

Course 2 - Administrators Course

When to use ACT Premium

- ◆ The file size advantages of Premium
- ◆ The additional features ACT Premium offers

Access levels in ACT

- ◆ Private contacts and activities
- ◆ Public contacts
- ◆ Limited access contacts

Teams on ACT Premium

- ◆ The advantages of using teams
- ◆ Creating a team
- ◆ Assigning users to a team
- ◆ Deleting a team
- ◆ Adding single and multiple contacts to teams

Creating a new database or modifying an existing database

- ◆ The key steps in creating a database
- ◆ The database file structure
- ◆ Importing data into ACT
 - From Outlook
 - From Excel or other spreadsheets
- ◆ Adding and formatting fields
- ◆ The different field types and their behaviour
- ◆ Specifying field formats
- ◆ Using drop down lists and specifying how they are to be used
- ◆ Modifying the custom opportunity fields
- ◆ Modifying all the drop down lists in activities, opportunities and fields
- ◆ Adding new activity types

Modifying ACT Layouts

- ◆ Tools to use
- ◆ Adding and removing fields
- ◆ Moving fields around, alignment and spacing tools to use
- ◆ Customising tool bars command lists
- ◆ Creating custom commands

Reports in ACT

- ◆ Basic reporting concepts
- ◆ The range of standard reports and where to use them
- ◆ Generating reports
- ◆ Modifying reports
 - Adding field and labels
 - Using the reports toolbox
 - Different sections in reports
 - Sub-reports
 - Adding system fields
 - Adding calculations
- ◆ Creating new reports
- ◆ Stepping outside the square with SQL reporting

Database administration

- ◆ The importance and steps in basic computer maintenance
- ◆ Backup requirements and procedures
- ◆ Creating users
- ◆ Managing security levels and user options
- ◆ Finding and removing duplicates
- ◆ Importing and exporting data
- ◆ Configuring preferences
 - General Preferences
 - Colours and Font
 - Name preferences
 - Calendar and scheduling preferences
 - Email systems and preferences
 - Communication preferences
 - Start-up preferences
- ◆ Auto backup and synchronisation in ACT Premium
- ◆ Different types of synchronisation
- ◆ Granting calendar access to standard users
- ◆ Sharing a database
- ◆ Re indexing the database
- ◆ Check and repair the database
- ◆ Removing old data. Why and how often
- ◆ Deleting a database
- ◆ Moving a database to another computer

Synchronising with Palm and Pocket PC

- ◆ Install the appropriate link program from the ACT disk # 1
- ◆ Manage the synchronisation process.