

ACT 2008: Level 2

1 Day

Prerequisites

- Windows XP Foundation, Windows Vista Foundation, or commensurate knowledge and experience

Objectives

- Customize the ACT! 2008 environment.
- Query a database.
- Exchange data.
- Work with the mail merge feature.
- Work with report templates.
- Administer the ACT! 2008 database.
- Use the Internet and email features of ACT! 2008.

Lesson 1: Customizing the ACT! 2008 Environment

- Lesson 1.1:* Specify Startup Preferences
- Lesson 1.2:* Customize Fields in a Database
- Lesson 1.3:* Customize Layouts
- Lesson 1.4:* Customize the Dashboard
- Lesson 1.5:* Modify Menus and Keyboard Shortcuts

Lesson 2: Creating Queries

- Lesson 2.1:* Perform a Lookup
- Lesson 2.2:* Create Advanced Queries

Lesson 3: Exchanging Data

- Lesson 3.1:* Import Data
- Lesson 3.2:* Export Data
- Lesson 3.3:* Transfer Data to a Pocket PC
- Lesson 3.4:* Working with a Remote Database

Lesson 4: Using the Mail Merge Feature

- Lesson 4.1:* Create a Template for Mail Merge
- Lesson 4.2:* Generate Form Letters

Lesson 5: Working with Report Templates

- Lesson 5.1:* Generate Reports Using a Standard Report Template
- Lesson 5.2:* Generate Reports Using a Custom Report Template

Lesson 6: Administering the ACT! 2008 Database

- Lesson 6.1:* Manage Data Security
- Lesson 6.2:* Perform Database Maintenance

Lesson 7: Using the Internet and Email Features of ACT! 2008

- Lesson 7.1:* Create Web Page Attachments
- Lesson 7.2:* Generate Maps and Driving Directions
- Lesson 7.3:* Integrate ACT! 2008 with Email Applications