



ACT! by SAGE Premium for Workgroups Administrative Agenda

The Basics

ACT! vs. ACT! Premium for Workgroups
MSDE vs. SQL
Starting ACT!
Log on
Opening a Database
Opening Other Databases
Contact Record Basics Review
The Anatomy of a Contact Record
The "My Record" Contact Record
My Record
Understanding Security Roles
One to Many Relationships
Adding Users
Creating New Logon Users
Creating New Logon Users
Team Management
Limiting Contact Access
Assigning Limited Access to a
Lookup
Making Users Inactive

Setting Up

Using Available Documentation
Using the ACT! Knowledge Base
Setting Up a Multi-User Database
Examining Structure
File Structure
Directory Structure
Transferring Database to Another
PC
Enable Share on Existing Database

Database Administration

General Database Maintenance
Setting a Password for Yourself
Automatic Update Notification
Backup
Automatically Backing Up
Database
Manually Backing Up Your
Database
Restoring a Backup
Check and Repair
Deleting a Database
Cleaning up the Data
Duplicates
Tips for Dealing with Duplicates
Combine Duplicate Records
Edit, Replace
Edit, Swap or Copy Fields
Remove Old Data
Event Scheduling

Queries

Activity Data Mining
Queries
Lookup By Example
Advanced Queries
And/Or Revisited
Grouping
Exploring Data Through SQL
Creating/Populating a Group or
Company
Adding Multiple Contacts to
Groups/Companies



Configuring Workstations

- Basic Requirements
 - Minimum System Requirements
 - Local Administrator Rights
- Installing
- Understand/Modify Tools Preferences
 - File Locations for Multi-User Database
 - Setting Up E-mail System in ACT!
 - Adding ACT! Address Book to Outlook
 - Setting Up Default Outlook History
- Administrator Task – Turning on Sync
 - Setting up Application Sync
 - Setting up the Network Sync Service
 - Setting Up Internet Sync
- User Tasks – Remote Database
 - Modifying Setup for Internet Sync
 - Synchronizing the Remote Database
 - Set Up a Sync Schedule
 - Set Up a Sync Schedule with Scheduler

Synchronization Maintenance

- Synchronizing Databases
 - Administrator Tasks – Preparation
 - Determine and Setup Connection
 - Define Users
 - Determine Contacts to Synchronize
 - Determine Files to Synchronize
 - Setup the Environment
 - Administrator Tasks – Setting Up Sync
 - Enabling Synchronization
 - Defining Sync Sets
 - Create Remote Databases
 - Prepare the Remote Database(s)