



ACT! 2006: Level 2

Course number: 084740, Course length: 1.0 day

Course Description

In the first course in this series, ACT! 2006 Level 1, you gained the basic skills required to organize the information of contacts in the database. In addition to organizing and working with the data in the database, you might also want to search and retrieve specific data about your contacts, send email to them, and also maintain the information without the loss of data. In this course, you will query and manipulate data, customize the ACT! 2006 environment to work with templates, and administer ACT! and use its Internet features.

Course Objective: You will query and manipulate data, customize the ACT! 2006 environment work with templates, and administer ACT! and use its Internet features.

Target Student: Corporate users, small business owners, government, medical, education, and non-profit entities.

Prerequisites: To ensure your success, it is required that you have basic PC skills and an understanding of Windows.

Delivery Method: Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

Performance-Based Objectives

Upon successful completion of this course, students will be able to:

- describe a standard lookup and a query.
- manipulate data.
- customize ACT! 2006.
- work with templates and the mail merge feature in ACT! 2006.
- customize the report template to extract information from your database.
- examine how to manage the ACT! 2006 database.
- use the Internet and email features of ACT! 2006.

Course Content

Lesson 1: Creating Queries

Topic 1A: Perform a Lookup

Topic 1B: Create Advanced Queries

Lesson 2: Manipulating Data

Topic 2A: Import Data

Topic 2B: Export Data

Topic 2C: Exchange Data Using ACT! 2006 Link For Pocket PC

Topic 2D: Synchronize Data

Lesson 3: Customizing the ACT! 2006 Environment

Topic 3A: Specify Startup Preferences

Topic 3B: Customize Fields in a Database

Topic 3C: Customize Layouts

Topic 3D: Modify Menus and Keyboard Shortcuts

Lesson 4: Working with Templates and Mail Merge

Topic 4A: Create a Mail Merge Template

Topic 4B: Generate Form Letters

Topic 4C: Add Templates to the Write Menu

Lesson 5: Customizing Report Templates

Topic 5A: Modify the Report Template

Topic 5B: Use a Custom Report Template

Lesson 6: Administrating the ACT! 2006 Database

Topic 6A: Manage Data Security

Topic 6B: Perform Database Maintenance

Lesson 7: Using the Internet and Email Features of ACT! 2006

Topic 7A: Use Web Page Attachments

Topic 7B: Generate Maps and Driving Directions

Topic 7C: Integrate ACT! 2006 with Email Programs