ACT! ADMINISTRATION COURSE

SYLLABUS BASED ON ' *The Quickstudy Guide for Act!– Cornerstone Solutions*

Setting Up

Using available documentation
Using the ACT! Knowledge Base Enabling Your Database for Multiple
Users Examining Structure
- o   File Structure
- o   Directory Structure
- o   Moving the Database to the Server Enable Share for an Existing Database Opening the Shared Database
- o   Pre-Install Checklist

Database Security

Creating New Users
Making Users Inactive
Password Management
Defining a Global Password Policy

Security
Understanding Security Roles
- o   Custom Permissions for Manager or Standard Roles
- o   Setting a Password for Yourself

Security – Record and Field level
- o   Limiting Contact Access (Premium Only)
- o   Team Management (Premium Only)
- o   Assigning Limited Access to a Lookup (Premium Only)
     Lookup Contacts by Access (Premium Only) "Managers

Database Maintenance

Database Preferences
- o   Disabling Notes and History Editing Disabling E-mail History
     on User Records Disabling File and/or E-mail Attachments
- o   Changing ACT!'s Default Duplicate Checking Criteria

File Locations for a Multi-user Database
General Database Maintenance Automatic Update Notification
Back Up
- o   Automatically Backing Up Your Database Manually Backing
     Up Your Database Restoring a Backup
- o   Restore As
- o   Deleting a Database
- o   Check and Repair
- o   Scheduling Database Maintenance
- o   Checking the ACT! Scheduler Log

Importing an Excel File

(this section continues on next page)
Cleaning Up the Data
      Eliminating Duplicates
      Tips for Dealing with Duplicates Combine Duplicate Records
      Mass editing records using Edit, Replace
      Remove Old Data (Notes, History etc.)

Synchronization

Synchronizing Databases
Administrator Tasks
Setting Up the Sync Environment
- *Setup the Connection Method Define Remote User(s)*
- *Restore the Database to Its Final Location*
- *Creating the Sync Databases*
  - *Enable Synchronization*
  - *Remote Synchronization Assistant*
- *Manually Creating Remote Databases*
  - *Manage Sync Sets*
  - *Create Remote Databases*
  - *Prepare the Remote Database(s) for Delivery*
- *Completing Synchronization Setup*
  - *Setting Up Application Sync*
  - *Setting Up the Network Sync Service (Premium Only) Setting Up*
  - *Port Forwarding*

Setting Up Internet Sync (Premium Only) User Tasks – Restoring and
Syncing Your Database
      Changes for Remote Internet Sync
      Synchronizing the Remote Database
      Set Up a Sync Schedule with the ACT! Scheduler
      Using the Subscription List in a Remote Database
Territory Realignment Synchronization Troubleshooting
Moving Databases

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 Act! Premier Trainer to review your preferences so that we can present a custom course to
your company.

> 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.*