

The Official
ACT!
by Sage
QuickStudy Guide

A

ACT! E-mail. See E-mail
 ACT! Link for Palm, 494
 ACT! Link for Pocket PC, 5, 494
 ACT! Premium for Web, 5
 ACT! Scheduler, 453, 489

- Backup, 453
- Database Maintenance, 463
- Log, 464
- Synchronization, 489
- Updating Outlook, 133

ACT! Software Update, 450
 ACT! Word Processor, 206, See Word Processor

Activities, 78

- Alarms, 138, 140
- Attaching a File, 143
- Clearing, 103
- Color, 137
- Creating from an E-mail, 198
- Details, 84
- General Tab, 118
- Granting Calendar Access, 118
- Invitations, 79, 127
- Modifying, 102
- New Types, 148
- Priorities, 135
- Public vs. Private, 142
- Recurring, 144
- Rollover, 114
- Scheduling, 79, 86
- Scheduling for Others, 118, 119, 121
- Scheduling Multiple Contacts, 123

Activity Lookup, 238
 Activity Series, 149

- Creating, 150
- Using, 154

Add Columns to View, 38
 Add Document, 65
 Adding Fields

- Layout, 427
- Report, 339

Adding Text

- Layout, 432

Adding Users, 372
 Address, 394
 Address Labels, 360, 364

Administration

- Back Up, 452
- Database Maintenance, 450, 462
- Delete Database, 461
- Multi-User Database, 440
- Password, 379
- Software Updates, 450

Administrator Role, 370
 Advanced Query

- Defined, 242

Alarm, 138, 140, 141

- Clear, 141
- Snooze, 140

Aligning Objects, 425
 Allow Blank, 396
 Allow Multi-select, 397
 Alternate Contacts. See Secondary Contacts
 Anniversary, 55
 Annual Event, 55, 394
 Application Sync, 482
 Attach

- File, 65, 83, 105, 107, 110, 143
- Shortcut, 65, 83, 105, 107, 110, 143

Attach document to history, 182
 Attach Web Page, 74
 Attachments, 183

- .mht extension, 75
- Company, 204
- Contacts, 204
- E-mail, 204
- File, 204
- Group, 204
- Web Page, 74

Availability, 127

B

Back Up, 452

- Automatic, 453
- Database Files, 452
- Manual, 455
- Personal Files, 452
- Restore, 457

Background Color, 434
 Birthday, 21, 55
 Blackberry, 5
 Browse Role, 371
 Browsing Records, 34

C

Calendar, 87
 Activity Series, 149
 Calendar Pop-ups, 88
 Daily, 91
 Filter, 94, 120
 Monthly, 88
 Navigating, 89
 Printing, 95
 Rollover, 114
 Scheduling Activities, 86
 Task List Comparison, 97
 Today Button, 90
 Weekly, 92
 Work Week, 91
 Calendar Sharing
 Outlook, 131
 Call Lists, 230
 Calls. *See* Activities
 CH TechONE, 18
 Character, 394
 Check and Repair, 462
 Citrix, 5
 Clear Alarm, 141
 Clearing Activities, 103
 Close an Opportunity, 301
 Columns
 Adding, 38
 Companies, 257
 Add Members, 262
 Associating Activity or Opportunity, 280
 Convert a Group, 275
 Create, 259
 Create a Contact From, 268, 270
 Defining Linked Fields, 400
 Disabling a Link, 271
 Divisions, 276
 Dynamic, 261
 History, 278
 Linked, 261
 Linked Activities/Opportunities, 269
 Linked Notes/History, 269
 Linking Contacts, 267
 Lookup, 283
 Note, 278
 Preferences for Sharing Notes/Histories, 270
 Promoting Divisions, 277
 Pulling Changes From Companies, 274

