

Table of Contents

<i>Introduction</i>	1
About This Book.....	1
Conventions Used in This Book	2
What You Should Read	2
What You Don't Have to Read	3
Foolish Assumptions	3
How This Book Is Organized.....	3
Part I: The Opening ACT!.....	4
Part II: Putting the ACT! Database to Work	4
Part III: Sharing Your Information with Others	4
Part IV: Advanced ACT!ing	5
Part V: Commonly Overlooked ACT! Features.....	5
Part VI: The Part of Tens	6
Icons Used in This Book.....	6
Where to Go from Here.....	6
<i>Part I: The Opening ACT!</i>	7
Chapter 1: An Overview of ACT!	9
What Does ACT! Do?	9
The Typical ACT! User	10
A Few Concepts to Get You Started.....	12
The Basic ACT! Ground Rules.....	12
The Two ACT! Flavors.....	13
ACT! 2006	13
ACT! 2006 Premium for Workgroups.....	14
Chapter 2: The Various Faces of ACT!	15
Locating the Correct Database.....	15
The ACT! Login Screen	17
The Importance of Being My Record.....	18
Finding Your Way around in ACT!	19
The title bar.....	20
The record counter	20
The layout	21
The menu bar.....	22
The toolbar.....	23
The Back and Forward bar.....	23
The Contact Detail window.....	23
The Divider bar.....	24
The Navigation bar.....	24
The ACT! tabs.....	24
Getting Help When You Need It	25

Chapter 3: Getting Your ACT! Together	29
Creating a New ACT! Database	29
Copying an Existing Database	32
Working with Passwords	34
Setting a password	35
Changing a password	35
Giving ACT! the Preferential Treatment	36
General	37
Colors & Fonts	38
Calendar & Scheduling	39
E-mail	40
Communication	40
Startup	41
Customizing the Navigation Bar	41
Modifying the Icon Bar	42
Adding items to the toolbar	42
Tweaking the toolbar icons	43
Monkeying with the Menus	44
Ordering additional menu items	45
Adding a separator	45
Adding a custom command	46

Part II: Putting the ACT! Database to Work.....49

Chapter 4: Making Contact(s)	51
Adding New Contacts	51
Letting ACT! do the work for you: Automatic formatting	56
Getting the most out of ACT!: Using the drop-down lists	58
Duplicating Your Contacts	60
Deleting Contact Records	60
Thinking before deleting a contact	61
Three warnings before deleting a contact	62
The Contacts, They Are A'Changin'	62
Chapter 5: A Few Good Tabs and Lists	65
Meeting the Lists and Tabs	65
Remodeling Lists and Tabs	67
Adding or removing columns	68
Changing the order and width of columns	69
Sorting your lists and tabs	69
Contacting the Contact List	70
Getting to the Contact List is half the fun	70
Finding a contact in the Contact List	71
Tagging contacts in the Contact List	72
Corralling Your Secondary Contacts	73
Adding a secondary contact	74
Deleting a secondary contact	75
Promoting a secondary contact	75

Documenting Your Documents.....76
 Adding a document76
 Opening a document.....77
 Removing a document77
 Changing the Order of Columns78

Chapter 6: The ACT! Lookup: Searching for Your Contacts 81

ACT! Is Looking Up.....81
 Performing Basic Lookups82
 Searching Your Groups, Companies, and Opportunities85
 Grappling with your groups85
 Calling all companies86
 Oglng your opportunities.....87
 Performing Special ACT! Lookups.....89
 Searching by keyword.....89
 Annual event lookups92
 Searching by contact activity93
 Creating Advanced Queries95
 Looking up by example.....95
 The Advanced Query97

Chapter 7: Stamping Out the Sticky Note 99

Getting to Know ACT! Notes99
 Adding a note.....100
 Working with notes101
 Discovering ACT! Histories102
 Creating field histories.....102
 Clearing activity histories103
 Manually recording a history.....104
 Working with Your Notes and Histories106

