

# ON LINE SERVICES

*Computer Training & Support*

## ACT! 4.0 Advanced

### Course description

Students will learn the advanced features of contact management. Students should understand introductory contact database terms such as contact, record, and report.

### Objectives

- Perform complex lookups by creating, naming, and using queries and Advanced queries.
- Automate procedures by recording and running macros, and by accessing macros through the toolbar.
- Exchange data by importing data into an ACT! database, exporting data out of an ACT! database, and synchronizing data between ACT! databases.
- Customize an ACT! database by modifying field names and attributes, layouts, menus, and keyboard shortcuts.
- Work with templates by creating, editing, merging and applying templates.
- Work with report templates by creating and editing them.
- Manage a database by securing it, backing it up, and by purging, compressing, and reindexing it.
- Connect to World Wide Web sites by using Internet Links.

### Course content

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#### Lesson 1: Creating and using queries

- Creating queries
- Creating Advanced queries
- Adding queries to the Lookup menu

#### Lesson 2: Creating macros

- Creating a macro
- Adding macros to the toolbar

#### Lesson 3: Importing, exporting, and synchronizing data

- Importing & exporting data
- Exchanging data using hand-held devices
- Synchronizing data

#### Lesson 4: Customizing ACT!

- Specifying startup settings
- Modifying fields in a database
- Modifying layouts
- Modifying menus and keyboard shortcuts

#### Lesson 5: Working with templates and mail merge

- Creating a mail merge template
- Generating form letters
- Adding templates to the Write menu

#### Lesson 6: Customizing report templates

- Modifying report templates
- Using a custom report template

#### Lesson 7: Administrating your ACT! database

- Managing data security
- Performing system maintenance

#### Lesson 8: Internet features

- Internet overview
- Internet Links