards
ACT! Reports
 Anatomy of an ACT! Report
 Favorite Reports