



Adminstrating ACT!

Other Information

Version: ACT! 2009/11*

Duration: 4 hours

Cost: \$249 inc GST

A comprehensive ACT!
Administration Manual is
included with this course

*Also suitable for ACT! 7
& above Users

Introduction: The Adminstrating ACT! Course is a 4-hour course designed to provide the skills required to administer and maintain an ACT! database.

Audience: This course is designed for individuals who are responsible for administering and maintaining their ACT! Database.

Pre-Requisites: Understanding of ACT! and basic Windows functions. Completion of the ACT! Essentials Course or equivalent experience.



The Basics

- So You Get to be the ACT! Administrator
- ACT! vs. ACT! Premium
- Opening a Database
- Contact Record Basics Review
- The Anatomy of a Contact Record
- The "My Record" Contact Record

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 to Another PC
- Enable Share on Existing Database

Configuring & Installing Server and Workstations

- Pre-Install Checklist
- Pre-Install Tasks
- Installing on Workstations
- Applying Some Performance Tweaks
- Understanding and Modifying User Preferences
- File Locations for a Multi-User Database
- Setting Up Your E-mail System in ACT

Database Security

- Database Security
- Understanding Security Roles
- Creating New Logon Users
- Password Management
- Team Management
- Field Security

Advanced Lookups

- Activity Data Mining
- Queries
- Advanced Queries
- Creating and Populating a Group or Company

Database Administration

- General Database Maintenance
- Automatic Update Notification
- Back Up
- Deleting a Database
- Check and Repair
- Scheduling Database Maintenance
- Importing an Excel File
- Cleaning up the Data
- Events

Synchronisation Maintenance

- Synchronising Databases
- Preparation
- Creating the Sync Database
- Turning on Synchronisation
- Remote Database
- When Things Change
- Troubleshooting