

Sage ACT! Essentials Library: Topics

Installing Sage ACT!

- What's New in Sage ACT!
- Installing Sage ACT!

Working with Contacts

- Navigating Sage ACT!
- Using the Setup Assistant
- Creating Contacts
- Using the Contact List
- Creating Notes
- Creating Secondary Contacts
- Exploring the Web Info Tab
- • Finding Data with Universal Search

Importing Data

- Performing a Typical Import

Scheduling Your Day

- Scheduling Activities
- Scheduling Recurring Activities
- Managing Activities
- Using the Calendar
- Using the Task List
- Sending Activity E-mail
- Managing Tasks with Sage ACT! Scratchpad

Working With E-mail

- Setting Up E-mail Integration
- Using Sage ACT! E-mail
- Managing Sage ACT! E-mail
- Setting Up Outlook Integration
- Sending Mail Using Outlook
- Managing Your Outlook Inbox
- Synchronizing Contact Data
- Creating Contact Sync Sets

Writing in Sage ACT!

- Using ACT! or Microsoft Word

Integrating with Google

- Configuring Google Calendar Integration
- Configuring Google Contact Integration
- Creating Google Contact Sync Sets
- Configuring Gmail History Integration

Opportunities

- Creating Opportunities
- Using the Opportunity List
- Utilizing Opportunity Graphs and Reports

Smart Tasks

- Creating Smart Task Templates
- Creating Smart Task Steps
- Running Smart Tasks
- Viewing Smart Task Status

Sage ACT! Reports

- Viewing and Creating Reports

Dashboards

- Using the Dashboard
- Filtering the Dashboard

Groups and Companies

- Using Groups
- Using Companies

Sharing Data

- Sharing Sage ACT! Data

Synchronizing Data

- Enabling Application Synchronization
- Creating a Remote Database
- Restoring a Remote Database

Sage Connected Services

- Setting Up an Account
 - Accessing Contact and Company Data
 - Creating an E-mail Campaign
 - Setting up Sage ACT! Connect
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