

ACT! 2009: Advanced

1 day

Description

You have gained the basic skills required to organize contact information in a database. In addition to organizing and working with data, you might also want to retrieve specific information about your contacts, send email to them, and also maintain information without any data loss. In this course, you will customize the ACT! 2009 environment, query and exchange data, administer the database, work with templates and the ACT! word processor, use the email and Internet features, and integrate the Outlook and ACT! calendars.

You will customize the ACT! 2009 environment, query and exchange data, work with templates, administer ACT!, and use its Internet features.

Prerequisites

- ACT! 2009: Basic

Course Outline

Lesson 1: Customizing the ACT! 2009 Environment

- Topic 1A: Specify the Startup Preferences
- Topic 1B: Customize Fields in a Database
- Topic 1C: Customize Layouts
- Topic 1D: Customize the Dashboard
- Topic 1E: Modify Menus and Keyboard Shortcuts
- Topic 1F: Automate Important Tasks

Lesson 2: Creating Queries

- Topic 2A: Perform a Lookup Based on Multiple Criteria
- Topic 2B: Create Advanced Queries

Lesson 3: Administering the ACT 2009 Database

- Topic 3A: Import Data
- Topic 3B: Export Data
- Topic 3C: Transfer Data to a Pocket PC
- Topic 3D: Manage Data Security
- Topic 3E: Perform Database Maintenance

Lesson 4: Working with Report Templates

- Topic 4A: Generate Reports Using a Standard Report Template
- Topic 4B: Generate Reports Using a Custom Report Template
- Topic 4C: Generate Opportunity Reports

Lesson 5: Working with the ACT! Word Processor

- Topic 5A: Create a Template for Mail Merge
- Topic 5B: Generate Form Letters

Lesson 6: Integrating ACT! 2009 with Email

- Topic 6A: Set Up an Email System in ACT!
- Topic 6B: Send an Email from the Notes Preview Pane
- Topic 6C: Transfer Information from an E-mail Client into ACT!

Lesson 7: Working with Calendars

- Topic 7A: Integrate the Outlook and ACT! Calendars
- Topic 7B: Set Alarms

Lesson 8: Using the Internet Features in ACT!

- Topic 8A: Create Web Page Attachments
- Topic 8B: Generate Maps and Driving Directions