Pushing Changes to Contacts, 272
 Sharing a Note, 279
 Static, 261
 View Linked Fields, 274
 Completing Activities, 103
 Contact, 17
 Attach E-mail, 190, 194
 Browsing, 34
 Create Company From, 268
 Create from a Company, 270
 Creating from an E-mail, 188
 Delete, 30
 Duplicating, 26
 Linked, 261
 Linking to Companies, 267
 Locating, 34
 New, 21
 Pulling Changes from Companies, 274
 Saving, 21
 Contact Access. *See* Security, *See* Security
 Lookup By, 386
 Contact Activity, 238
 Contact Detail View, 35, *See* Layout
 Contact Fields. *See* Fields
 Contact Layout. *See* Layout
 Contact Layout Design. *See* Layout
 Designer
 Contact List View, 35
 Displaying Columns, 38
 Edit Mode, 56
 Sorting, 37
 Tag Mode, 57
 Copy Calendar Now, 131
 Copy/Move Contact Data, 466
 Create History, 182, 204
 Create New User, 373, 374
 Create Remote Database, 479
 Create Separate Activities, 125
 Creating a Letter, 180
Currency, 290, 391, 394
 Custom Activity Type, 148
 Custom Permissions, 371

D

Dashboard, 314
 Breakpoint, 324
 Changing Views, 314
 Creating, 321
 Custom Components, 324

- Target, 324
- Data Cleanup, 465
- Database
 - Add User, 372
 - Back Up, 452
 - Check and Repair, 462
 - Conversion from Older Versions, 497
 - Delete, 461
 - Maintenance, 450
 - Manage Users, 372
 - Move to a New Location, 440
 - Multi-User, 440
 - New Name, 459
 - Opening, 8, 9
 - Restore, 457
 - Share, 441, 442
- Database Design Fields. See Also Fields
- Database Security. See Security
- Date, 394
 - Annual Event, 394
- Decimal, 395
- Decimal Places, 399
- Default File Locations, 450
- Default value, 398
- Define Fields. See Fields
- Delete
 - Contact, 30
 - Database, 461
 - Lookup, 30
 - Records, 57
- Details, 84, 105
 - History, 107
- Discount, 289
- Divisions, 276
- Document
 - Printing, 181
 - Template, 170
- Documents Tab, 64
 - Adding Files, 65
 - Adding Shortcuts, 65
 - Editing Files, 66
 - Removing Documents, 67
- Drip Marketing, 230
- Drop-down List, 397, 404
 - Allow Editing, 409
 - Importing, 406
 - Lookup, 43
 - Minor Changes, 409
 - Multiple, 22
 - Multi-select, 397
 - Sharing, 404

- Show Descriptions, 398
- Using, 21, 397
- Duplicates, 465
 - Combining, 466
 - Tips, 466
- Duplicating Contact, 26, 397
- Dynamic Groups, 255

E

- Edit Mode, 56
- Edit Replace, 470
- Edit Template, 170
- Editing Activities, 102
- E-mail, 395
 - Address Book, 160, 203
 - Attach to Contact, 190, 194
 - Attachments, 177, 204
 - Creating a Contact, 188
 - Creating a Template, 170
 - Creating an Activity, 198
 - Folder List, 201
 - Internet client, 158
 - Mail Merge, 170
 - Merging a Template, 176
 - New, 203
 - Outlook, 163
 - POP3, 158
 - Preview Pane, 201, 202
 - Quick Attach, 190
 - Send/Receive, 205
 - Sending from ACT!, 164, 166
 - Sending from ACT! E-mail, 203
 - Setup, 158
 - Signature, 212
 - Signature Formatting, 159
 - To Group or Company Members, 179
 - Window, 201
- E-marketing, 214
 - Call Lists, 230
 - Creating an Account, 217
 - Downloading History, 226
 - Drip Marketing, 230
 - Modifying Templates, 222
 - Results, 226
 - Scoring, 227
 - Sending, 220
 - Surveys, 233
 - vs Outlook, 214
- Enabling Synchronization, 477

