

ACT! Training Agenda

ACT! 2007 Administration Course

Public Training Class – DC Training Facility
Day, Month 01, 2008

10:00-10:20 *Introduction & Housekeeping*

- Classroom setup
- Student & Instructor Introductions
- Student/Instructor Expectations

10:20-10:45 *Installation & Conversion*

- Workstation installation discussion
- Server installation discussion
- Updating an installation
- Activation discussion
- Opening a database

10:45-11:30 *Database Creation*

- Creating and deleting databases
- Importing and exporting contacts
- Managing user accounts
- Managing teams

11:30-12:15 *Defining fields*

- Adding new fields
- Editing and removing fields
- Managing drop-down lists

12:15-1:15 *Lunch (Yum!)*

1:15-1:45 *Designing Layouts*

- Working with layouts
- Adding tabs and fields
- Adding objects to the layout
- Fine tuning a layout
- Setting field entry order

1:45-2:15 *Setting Preferences*

- Setting general preferences
- Setting calendar and scheduling preferences
- Setting communication preferences

2:15-2:45 *Menu and Toolbar Customization*

- Creating custom commands
- Adding and removing menu and toolbar commands
- Customizing the navigation bar

2:45-3:00 *Bio Break***3:00-3:45** *Database Maintenance*

- Backing up and restoring a database
- Performing routine maintenance
- Using the ACT! Diagnostic Tool

3:45-4:30 *Synchronization*

- Managing the Sync Server
- Managing the Sync Set
- Creating and deploying a remote database

4:30-5:00 *Wrap-Up*

- Course Recap
- Questions & Answers