

Sage ACT! Advanced Library Topics

Installing/Upgrading Sage ACT!

- Upgrading Your Database
- Downgrading a Premium Database

Working with Contacts

- Attaching Data to Contacts
- Managing Related Contacts
- Creating an Advanced Query
- Using Contact Activity Lookups

Scheduling Your Day

- Creating Activity Series Templates
- Creating Custom Activity Types
- Scheduling Activities for Other Users

Opportunities

- Tracking Sales Processes
- Managing Products
- Closing and Re-opening Sales Opportunities
- Customizing the Quote Template
- Customizing Opportunity Fields
- Locating Opportunities
- Exporting Opportunity Data to Excel
- Generating Opportunity Reports

Sage ACT! Reports

- Introducing the Report Designer
- Creating a Custom Report
- Working With Sections: Group and Filter Data
- Creating Sub Reports
- Summarizing Report Data
- Performing Calculations and Formatting Output
- Accessing ACT! from Third-Party Tools:
OLEDB

Dashboards

- Introducing the Dashboard Designer
- Customizing an Existing Dashboard
- Creating Custom Opportunity Dashboards

Managing Your Database

- Creating Users
- Using Lookup by Access
- Creating and Managing Teams
- Managing User Passwords
- Implementing Field Level Security
- Configuring User Preferences

Maintaining Your Database

- Updating ACT!
- Backing Up and Restoring a Database
- Checking and Repairing
- Scheduling Tasks
- Scanning for Duplicates
- Copying and Moving Data
- Removing Old Data
- Introducing ACTDiag