Enter Stop, 437
 Envelopes, 183, 185
 Eudora Pro, 158
 Events
 Defined, 156
 Managing, 156
 Excel, 306
 Editing the Quote template, 299
 Pivot Table, 306
 Export to Excel, 306

F

Facebook, 72
 Fax, 180
 Mail Merge, 176
 Field Entry Order, 437
 Displaying, 437
 Field Format, 398
 Codes, 399
 Field Level Security, 411
 Fields, 17, 19
 Address, 394
 Allow Blank, 396
 Allow Multi-select, 397
 Annual Event, 394
 Attributes, 393
 Blanks, 396
 Character, 394
 Currency, 394
 Customizing, 391
 Date, 394
 Decimal, 395
 Decimal Places, 399
 Default value, 398
 Drop-down, 404
 E-mail, 395
 Enable type-ahead, 398
 Field Format, 398
 Field Level Security, 411
 Field Name, 17, 393
 Generate History, 396
 Initial Capitals, 395
 Length, 399
 Limit to List, 397
 Lowercase, 395
 Memo, 395
 Number, 395
 Phone, 395
 Picture, 396

Primary field, 397
 Sharing Drop-down Lists, 404
 Show Descriptions, 398
 Time, 394, 396
 Triggers, 403
 Type, 393
 Uppercase, 396
 URL, 396
 Use Drop Down List, 397
 Yes/No, 396
 File Locations, 450
 Filter
 Calendar, 94
 Calendar Display, 120
 Calendar or Task, 120
 Printed Calendar, 85, 95
 Report, 328, 356
 Task List, 98, 120
 First Name Prefixes, 46
 Formatting
 Layout, 433
 Reports, 340
 Function Keys, 7

G

Generate History, 396
 Global Toolbar, 11
 Google, 73
 Grant Calendar Access, 118
 Graph, 311
 Graphics, 209
 Group Layout Design. See Layout Designer
 Groups, 254
 Add Members, 255, 262
 Associating Activity or Opportunity, 280
 Converting to a Company, 275
 Create, 259
 Criteria, 266
 Dynamic, 255, 261
 Filter Notes/History Tab, 282
 Lookup, 283
 Static, 255, 261
 Subgroups, 276
 View, 254
 GroupWise, 158

H

Handles, 421

Hierarchy, 277
 History
 Attachment, 183
 Details, 105
 Record for multiple contacts, 108
 Recording, 106
 Removing Files, 67
 vs Notes, 112
 HTTP Sync, 484, 488

I

ID/Status, 19
 Image, 209
 Import
 Drop-down List, 406
 Inactive Opportunity, 301
 Inactive User, 375
 Initial Capitals, 395
 Insert
 Contact, 21
 Note, 109
 Install Study Guide Files, 9
 Integrity Check, 462
 Internet Explorer
 Attach Web Page, 74
 Internet Sync, 484, 488
 Invitation, 79, 85, 129, 162, *See also*
 Meeting Request
 Responding, 130
 Invitations, 127

K

Keyboard, 8
 Function Keys, 7
 Keystrokes, 445
 Resetting Shortcuts, 446
 Keyword Search, 51

L

Labels, 185
 Last Name Prefixes, 46
 Last Name Suffixes, 46
 Layout, 15, *See* Layout Designer
 Changing, 15
 Default View, 11
 Defined, 416

