

ACT! 6: Administrator

You were just sitting there one day, minding your own business, and your boss tapped you on the shoulder and said, “You know a lot about computers. We’re making you our new ACT! Administrator.”

Yikes! How do you “administer” an ACT! database? What do you need to know? How much time will it take? We hope to answer these questions (and more) in this course. ACT! is a very easy product to maintain. The step-by-step instructions that you will find in this course should help speed the process.

To be an ACT! database administrator, you don’t really need to know a lot about how to use the software...but it helps. To assist your company’s employees in getting the most out of the product, we recommend that you be familiar with the concepts taught in both the Introduction and the Advanced courses. However, this course focuses on how you can most effectively take care of the database... install and setup the system, maintain the data with a regular maintenance schedule, modify the structure as required, setup reliable syncs, and provide meaningful and time saving customizations in order to free up your sales team to do what they do best...make those contacts.

The Basics

So You Get to be the ACT! Administrator
What's Contact Management Software?
Starting ACT!
Setting Up For Class
Contact Record Basics Review
The Anatomy of a Record
The “My Record” Contact Record
“I Feel So Us(er)ed”
Adding Users
Creating New Users
Deleting Users
Examining Structure
Directory Structure
File Structure

Setting Up

Using Available Documentation
Using the ACT! Knowledge Base
Preparing the Server
Opportunistic Locking
Novell Netware Issues
Windows NT/2000 Issues
Drive Mappings
Systems Check
Minimum System Requirements

*Supported Operating Systems,
Networks, and Programs*
Network Cards and Windows 98
10-Digit Dialing
Systray Check
Config.sys settings
Screen Area and Large fonts
Local Administrator Rights
Installing
Upgrading ACT! Versions
*Upgrading ACT! Versions (only for 5
or 2000 versions of ACT!)*
Save SideACT!
The Need for Speed
ACTDiag
Removing Temp Files
Load Contacts
*Record Update Frequency (5 or 2000
Versions Only)*
Disk Defrag and Scandisk
ACT! Preferences
Choosing a Word Processor
File Locations
Controlling Activities
Wait, We Didn’t Tell ACT! the Last Name
Prefixes and Suffixes
Startup

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Setting Up an E-Mail System in ACT!
Troubleshooting E-mail Connectivity
Send/Receive Button
Need for Speed (continued)
Checking and Closing Tab Filters
Speeding Up Contact List View
Filtering the Calendar and Task List Views
Sharing Outlook and ACT! Activities
Filtering Group Notes
Verify Connectivity
Adding ACT! Address Book to Outlook
Setting Up the Default History Option for Outlook

Dealing with Data

Populating the Database
Importing from an Excel Spreadsheet
Importing into a Group
Importing Outlook Data
Is Your Database Indexed Properly?
Syncing
Importing – Advantages and Disadvantages
Criteria for a Successful Import
Fixing Problem Names
The Salutation Field
Duplicates
Duplicate Definition
Scanning for Duplicates
Manually Identify the Duplicates
Merging Lots of Duplicates
Deleted Records
Effect on a Database
Compressing the Database
Deleted Records and Synchronization
Edit Replace
Swap or Copy

Regular Maintenance

Backup
Restoring a Backup
File, Administration
Setting a Password for Yourself
Database Maintenance & Repair

Data Cleanup
Tilde Bug
Deleting A Database
Reminders
Group Rules
Running the Rules
ACTDiag
Removing Index Files
Resetting ACT! Windows and Toolbars
Resetting ACT! Windows Options
Undelete Records
Disaster Recovery (Scan & Repair)

Modifying Database Design & Layouts

Customizing Contact Fields
Preparing for Changes
Define Fields Dialog
The Attributes Tab
The Drop-down Tab
Creating Drop-down Lists for Importing
Minor Changes to the Drop-down List
Editing the Database Structure
The Triggers Tab
Using Groups Creatively
Group User Fields
Add Columns to the Groups Tab
Deleting a Field – NOT
Create a Definition Database
Defining and Modifying Layouts
Creating Design 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

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Synchronization

Synchronizing Databases

- 1. Determine the Connection Method*
- 2. Set up Synchronization Folders or E-mail Addresses*
- 3. Determine What Will Be*

Synchronized

- 4. Define Users*
- 5. Create Database(s) With Which to Synchronize*
- 6. Set up Synchronization*
- 7. Perform the Synchronization*
- 8. Tell ACT! Where Sync Packets Will Be Located*

9. Synchronize

E-mail Synchronization

Automatic Synchronization

Synchronizing - Advantages and Disadvantages

Troubleshooting

Evil Twins

Number of Records Don't Match

E-Mail Packages

Sync Folders

Date, time, and time zones

Disk space requirements

Backdating the Sync

Other Sync Options

Database to Database Synchronization

Syncing Sales Opportunity Information

Importing Products into Sales

Opportunities

Modifying Sales Stages

Syncing Groups

Regular Groups

Collection Groups

Group Territory Realignment

Customizations

Custom Templates

Creating a Custom Document Template

Using a Custom Template

Word Macros

Merging the Custom Template to a

Lookup

Envelopes and Mailing Labels

Printing in Zip Code Order

Hidden Text

Repairing Deleted Hidden Text

Attachments

Attachment Problems

Customizing the Basic E-Mail Template

Signatures

Formatting E-Mail Templates

Insert Hyperlink

Creating HTML E-mail Templates

Report Templates

The Report Design Screen

The Header Section

The Contact Section

The Footer Section

Adding Report Objects

Print Preview

Sizing Sections

Changing Field Properties

Closing up blank space

Summary Sorted By

Section Options

Summary Fields

More Sections

Object Source Information

Report Filters

Using Custom Reports

Adding the Report to the Menu

Limitations of ACT! Reports

History vs. Notes vs. Activities

Adding the History Icon to the Toolbar

Some Report Names are Important

Salesman Not Available for Filtering

Reports

Advanced Reports

Page Breaks

Inserting a Graphic in a Report

Sales Opportunities

Sales Reports

Macros

Recording a Macro

Running a Macro

Assigning Macros to Toolbars and

Menus

Assign a Command to a Toolbar

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Assign a Command to a Menu
Assign Shortcut Keys to a Command
Resetting Toolbars, Menus, and the Keyboard
Deleting a Macro
Queries
Lookup By Example
Creating Advanced Queries
The Query Helper
Adding a Custom Query to the Menu
Deleting Query Files
Creating Your Own Internet Links
The Library Tab
Adding Documents to the Library
Display for All
Mapping ACT! Fields into Excel
Preparing the Excel File
Distributing Customizations

Appendix

Creating a Database
Using ACT! with the Palm
Maintenance Manual
Server Checklist
ACT! Workstation Setup
Steps for Modifying the Database Design
Setting Up a New Sync Process Checklist
ACT! Error Logging
To Sync by Shared Folder
To Sync by E-Mail
Sync Troubleshooter
Stars R Us Database Structure