

**ACT!**<sup>TM</sup>  
PREMIER TRAINER

**ACT!**<sup>TM</sup>  
CERTIFIED  
CONSULTANT

# ADMINISTERING ACT! 2010

## The Basics

- So You Get to be the ACT! Administrator
- ACT! vs. ACT! Premium
  - Premium Version Editions
- Log on
- Opening a Database
  - Setting Up For Class
  - Opening Other Databases
- Contact Record Basics Review
  - The Anatomy of a Contact Record
  - The “My Record” Contact Record
  - Our Practice Database

## Setting Up

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

### INCLUDED

- User Guide
- Lunch
- Power User Certificate

**COST: \$399**

**One Day Session  
9am - 4pm**

**Small Hands-On  
Classes**

**GUARANTEED or  
Return for Free  
within 90 days**

## Configuring & Installing Workstations

- Pre-Install Checklist
  - Do you have right ACT! version?
  - Is your other software compatible?
  - Meet Minimum System Requirements?
  - Verify 2GB Free Space
  - Ensure File/Printer Sharing Enabled
  - Set System Restore Point
  - Verify Local Administrator Rights
- Pre-Install Tasks
  - Create install folder
  - Uninstall earlier versions
- Installing on Workstations
- Applying Some Performance Tweaks
- Understand/Modify User Preferences
  - File Locations for Multi-User Database
  - Setting Up E-mail System in ACT!

## Database Security

- Database Security
- Understanding Security Roles
  - Custom Permissions
- Creating New Logon Users
  - Making Users Inactive
- Password Management
  - Defining a Global Password Policy
  - Overriding Password Policy for Individ
  - Setting a Password for Yourself
- Team Management
  - Limiting Contact Access
  - Assigning Limited Access to a Lookup
  - Lookup Contacts by Access
  - “Managers” Team
  - Changing Security for Multiple Items
- Field Security

## Database Administration

- General Database Maintenance
  - Automatic Update Notification
  - Back Up
  - Automatically Backing Up Database
  - Manually Backing Up Your Database
  - Restoring a Backup
  - Deleting a Database
  - Check and Repair
  - Scheduling Database Maintenance
  - Checking the ACT! Scheduler Log
- Importing an Excel File
  - Converting the Excel File to .CSV file
  - Importing a .CSV File into ACT!
- Cleaning up the Data
  - Duplicates
  - Tips for Dealing with Duplicates
  - Combine Duplicate Records
  - Changing Default Duplicate Checking
  - Edit, Replace
  - Edit, Swap or Copy Fields
  - Remove Old Data
- Events



**SOLUTIONS DELIVERED**

**800-475-1047**

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**Synchronization Maintenance**

- Synchronizing Databases
- Administrator Tasks – Preparation
  - Determine/Setup Connection Method
  - Define Remote User(s)
  - Restore Database to Final Location
- Administrator Tasks – Creating Sync DB
  - Enable Synchronization
  - Manage Sync Sets
  - Create Remote Databases
  - Prepare the Remote Database(s)
- Administrator Tasks – 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 with Scheduler
  - Using the Subscription List
- Administrator – When Things Change
  - Moving Machines
  - Territory Realignment
  - Temporarily Disabling Sync
- Synchronization Troubleshooting

**Advanced Lookups**

- Activity Data Mining
- Queries
  - Lookup By Example
- Advanced Queries
  - And/Or Revisited
  - Grouping
  - Deleting Query Files
- Creating/Populating a Group or Company
  - Adding Multiple Contacts to a Group
  - Advanced Queries Companies/ Groups

**Appendix**

- User Roles and Permissions
- Converting an older ACT! Database
  - Standard vs. Custom Conversion

Would you like to be more successful using your ACT! software investment? Taught by a SAGE Certified ACT Premier Trainer and hands on so you can learn how to use the most advanced features found in ACT! Learn how to customize the database and mold it to fit your company needs. Then create personalized reports and selection criteria to get the information the way you need it. This class is designed to help you get the most out of your software investment by helping you understand how to leverage the power of ACT!

Training is an integral part of any successful software investment. That's why we recommend training with every ACT! Software system we install. The CRM Connection will help you to use ACT! Software to its fullest potential, whether you are using ACT! 2009, ACT! 2008, ACT! 2007, ACT! 2006, ACT! 2005 or ACT! 6.0. Guaranteed!

**View dates or sign up [www.jcscomputer.com](http://www.jcscomputer.com)  
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Payment in full is required for registration. You will receive confirmation for your requested class date once available space has been confirmed. Please wait on confirmation prior to making travel arrangements as classes do fill up. I have read & agree to the above terms and rates. JCS is authorized to apply charges to the above credit card for support services requested. Credit card or check accepted for On-sites & classes.

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P.S. Guaranteed or the next class is FREE! – ACT! Technical Support available**