 Sizing Windows, 16
 Layout Designer
 Adding Fields, 427
 Adding Tabs, 431
 Adding Text, 432
 Aligning Objects, 425
 Background Color, 434
 Displaying, 417
 Editing, 417
 Field Entry Order, 437
 Formatting, 433
 Formatting Toolbar, 420
 Handles, 421
 Modifying, 420
 Moving Objects, 424
 Renaming Labels, 422
 Same Width Height, 436
 Saving, 418
 Selecting Objects, 421
 Sizing Objects, 421
 Splitter, 417
 System Tabs, 417
 Tabs, 430
 Testing Tab Order, 436
 Toolbox, 417, 419
 Layout Tabs, 14
 Letter, 180
 Attach document, 182
 Creating, 180
 Printing, 181
 Limit to List, 397
 Limited Access, 20, 142, 260, 380, 382
 Add Additional Teams/Users, 384
 Assign New, 383
 Assigning to a Lookup, 383
 Lookup By, 386
 Managers Team, 387
 Link to Company Field, 400
 Link vs Associate, 269
 LinkedIn, 73
 Locating Contacts, 34
 Log on, 7
 Logon User, 372
 Lookup, 41
 Add to, 48
 Advanced Query, 283
 Annual Events, 55
 Any fields, 54
 By Example, 240, 284
 Contact, 44
 Contact Activity, 238

Contacts, 34
 Delete, 30
 Duplicates, 465, 469
 Keyword, 51
 Modified, 238
 Narrow, 49
 Nav Bar, 40
 Not Modified, 238
 Operators, 42
 Opportunity Fields, 305
 Options, 47
 Previous, 50
 Printing, 59
 Secondary Contacts, 62
 Stage, 305
 Tips, 43
 Wildcards, 240
 Lookup Selected, 58
 Lost Sale, 301
 Lotus Notes, 158
 Lowercase, 395

M

Mail Merge, 170
 Creating a Template, 170
 E-mail, 176
 Fax, 176
 Word Processor, 176
 Manage Activity Types, 148
 Manage Product List, 294
 Manage Teams, 381
 Manage Users, 372
 Manager Role, 370
 Marketing Results Tab, 229
 Meeting Request, 79, 85, 133, 162, 187
 Meetings. See Activities
 Memo, 180, 395
 Menu, 7, 445
 Bar, 11
 Resetting, 446
 Menus and Toolbars
 Customizing, 443
 Merge Duplicates, 466
 Messenger ID, 20
 Microsoft Outlook. See Outlook
 Microsoft Word, 168
 ACT! Menu Item, 168
 Choosing, 168
 Mini-calendar, 80, 101

Modifying Activities, 102
 Moving Between Records, 34
 Moving Objects, 424
 Multi-User Database, 440
 My Record, 17, 170, 340

N

Names
 Fixing Problems, 46
 Nav Bar, 12
 Network Sync Service, 483
 New Activity Types, 148
 New Contact, 21
 New Database, 390
 New Opportunity, 286
 New Template
 Report, 336
 No Access, 411
 Notes, 109
 Associating with a Group/Company, 280
 Editing, 111
 Preview Area, 111
 Sharing with Company or Group, 279
 Spell Check, 112
 Tab, 109
 Viewing, 111
 vs. History, 112
 Number, 395
 Number of Characters, 399

O

OLEDB2 Connection, 500, 501
 Omit Selected, 58
 Opening a Database, 8, 9
 Opening ACT!, 6
 Opportunity, 286
 Add, 286
 Close, 301
 Currency, 290
 Customizing Tab, 292
 Discounts, 289
 Edit, 295
 Export to Excel, 306
 Graph, 311
 List View, 302
 Pipeline, 308
 Probability, 287
 Process, 287, 292

- Product List, 294
- Products, 288, 289
- Quote, 296
- Reports, 334
- Security, 304
- Stage, 287, 292
- Opportunity List, 302
 - Filters, 302
- Other Templates, 174
- Outlook, 163
 - Address Book, 160
 - Attach E-mail to Contact, 190, 194
 - Calendar, 99
 - Calendar Sharing, 131
 - Create an Activity, 198
 - Creating a Contact, 188
 - Default Address Book, 160
 - Inbox, 187
 - Meeting Request, 85, 187
 - Rules, 196
 - Sending E-mail, 166
 - Sending from the Contact Record, 164, 166
- Outlook Calendar
 - Updating, 133
- Outlook Express, 158, 163

