

# ACT! 6: Upgrade

## ***The Basics***

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*Starting ACT!*  
*Login*  
*Opening a Database*  
*Setting Up For Class*  
*ACT! Screen Elements*  
*Toolbar Buttons*  
*Layouts*  
*Layout Tabs*

## ***E-mail***

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*You've Got Mail*  
*Setting Up Your E-mail System in ACT!*  
*Understanding the New ACT! E-mail Window*  
*Send/Receive Button*  
*Reading Your E-mail*  
*Creating a Contact from an E-mail*  
*Attach an E-mail to a Contact*  
*Sending E-mail*  
*...from the ACT! E-mail Window*  
*...from the ACT! Contact Record*  
*...from Outlook*  
*Adding ACT! Address Book to Outlook*  
*Setting Up the OutlookHistory Option*  
*Attaching Outlook E-Mail to ACT!*

## ***Mail-Merge Wizard***

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*Creating Letters, Memos, and Faxes*  
*Custom Templates*  
*Creating a Custom Document Template*  
*Merging Template w/ Current Contact*  
*Merging the Template with a Lookup*  
*Hidden Text in Microsoft Word*  
*Repairing Deleted Hidden Text*  
*ACT! Word Processor*  
*Customizing the Basic E-Mail Template*  
*Signatures*  
*Formatting E-Mail Templates*  
*Insert Hyperlink*  
*E-Mail Merge*

## ***Internet Services***

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*Internet Services*  
*Reviewing Internet Services Window*  
*Adding to Your Favorites*  
*The Online Menu*  
*Attaching Web Pages*

## ***Library***

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

## ***Keeping Track***

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*Task List vs. Calendar*  
*Using the Calendar*  
*Calendar Pop-ups*  
*Navigating Tips for the Calendar Views*  
*The Task List*  
*Filtering the Task List or Activities Tab*  
*Adding and Removing Columns Scheduled For*  
*History vs. Notes vs. Activities*  
*Recording Unscheduled Activity*  
*Recording History to Multiple Contacts*  
*Adding the History Icon to the Toolbar*  
*Lookup Contact Activity*  
*Minor Report Changes*  
*Tracking Annual Events*  
*New Birth Date Field in ACT!*  
*The Contact List*  
*Sorting the Contact List*  
*Adding and Removing Columns*  
*Alarms*  
*Responding to an Alarm*  
*SideACT! Alarms*

## ***Database Administration***

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*Backup*  
*Restoring a Backup*  
*Database Maintenance & Repair*  
*Data Cleanup*  
*Need for Speed*  
*Checking the Checks on Notes/History*  
*Speeding Up Contact List View*  
*Filtering Group Notes*  
*Populating the Database*  
*Importing from an Excel Spreadsheet*  
*Importing into a Group*  
*Importing Outlook Data*