Chapter 8: Playing the Dating Game 109

Scheduling Your Activities109
 Working with the ACT! Calendar114
 The mini-calendar117
 The Recap List117
 Using the Task List118
 Creating a lookup from the Task List119
 Printing the Task List120
 Exploring Activities.....121
 Viewing the Activities tab.....122
 Editing your activities.....122
 Clearing activities.....123
 Creating an Activity Series125
 Using the Activity Series Template Creation Wizard125
 Scheduling an activity series127
 Modifying an activity series128



***Part III: Sharing Your Information with Others* 129**

Chapter 9: Using the Basic ACT! Reports 131

- Knowing the Basic ACT! Reports 131
- Running an ACT! Report 136
- Printing Address Books 139
- Creating Mailing Labels and Envelopes 142
- Modifying Labels and Envelopes 144
- Working with Quick Report 146
 - Creating a Quick Report 147
 - Setting the Quick Report preferences 147

Chapter 10: Designing Your Own Reports 149

- Understanding the Report Designer 149
- Mastering ACT! Report Basics 150
 - Saving early and often 152
 - Using the toolbox and properties 152
- Changing the Report Content 154
 - Working with existing fields 154
 - Adding a field 155
 - Adding a summary field 157
- Filtering Data in a Report Template 159
- Sectioning Your ACT! Report 160
 - Defining report sections 160
 - Modifying report sections 161
 - Hiding a report section 162

Chapter 11: Merging Your Information into a Document 163

- Mail Merge Isn't Just about Mailing 163
- Picking Your Word Processor 164
- Creating a Document Template 166
- Grappling with Graphics 169
- Reaching an Audience of One 170
- We're Off to See the Mail Merge Wizard 172

Chapter 12: ACT! E-Mail 177

- Getting Started with ACT! E-Mail 177
- Setting Your E-Mail Preferences 178
- E-Mailing Your Contacts 182
 - E-mailing an individual contact 182
 - Sending mass e-mails 184
 - Editing e-mail addresses 188
- Working with Incoming E-Mail 189

***Part IV: Advanced ACT!ing* 191**

Chapter 13: Creating Contact Fields 193

- Understanding the Concept of Fields 194
- Do Your Homework! 195

Adding a New Field to Your Database	196
Working with Lists.....	202
Creating a drop-down list field	202
Creating a drop-down list	203
Managing the Product List	205
Managing the Process List	206
A Few More Customization Options	208
Adding custom activity types	208
Editing priority types	210
Chapter 14: Customizing Layouts	211
Modifying an Existing ACT! Layout	212
Arranging fields the way you want them.....	212
Adding new fields to the layout.....	215
Changing the tabs.....	217
Changing the order of things	218
Beautifying Your Layout	220
Doing minor touch-up work	220
Creating an extreme makeover	221
Adding the Finishing Touches	222
Lining up fields and labels.....	223
Resizing fields	224
Adding a logo or a graphic	224
Creating a circle in a square	225
Adding text boxes.....	225
Building a table.....	226
Chapter 15: Zen and the Art of Database Maintenance	227
Understanding the Need to Check and Repair	227
Determining the maintenance frequency	228
A little shopping list of database horrors	229
Performing Routine Maintenance	229
Backing Up the ACT! Database	231
Performing the basic ACT! backup.....	232
Backing up to various media	233
Restoring a backup copy of your database	233
Performing Spring Housecleaning.....	234
Weeding out duplicate contacts	235
Removing old data	237
Deleting a database.....	238
Copying or moving contact data	239
Performing a global edit/replace.....	240
A few more housekeeping tips.....	242
Chapter 16: Administering to Your Database	243
Working with the Database Users	243
Adding new users to the database.....	244
Deleting login users.....	247
Contact Access	250
Creating a team.....	250
Assigning access rights	251
Finding contacts by access level.....	253