P

- Palm, 5, 494
- Password, 7, 373
 - Policy, 376
 - Setting Your Own, 379
- PDF, 329
- Personal E-mail, 20
- Personal Files
 - Backup, 452
- Phone, 395
 - Format, 395
- Picture, 396
- PIM, 78
- Pipeline Report, 308
- Pivot Table, 306
- Plaxo, 73
- Pocket PC, 5, 494
- Preferences
 - File Locations, 450
 - Limited Access, 30
 - Names, 46
 - Word Processor, 168

- Prefixes, 46
- Premium version, 5
 - Advantages, 5
- Primary Field, 397
- Print
 - Attach document, 182
 - Calendar, 95
 - Create History, 182
 - Envelope, 181, 185
 - Labels, 185
 - Letter, 181
 - Report, 328
- Print Preview, 329, 330
- Priorities, 135
 - Activating, 135
 - Customizing, 135
 - Deactivating, 135
- Private, 20, 28, 260
 - Contact, 36
 - Note, 110
- Private vs. Public Activities, 142
- Probability, 287
- Process, 287, 292
- Product List, 294
- Products, 288, 289
- Promote, 62
- Properties Window, 341
- Public vs. Private Activities, 142
- Public/Private, 20, 260
- Purge. See Remove Old Data

Q

- Queries, 239
 - Advanced, 242
 - And/Or, 244, 248
 - Defined, 239
 - Deleting, 251
 - Editing, 244, 284
 - Grouping, 250
 - Lookup By Example, 240
 - Operators, 244
- Quick Attach, 190
 - Messages that didn't attach, 193
 - Preferences, 191
- Quote, 296
 - Attach to Contact, 297
 - Create, 297
 - Editing the template, 299
 - Prompt for number, 296

R

Read Only Access, 388, 411
 Record, 17
 Browsing, 34
 Delete, 30
 Locating, 34
 New, 21
 Record History, 106, 108
 Recurring Activities, 144
 Referred by, 19
 Reindex, 462
 Related Task Pane, 38
 Related Tasks Pane, 12
 Relationships, 68
 Remote Database
 Restore, 486
 Remove Old Data, 471
 Rename
 Database, 452
 Replace, 470
 Report, 328
 Design, 337
 Favorites, 333
 Field Identifier, 342
 Filters, 330, 356
 Formatting, 340
 Graph, 311
 List, 328
 Opportunities, 334
 pdf, 329
 Pipeline, 308
 Print, 328
 Print Preview, 329, 330
 Running Custom Reports, 358
 Scripting, 359
 Section, 346, 349
 Sorting, 346
 Subreport, 351
 Report Designer, 337
 Adding Objects, 339
 Address Labels, 364
 Checks, 362
 Close up blank space, 359
 Detail Section, 338
 Footer, 338
 Group By, 346
 Header, 337
 Options, 348
 Sizing Sections, 343

 Summary Field, 349
 Yes/No Fields, 362
 Report Sections
 Sorting, 346
 Report Template
 Creating, 336
 Reports
 OLE DB2, 500
 Reschedule Activity, 102
 Reset Menus and Toolbars, 446
 Restore, 457, 458
 Restore As, 459
 Restricted Role, 371
 Right-Click, 8
 Roles. *See* Security, *See* Security
 What is mine?, 19
 Rollover, 114
 Rules, 196

S

Sales Opportunity. *See* Opportunity
 Salutation, 19
 Save
 Contacts, 21
 Template, 173
 Scan and Repair. *See* Check and Repair
 Scan for Duplicates, 465
 Scheduled For, 121
 Scheduler. *See* ACT! Scheduler
 Scheduling. *See* Activities
 Accept, 129, 131
 Activities, 79
 Call, 79
 Decline, 129, 131
 For Multiple Contacts, 123
 For Others, 118
 General Tab, 118
 Invitations, 79
 Meeting, 79
 Notification, 129
 Personal Activity, 79
 Recurring Activities, 144
 Tentative, 129, 131
 To-Do, 79
 Vacation, 79
 Screen Elements
 Windows, 11
 Screen Layout. *See* Layout
 Secondary Contacts, 60

