

Customizing ACT! 2010

Database Design & Layouts

- Creating a New Database
 - Customizing Fields
- Field Attributes
 - Enter field name and type
 - Customize field and list behavior
 - Customize field behavior
 - Set field triggers
- Manage Drop-down Lists
 - Creating Drop-down Lists for Importing
 - Importing the Drop-down List
 - Minor Changes to the Drop-down List
- Editing the Database Structure
- Field Security
- Creating New Fields for Other Entities
- Defining and Modifying Layouts
 - Designing Layouts
 - Saving Layouts
 - The Tool Palette/Formatting Toolbar
 - Modifying Layouts
 - Renaming the Field Labels
 - Moving and Aligning Objects
 - Adding New Fields to Your Layout
 - Layout Tabs
 - Adding Other Objects
 - Formatting
 - Changing Background Tab Color
 - Make Same Width or Height
- Testing Your Layouts/Field Entry Order

Customized Templates

- Choosing a Word processor
- ACT!'s Menu Item in Word
- Creating a Mail Merge Template
 - The EmailBody Template
 - Merging the Template with a Lookup
- Envelopes and Mailing Labels
- ACT! E-marketing
 - Creating Your First Swiftpage Template
 - What is an [[SPEPersonalMessage]]?
- Sending the Template
- Creating a New Template Using Your Base
- E-marketing and Swiftpage Help
- ACT! Word Processor
 - ACT! Toolbar, Ruler, Status Bar
 - Tables
 - Graphics

Designing Dashboards

- Using and Displaying Dashboards
- Creating Custom Dashboards
 - Custom Components

Feature Customizations

- Customizing Menus and Toolbars
 - Editing a Custom Command
 - Resetting Toolbars, Menus, Keyboard
- Customizing the Welcome Page
- Modifying the Nav Bar
- Creating Custom Web Info Links
- Customizing Priorities
- Creating New Activity Types
- Creating and Scheduling Activity Series
- Other Opportunity Customizations
 - Creating a Custom Process
 - Creating Defined Product Lists
 - Editing the Quote Template
- Mapping ACT! Fields into Microsoft Excel
 - Preparing/Merging the Excel File

Running & Designing Reports

- ACT! Reports
 - Favorite Reports
- Report Templates
 - The Report Designer Screen
 - The Report and Page Header Sections
 - The Detail Section
 - The Report and Page Footer Sections
- Adding Report Objects
 - Formatting
 - Fields and Labels
 - Sizing Sections
 - Group By for Sorting or Subtotals
 - Section Behavior
 - Summary Fields
 - Subreports
- Report Filters
 - Using Custom Reports
- Using Scripting in Your Reports
 - Removing Blank Space Between Fields
 - Printing Checkmarks for Yes/No Fields
 - Choose Home or Business on the Fly!

Appendix

- Layout and Report Properties