Networking 101	254
Getting your network ducks in order.....	254
Padding the workstations	255
Silently Installing ACT!.....	255
Servicing the server	256
Working with the workstations.....	257
The ACT! Scheduler	258
Opening the ACT! Scheduler	258
Viewing or purging the task log	259
Importing New Information into ACT!	260
Chapter 17: ACT!ing with Synchronizations	265
What in the World Is Synchronization?	265
Why synchronize?	266
The synchronization cycle in a nutshell	266
Things that change during a synchronization	267
Performing a Synchronization in Four ACT!s	267
ACT! 1: Doing your homework.....	268
ACT! 2: Setting up the main database	269
ACT! 3: Setting up the remote database	273
ACT! 4: Synchronizing data	274
Maintaining the Synchronization	277
Viewing the last data synchronized	277
Looking up the sync set lookup.....	278
Viewing and printing sync settings	279
Re-creating a remote database	279
Stopping the synchronization process	280
Part V: Commonly Overlooked ACT! Features	281
Chapter 18: Integrating ACT! with Microsoft	283
Changing Your Outlook on Life.....	283
Importing Outlook contacts into ACT!.....	284
E-mailing Outlook contacts in ACT!	286
Configuring Outlook to work with ACT!'s Address Book	287
E-mailing ACT! contacts in Outlook	288
Creating ACT! history from an e-mail received in Outlook	289
Sharing ACT! and Outlook calendars	290
Displaying Outlook activities in ACT!	291
Viewing ACT! activities from Outlook	292
Exploring the Internet.....	293
Viewing a contact's Web site.....	293
Taking advantage of Internet Links	294
Attaching a Web page to a contact.....	294
Excelling in Excel.....	295
Exporting a list to Excel.....	295
Importing a product or drop-down list into ACT!	297
Mapping ACT! fields to Excel	297

What's in a Word	298
Attaching a document to a contact record	299
Sending a document as an e-mail	299
Sending a document in a fax	300
Showing ACT!'s mail merge fields.....	300
Chapter 19: ACT!ing on Your Opportunities	301
Creating Opportunities.....	301
Initiating the opportunity.....	302
Modifying the opportunity.....	307
Closing the deal	308
You Can Quote Me on That	309
Creating a quote for an opportunity.....	310
Editing the opportunity quote template	311
Viewing the Opportunity List	311
Filtering the Opportunity List.....	312
Resetting the Opportunity List filters.....	313
Printing the Opportunity List	313
Working with Opportunity History.....	314
Reporting on Opportunities	315
Reporting on a single contact.....	315
Creating an opportunities graph.....	316
Viewing the opportunity pipeline.....	318
Chapter 20: Grouping Your Contacts	321
A Few Good Reasons to Create a Group.....	321
What All Groups Have in Common	323
Creating a Group	323
Understanding Group Membership	325
Adding static group members	325
Creating dynamic group members.....	327
Working with Groups	330
Using groups to schedule activities	330
Using notes with groups.....	332
Chapter 21: Joining a Company	335
The 411 on Companies	335
Hey Dude, Where's My Company?	336
The Companies tab	336
The Company List	337
Knowing the juicy company details	339
Hyperlinks	340
Company Housekeeping.....	341
Forming a new company	341
Creating a division (or subdivision)	342
Deleting a company.....	343
Converting a group to a company.....	344
Following the company rules.....	344

Joining the Company Association.....	346
Hyperlinking a contact to a company.....	346
Adding or removing company members.....	347
Working with a Company	349
Jotting down a company note.....	349
Associating a note, history, activity, or opportunity with a company	350
Accessing the company files.....	352
Getting the Company Reports	352
Chapter 22: Working with ACT! Premium for Web	353
Looking Before You Leap.....	353
Handling the hardware	353
Going on a Windows fact-finding mission	354
Installing IIS.....	354
What's in an IP name?.....	355
Stop the IP, I want to get on.....	356
Giving Windows an Internet Makeover	356
Confirming that IIS is alive and well.....	356
Inviting an Internet Guest Account	357
Making an ASP.NET of yourself	358
Just call me APFW	358
Installing ACT! Premium for Web	361
Opening your database	361
Web Site Administration tool.....	362
Inviting Others to the Party.....	364
You can't drive without a license	365
Logging in to ACT! Premium for Web.....	365
Feeling a sense of déjà vu.....	366
 Part VI: The Part of Tens	 367
Chapter 23: Ten Reasons to Use ACT! Premium for Web	369
Chapter 24: Ten Tips to Make ACT! Work Better	375
 Index.....	 381