- Lookup, 62
- Promote, 62
- Security
 - Custom Permissions, 371, 374
 - Field Level, 388, 411
 - Limited Access, 20, 29, 260, 380
 - Limited Access by Default, 30
 - Private, 28
 - Public/Private, 20, 260
 - Role, 18
 - Roles, 370
 - Roles and Permissions, 495
- Security Role
 - What is mine?, 19, 371
- Selecting Objects, 421
- Send/Receive, 205
- Services, 288
- Setup Assistant, 7, 158, 191
- Share Database, 441, 442
- Shortcut Keys, 7
- Show Descriptions, 398
- Sizing Objects, 421
- Sizing Windows, 16
- Snooze, 140
- Sorting, 37
 - Contacts List View, 37
 - Report, 346
- Spell Check, 112
- SPEPersonalMessage, 220
- Splitter, 417
- Spouse, 20
- Stage, 287, 292
 - Lookup, 305
- Standard Role, 370
- Starting ACT!, 6
- Startup View, 12
- Static Groups, 255
- Subgroups, 276
- Subreport, 351
- Subscription List, 476, 490
- Suffixes, 46
- Summary Field, 349
- Surveys, 233
- Swiftpage, 214
- Sync Set, 477
 - Criteria, 478
- Synchronizing, 474, 482
 - Accept Incoming Syncs, 482
 - Application Sync, 482
 - Connection Methods, 475
 - Create Remote Database, 479

- Define Users, 475
- Defined, 474
- Enabling, 477
- HTTP Sync, 488
- Internet Sync, 475, 484, 488
- Network Application Sync, 475
- Network Sync Service, 475, 483
- Remote Database, 479
- Restore Remote, 486
- Subscription List, 490
- Sync Now, 488
- Sync Sets, 477, 478
- Troubleshooting, 491
- VPN, 475
- System Fields, 113

T

- Tables, 208
- Tabs. See Layout Designer
- Tag Mode, 57
 - Lookup, 58
 - Omit, 58
- Task List, 97
 - Calendar Comparison, 97
 - Filter, 98, 120
 - Scheduled For, 121
 - Viewing, 98
- Task Scheduler, 453, 489
- Team, 374
 - Create New, 381
 - Defined, 380
 - Limited Access, 382
 - Manage Teams, 381
- Template, 170, 176, 180
 - E-marketing, 218
 - Report. See Report Designer
 - Sending from E-marketing, 220
- Territory Realignment, 491
- Time, 394, 396
- Title bar, 11
- To-dos. See Activities
- Tool tip, 13
- Toolbar, 8, 11, 13, 445
 - Resetting, 446
- Toolbox, 417
 - Defined, 419
 - Displaying, 419
- Treo, 5
- Triggers, 403

U

Up Button, 277
Update Notification, 450
Uppercase, 396
URL, 396
Use Drop Down List, 397
User
 Adding, 372
 Inactive, 375
User fields, 20
User Security Roles, 495

V

Vacation, 79
vCard, 200
Version, 5
Version Update, 450
View Linked Fields, 274
View Toolbar, 13
VPN, 475

W

Weather, 73
Web Forms, 233
Web Info Tab, 71
 Links, 72

Web Page

 Attaching, 74
Web Site, 19, 71
Website, 72
Welcome Page, 11
Windows Screen Elements, 11
Won Sale, 301
Word. See Microsoft Word
Word Processor
 ACT!, 206
 Choosing, 167
 Create History, 182
 Graphics, 209
 Mail Merge, 170
 Mail Merge Fields, 173
 Printing, 181
 Ruler, 207
 Tables, 208
 Template, 170
 Toolbar, 207
Write
 E-mail, 164
 E-mail from Template, 164
 Letter, 180

Y

Yahoo, 73
Yes/No, 396
 Adding to Reports, 362