



Database Design & Layouts

Customizing Fields

- Field Attributes
- One-to-Many Tables
- Customize field and list behavior
- Customize field behavior
- Set field triggers
- Manage Drop-down Lists
- Creating Drop-down Lists for Importing
- Importing the Drop-down List
- Field Security
- Creating New Fields for Other Entities

Designing Layouts

- Defining and Modifying Layouts
- The Tool Palette
- Formatting Toolbar
- Modifying Layouts
- Renaming the Field Labels
- Moving Objects
- Aligning Objects
- Adding New Fields to Your Layout
- Layout Tabs
- Adding Other Objects
- Formatting
- Changing Background Tab Color
- Make Same Width or Height
- Testing Your Layouts
- Field Entry Order
- Customizing the Product View

Feature Customizations

Customizing Menus and Toolbars

- Adding an Object to the Menu/Toolbar/Keystroke
- Resetting Toolbars, Menus, and the Keyboard
- Modifying the Navbar
- Creating Custom Web Info Links
- Priorities
- Customizing Priorities
- Creating New Activity Types
- Events
- Creating a Custom Opportunity Process
- Creating Defined Product Lists
- Editing the Quote Template

Activity Series & Smart Tasks

Activity Series

- Designing an Activity Series

Smart Tasks

- Creating a Smart Task
- Adding Steps to the Smart Task
- Manually running a Smart Task
- Pending Smart Task Steps
- Status of Smart Tasks
- Editing a Smart Task
- Creating An Automated Smart Task
- Enabling a Smart Task
- How Does A Smart Task Run Automatically?
- Running Smart Tasks as a Service

Smart Tasks vs Activity Series

- Criteria for when to use Activity Series
- Criteria for when to use Smart Tasks
- Drip Marketing vs. Smart Tasks

Designing Dashboard & Reports

Creating Your Own Dashboards

Custom Components

Alternative Dashboards

Report Customization

The Report Designer Screen

- The Report and Page Header Sections
- The Detail Section
- The Report and Page Footer Sections

Adding Report Objects

- Formatting
- Sizing Sections
- Using Group By for Sorting or Subtotals
- Section Behavior
- Summary Fields
- Subreports

Report Filters

Using Scripting in Your Reports

Removing Blank Space Between Fields

This syllabus is based on The Quickstudy Guide for Act developed by Cornerstone Solutions and available for purchase from Mobile Information Service @ 800-550-4647.

Also, this course can be modified to meet your specific requirements. Please contact Jordan at the above listed number for assistance.

This course can be adapted to any of the previous versions of Act.

How to get the most out of this class:

Please feel free to mark up this outline with any changes you need for your specific training requirements.. Please email back to jordan@actconsultant.net or fax to 855-806-3539. A no charge appointment can be setup with our Sage Act! Premier Trainer to review your preferences so that we can present a custom class to your company.