

# ACT! 6: Intermediate

## ***Scheduling and Other Features***

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*Setting Up For Class*  
*Activity Series*  
    *Roll Over*  
*Sharing Outlook and ACT! Activities*  
*SideACT!*  
    *Clear a SideACT! Activity*  
    *Move/Copy SideACT! items to ACT!*  
    *SideACT! Scenarios*  
*Attachments*

## ***E-mail***

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*You've Got Mail*  
    *Setting up E-mail System in ACT!*  
    *Creating a Contact from an E-mail*  
    *Attach an E-mail to a Contact*  
*Sending E-mail*  
    *Adding ACT! Address Book to Outlook*  
    *Setting up the Default History Option*  
    *Attaching E-mail to ACT! from Outlook*

## ***Library***

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*The Library Tab*  
    *Adding Documents to the Library*  
    *Viewing Library Files*  
*Editing Library Documents*  
*Mapping ACT! Fields to Excel*  
    *Preparing the Excel File*  
    *Display for All*

## ***Working With Groups***

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*Reviewing Groups*  
    *Viewing a Group*  
    *Changing Group Membership for a Contact*  
    *Group Rules*  
    *Running the Rules*  
*Using Groups Creatively*  
    *Group Use Scenario*  
    *Group Activities*  
    *Filtering Notes*  
    *Add Columns to View*  
    *Group Notes*  
    *Associating Notes with a Group*

## ***Designing Database & Layouts***

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*Customizing Contact Fields*  
    *The Attributes Tab*  
    *The Drop-down Tab*  
    *Drop-down Lists for Importing*  
    *Minor Changes to the Drop-down List*  
    *Editing the Database Structure*  
    *The Triggers Tab*  
    *Group User Fields*  
    *Add Columns to the Groups Tab*  
*Defining and Modifying Layouts*  
    *Defining and Modifying Layouts*  
    *Saving Layouts*  
    *The Tool Palette*  
    *Modifying Layouts*  
    *Moving Objects*  
    *Aligning Objects*  
    *Adding Items to Your Layout*  
*Layout Tabs*  
    *Adding Text*  
    *Formatting Layouts*  
    *Testing Your Layouts*  
    *Field Entry Order*  
    *Group Stops*  
    *Changing from Gray to Beige*

## ***Designing Reports***

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*Report Templates*  
*The Report Design Screen*  
    *The Header Section*  
    *The Contact Section*  
    *The Footer Section*  
    *Adding Report Objects*  
    *Formatting Reports*  
    *Print Preview*  
    *Sizing Sections*  
    *Summary Sorted By*  
    *Section Options*  
    *Summary Fields*  
    *More Sections*  
    *Object Source Information*  
    *Report Filters*  
    *Scrunching Fields*  
    *Using Custom Reports*  
    *Adding the Report to the Menu*

# **ACT! 6: Intermediate**

## ***Customizing ACT!***

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### *Macros*

*Recording a Macro*  
*Running a Macro*  
*Assigning Macros to Toolbars/Menus*  
*Assign a Command to a Toolbar*  
*Assign a Command to a Menu*  
*Shortcut Keys*  
*Resetting Toolbars, Menus, Keyboard*  
*Deleting a Macro*

### *Queries*

*Lookup By Example*  
*Creating Advanced Queries*  
*The Query Helper*  
*Adding a Custom Query to the Menu*  
*Deleting Query Files*

## ***Synchronization***

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### *Synchronizing Databases*

- 1. Determine the Connection Method*
- 2. Set up Sync Folders or E-mail*
- 3. Determine What Will be Synced*
- 4. Define Users*
- 5. Create Database(s) to Synchronize*
- 6. Set up Synchronization*
- 7. Perform the Synchronization*
- 8. Tell ACT! Where Sync Packets Are*
- 9. Synchronize*

### *Automatic Synchronization*

## ***Appendix***

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### *Database Administration*

*Creating Users*  
*Deleting a Database*  
*Database Maintenance*